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The Business of War: IDEX 2023 Reveals the Latest Military Acquisition Trends in the Middle East

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Key points

- As a result of the war between Russia and Ukraine, global defence spending is on the rise. NATO member states in particular are increasing their military budgets substantially. This gives momentum to the global arms industry, which showcased its newest capabilities over the course of the five-day IDEX exhibition on 20-24 February 2023 in Abu Dhabi, United Arab Emirates (UAE).
- At IDEX 2023 the countries with the two largest economies in the Arabian Gulf region, the UAE and Saudi Arabia, stood out as the major customers of defence contracts. The UAE signed more than 50 agreements totalling US$6.3 billion, US$5.9 billion of which were signed with Emirati defence firms. The procurement of locally made defence weaponry allows the UAE government to continue its economic diversification policy and preparations for the post-oil era. It also decreases its reliance on Western security guarantees, especially as US foreign policy shifts its attention from the Middle East towards the US strategic competition with China.
- Like the UAE, Saudi Arabia is looking to advance its indigenous defence industries. In line with its Vision 2030 goals, the country plans to localise more than 50% of its military spending by 2030.
- Prior to the Iran-Saudi rapprochement in March 2023, instability in the Middle East – mainly perceived Iranian aggression and its support of regional proxies – served as the main driver behind Saudi Arabia's military spending. Although Iran and Saudi Arabia recently agreed to reinstate diplomatic relations following years of hostilities, deep mutual distrust between the two states is likely to remain.
- US Defense Secretary Lloyd Austin recently recognised climate change as a destabilising force and "existential threat" to US national security. As the UAE prepares to host the UN COP 28 climate summit in November 2023, his point is a timely reminder that defence industries must adapt accordingly and develop innovative and sustainable solutions that meet the strict equipment performance requirements defence ministries rely on.

Introduction

The International Defence Exhibition and Conference (IDEX) is one of the largest arms exhibitions in the world, held biennially in Abu Dhabi, United Arab Emirates (UAE). Defence firms from all over the world gather for a five-day event to demonstrate the latest land, sea, and air weapons and military technology systems. It is also a unique platform to establish and strengthen relationships with government departments, businesses, and armed forces throughout the Middle East and North Africa region.[1] Hosting such an event has considerable strategic and economic significance for the UAE. IDEX serves as a platform for the country to showcase its indigenous military capabilities and attract investments from and form partnerships with major global defence industry players.

This year, IDEX attracted special attention amid the ongoing conflict in Ukraine, which has spurred global defence spending to rise dramatically.

The exhibition also bolsters the UAE's image as a regional leader in defence and security, and demonstrates the country's commitment to maintaining strong defence capabilities and partnerships with influential nations by attracting high-profile attendees, including government officials, military leaders, and defence industry representatives. The event helps to raise the UAE's profile on the global stage and provides an opportunity for the country to engage with other nations and build partnerships to counter common threats and challenges.[2]

This year, IDEX attracted special attention amid the ongoing conflict in Ukraine, which has spurred global defence spending to rise dramatically. Setting aside the human cost, the unfortunate reality is that war is good for business. Following Russia's invasion of Ukraine in February 2022, the stock prices of the top five US weapons manufacturers, including Lockheed Martin, Raytheon, Boeing, Northrop Grumman, and General Dynamics, collectively surged nearly 13% since the onset of the war.[3] Even prior to the current war in Europe, global defence spending continued to rise dramatically. Before Russia's invasion of Ukraine in February 2022, NATO members typically aimed to allocate 2% of their gross domestic product (GDP) to military spending. Today European partners, including France, Germany and the United Kingdom (UK), are looking to increase their military budgets substantially, with Poland aiming to double its spending to 4% – the highest of all NATO members, including the United States, which spends 3% of its GDP on defence. As the United States re-evaluates its foreign policy priorities, a gradual change is under way, one that shifts the focus of its resources from the Middle East to prioritise Asia-Pacific-centric initiatives, while simultaneously countering Russian aggression in Ukraine. The United States' Gulf partners are gradually self-correcting their defence policies in response, reducing their reliance on Western arms suppliers, ultimately to their own benefit, as reflected in the lucrative deals signed at IDEX 2023 with local defence contractors.

Defense contracts and geopolitics in the Middle East

Even though the United States, Israel and the UK attended IDEX, many eyes were on Russia, whose defence companies' footprint dwarfed that of Ukraine in the exhibition. The sales of Russian weapons in Abu Dhabi did not go unnoticed by the US State Department. A State Department official stated, "While we regard arms sales and defense cooperation as a sovereign decision for individual states, we have long made clear with allies and partners worldwide our concerns about the revenue for Moscow as well as malign Kremlin influence that comes with continued dependence on arms purchases from Russia".[4] Meanwhile the West continues to urge its Arabian Gulf partners to limit the export of critical military components, including microchips and drones, to Russia, which the latter needs to prolong the war in Ukraine. It is likely that the UAE will continue to balance its relationships between the East and West by taking a neutral stance on the conflict while pushing for de-escalation and dialogue. "Diplomacy remains the only viable way to end the crisis", said Lana Nusseibeh, the UAE's permanent representative to the United Nations.[5]

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During IDEX the UAE government typically signs significant defence deals and partnerships with global defence contractors that allow it to procure advanced weapons systems and technologies for its armed forces. These procurement agreements often involve the transfer of technology, which allows the UAE to build up its own military-industrial complex and develop its domestic defence industry. Over the years the UAE has signed several deals worth billions of dollars with international defence contractors, including major US firms such as Boeing, Lockheed Martin and Raytheon. These agreements covered a wide range of defence equipment and technologies, including aircraft, missiles, and surveillance systems. In 2023 the UAE added China to its list of its traditional suppliers of strategic platforms. The Ministry of Defence in Abu Dhabi had issued a letter of intent to the Chinese National Aero-Technology Imports and Export Corporation in 2022 to buy an initial batch of 12 L-15 trainer/light fighter aircraft and an additional 24 aircraft in the future.

The decision to proceed with the contract to buy Chinese jets made headlines in 2023, because it signals that the UAE is diversifying its air force equipment away from US military hardware, although the United States still hopes to sell F-35 multirole combat aircraft to the UAE.[6] The UAE also signed multiple procurement and cooperation deals with Turkish defence contractors such as Baykar, Havelsan, Roketsan, and Otokar to buy unmanned aerial vehicles (UAVs), naval combat systems, missiles, and land vehicles. In fact, the UAE's own Reach-S UAV resembles Baykar's TB-2 so closely that unconfirmed reports emerged claiming that the UAE company EDGE Group-Halcon manufactured it via a technology transfer from Turkey.[7] In addition to procuring weapons for its own defence, the UAE has also become an important exporter of defence equipment to other countries in the region.[8] Currently it ranks 18th worldwide in major arms exports, with Egypt and Jordan serving as the main importers of the country's arms and equipment.[9] The UAE is the third largest arms exporter in the Middle East after Turkey and Israel.

Over the course of the five-day IDEX exhibition on 20-24 February 2023 the UAE signed more than 50 agreements totalling US$6.3 billion, US$5.9 billion of which were signed with local Emirati defence firms. Supporting the local defence sector has a two-pronged effect. Firstly, it enables the

country to diversify its economy away from dependence on oil, particularly as the world attempts to move toward sustainable energy. Secondly, defence self-sufficiency allows the UAE to decrease its reliance on Western security guarantees, especially as the United States shifts its attention eastward. By developing its own defence industry the UAE aims to reduce its dependence on imports and create a self-sufficient supply chain.

Additionally, the development of advanced technologies is expected to lead to spillover benefits for other industries, such as aerospace, transport and telecommunications, creating more local job opportunities. The overall benefit to the country will be increasingly significant considering the population of Dubai alone is expected to double in the next two decades.[10] Another benefit might be increased control over national security. By developing its own weapons and defence systems the UAE is attempting to tailor its production capabilities to meet its specific security needs and reduce its reliance on foreign suppliers.

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Developing military technology and know-how in the UAE

To improve its future military readiness, using technological innovation to meet its tailored security needs will enable the UAE to develop prototypes of the equipment it needs. According to Ash Rossiter, Assistant Professor of International Security at Khalifa University, a wide range of prototypes can be manufactured, then evaluated in experimentation programmes by the country's military. The prototypes that this experimentation process shows to be successful can then be produced on demand in small batches and rapidly introduced into service. UAE military personnel "now have the ability to be involved in the design of small batch items, pass requests to the manufacturer, be part of the testing regime, and arrange delivery", Rossiter explains.[11]

There are potential drawbacks in expanding the UAE's local weapons programme, warns Jean-Loup Samaan, a Senior Research Fellow at the Middle East Institute of the National University of Singapore. "Developing indigenous capabilities is a costly enterprise and only a few countries are able to aim for self-sufficiency today", he says. Instead, Samaan suggests that the UAE should consider following the models of Israel and Singapore, which have focused their defence efforts on one area of the military: "The first thing to do for Abu Dhabi should be to identify the precise contours of what Emirati strategic autonomy would be, and which area it would focus on, be it for ground forces, naval [forces], air forces or air defence".[12]

The Abu Dhabi-based defence firm EDGE, whose net value was US$5 billion in 2022, landed the largest deal of IDEX 2023, securing a US$1.2 billion contact with its subsidiary Halcon to supply the Desert Sting 25, an air-to-surface precision-guided munition "designed to be deployed on multiple racks on aircraft and unmanned aerial vehicles".[13] At the exhibition EDGE introduced 11 new unmanned products that support tactical intelligence and reconnaissance missions. Companies such as EDGE are paving the way to support the UAE's latest industrial strategy known as "Operation 300bn", which aims to increase the country's industrial sector contribution to its GDP from AED 133 billion (US$36.2 billion) to AED 300 billion (US$81.7 billion) by 2031.[14]

In line with 2023 being labelled the "Year of Sustainability" in the UAE and coinciding with the Emirates' hosting COP 28 in November, Tawazun Industrial Park (TIP), the industrial development arm of Tawazun Council,

an independent government entity that works closely with the UAE's Ministry of Defence and other security agencies, introduced an innovative (and sustainable) first at this year's IDEX. TIP launched the first Emirati-made plastic ammunition box dubbed "Kinana Peta", which is 68% lighter than the traditional steel version, is fully recyclable, and is sourced from local materials.

Saudi Arabia's ambitions to be a regional hub for defence and security investment

Besides the UAE, Saudi Arabia is also looking to advance its indigenous defence industries. In 2016 the-then Deputy Crown Prince, Mohammed bin Salman, launched Vision 2030, a strategic economic diversification programme designed to reduce the nation's dependence on oil by fostering the development of a robust domestic defence industry that in turn would boost local job creation. Saudi Arabia exhibited cutting-edge surveillance technology, drones, and various other types of military equipment at IDEX 2023, and the country's large footprint at this event underscored its ambition to localise more than 50% of its military spending in the coming years.

Although Iran and Saudi Arabia recently agreed to reinstate diplomatic relations, deep mutual distrust between the two states is likely to continue.

The recent volatility of global oil prices caused Saudi Arabia to spend less on defence over the last few years. Nonetheless, 8% of the country's GDP and 21.7% of total government spending still went to military expenditures in 2022.[15] Saudi Arabia ranks third in military spending worldwide,[16] and from 2017 to 2021 it ranked second in the world (after India) as the top importer of major arms systems. It remains the United States' largest foreign military sales customer, being responsible for 23% of all US weapons sales abroad (the second-largest customer, Australia, buys just 9.4% of exported US weapons).[17]

Currently only 2% of the Saudi Arabia's military expenditure is allocated to homegrown defence industries, so the country's objective to localise more than half of its defence expenditure by 2030 is ambitious. To achieve its aims Saudi Arabia plans to provide direct investments worth US$50-80 billion[18] to stimulate local industrial growth while establishing strategic partnerships with leading defence industries. The country passed sweeping reforms in 2018 allowing 100% foreign ownership of private sector firms for the first time in its history to incentivise further foreign investment. The policies of expanding direct government investments and luring foreign investors with the guarantee of full ownership of their companies are geared to expedite the transfer of knowledge and technology to Saudi Arabia while strengthening local expertise in the manufacturing and R&D sectors[19] to reach the Vision 2030 targets.

The main driver of Saudi Arabia's military spending is instability in the Middle East, mainly caused by what it perceives as Iran's aggression and its support of regional proxies that continue to undermine stability in the Gulf. Although Iran and Saudi Arabia recently agreed to reinstate diplomatic relations following seven years of hostilities, deep mutual distrust between the two states is likely to continue. Saudi Arabia is expected to modernise its national defence strategy by "acquiring high-tech and effective weapon systems that provide it with military superiority"[20] over Iran, which continues to push forward with its nuclear programme and supplies advanced military systems to the Houthi insurgency in Yemen, including cruise and ballistic missiles and UAVs.[21] Although there is reason to remain optimistic that ongoing direct talks

between the Houthis and Saudi Arabia will reach a peace deal in due course, without proper assurances in place Saudi Arabia will nonetheless look to bolster its annual defence spending.

Green defence: the future of sustainability in the military sector

The adverse effects of climate change will require the global defence industry to develop innovative, sustainable military equipment. In 2021 US Defense Secretary Lloyd Austin recognised climate change as a destabilising force and "existential threat" to US national security.[22] The US army's objective is to cut the greenhouse gas emissions of its equipment in half by 2030 and deploy an all-electric non-tactical vehicle fleet by 2035.[23]

In 2021 US Defense Secretary Lloyd Austin recognised climate change as a destabilising force and "existential threat" to US national security.

GM Defense, a subsidiary of General Motors, exemplifies this adaptation to "green" technology. The company, which produced thousands of vehicles, engines, and aircraft for the US armed forces during the Second World War and supplied nearly half a million M16 assault rifles during the Vietnam War, was selected to develop an armoured vehicle with an electric battery for the US army. GM Defense showcased its future military hardware at IDEX 2023 along with its latest hydrogen fuel cell, an "on-the-go" charging system for electric vehicles that will eliminate the need for fixed charging stations.

Under the 2015 Paris Climate Agreement governments are not required to report their militaries' greenhouse gas emissions.[24] However, estimates suggest that the global military sector currently generates an estimated 6% of all such emissions.[25] To put such a number in perspective, if the collective greenhouse gas emissions from all the world's militaries were counted together as a single country, it would have the fourth largest national carbon footprint in the world, emitting higher emissions than both Russia and Japan.[26] Yet even such figures are misleading, because they do not include emissions resulting from the impacts of war. For example, research found that during the first Gulf War the CO2 emissions released as a result of the eight-month-long Kuwaiti oil fires increased the global military carbon footprint by 1% in 1991 alone.[27] In light of the fact that the war in Ukraine has been raging for more than a year with no imminent end in sight, global emissions in 2023 are expected to rise in parallel.

Defence ministries have long neglected sustainable approaches to powering their military systems and equipment, because in order to ensure national security, which is their prime raison d'être, their priority remains performance, security, and reliability. Many in the defence industry lack any sense of urgency regarding the need to reduce greenhouse gas emissions, and this attitude effectively prevents the entire global defence sector from making substantial progress in reducing such emissions.

The International Defence Conference was held concurrently with IDEX 2023, and one of the topics of discussion was the possibility of humans developing capabilities to reach deep space in search of "Planet B" to serve as humankind's backup plan in the event the Earth becomes inhabitable. While such a scenario sounds like science fiction, governments must instil a sense of urgency in their defence industries to develop sustainable yet reliable military solutions, or moving to a new planet might become a reality, however unrealistic such a possibility currently is.

Conclusion

Russia's war against Ukraine has reconstructed the dynamics of modern geopolitics. The ongoing conflict in Europe has forced Western governments to both reassess perpetually sluggish military spending and re-evaluate the prevailing assumption that large-scale war across the continent is no longer likely.[28] As the European security order continues to evolve, so do the foreign policy priorities in Washington, and this has implications for the Middle East. The United States maintains a large military footprint across the region and continues to have major national security interests there, including ensuring the flow of oil, combatting terrorism, and preventing nuclear proliferation. However, since the era of the Obama administration the United States has undoubtedly reduced its commitment in the Middle East and recalibrated its foreign policy to prioritise its strategic competition with China.

As the European security order continues to evolve, so do the foreign policy priorities in Washington, and this has implications for the Middle East.

Such a realignment has not gone unnoticed in the Gulf, particularly when geopolitical tensions between Iran and the Arabian Gulf states remain high. Despite the recent warming of relations between Iran, Saudi Arabia and the UAE, uncertainty remains as to whether regional geopolitical tensions can truly subside. Directly following the news that Iran and Saudi Arabia agreed to restore diplomatic ties, the Iranian-backed Houthi militia announced that this deal would not impact the war in Yemen, claiming that they are not "subordinate to Tehran".[29]

On the global front, while the war between Russia and the Ukraine has resparked a power competition in the Middle East between the United States and the Eurasian powers of Russia and China, the countries of the region – mainly the UAE and Saudi Arabia – have gradually adapted to US disengagement by prioritising the localisation of their own defence industries. Both states are well positioned in the centre of a strategic yet turbulent environment and share a similar interest in maintaining peace. Likewise, the development of their indigenous defence industries allows both the UAE and Saudi Arabia to diversify their economies, increase employment opportunities at home, and establish themselves as the future leaders in the regional defence and security sectors. However, regional stability remains central to achieving such aspirations. China's key role in brokering the recent rapprochement between the Gulf's top adversaries also underscores the changing diplomatic influence Beijing now has in a once US-dominated playing field.

As the UAE and Saudi Arabia attempt to fast-track economic diversification by redoubling their efforts to reduce their dependency on hydrocarbons, industrial innovation in key sectors like the defence industry will remain pivotal to their long-term economic growth.

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