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Special Briefing
A grinding war vs. Russian loss in Ukraine: The impact, challenges, and policy opportunities for the MENA region

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Contents:

Preoccupation with war in Ukraine undermines Russia's influence, generates dependencies on MENA

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- *No matter what happens in Ukraine, Moscow's power projection capacities in the Middle East will remain limited.*

- *Russian losses in Ukraine will not lead to the disappearance of Moscow as an influential outside actor in the MENA region but rather will create for Russia new economic, political, and military dependencies on the Middle East.*

A year into its full-scale invasion of Ukraine, Russia's strategic errors on the battlefield and in the international arena have been stacking up. Not only are Russian forces trapped in a quagmire in Ukraine, but preoccupation with a losing war has complicated Moscow's ability to influence developments in the Middle East.

The conflict is expected to drag on, perhaps beyond 2023, although Russia looks unlikely to make any further significant territorial gains; and some notable military experts predict that the Russian February offensive in Donbas could "culminate" — run out of ammunition, manpower, and supplies — within the coming few months. With sufficient arms, training, and support from the Euro-Atlantic alliance, this could open up the opportunity for another Ukrainian counter-attack, breakthrough, and a further step toward expelling Russian forces once and for all. Nothing short of a Ukrainian victory and unquestionable Russian loss on the battlefield will be sufficient to deter future attempts by President Vladimir Putin to press for additional territorial gains in Russia's neighborhood. But if a definitive Russian military loss in Ukraine can be achieved, the reverberations would be felt not only in Europe but also in other corners of the globe — including the Middle East and North Africa.

Traditionally, Russia has arrayed the critical mass of its offensive military forces along what the Kremlin calls "an arc of steel," which stretches from the Arctic in the north to the Gulf in the south, to face the North Atlantic Treaty Organization (NATO). And for decades, Moscow has amplified its hard power strength by using a broad spectrum of non-military and "hybrid" methods to undermine Western interests in the countries located up and down this frontier. Regardless of the outcome of the war in Ukraine — whether it wins, loses, or remains bogged down — Russia's policy in MENA, the southernmost flank of the "arc of steel" will, thus, continue to be subsumed under the wider goal of eroding Western influence worldwide. Oftentimes the price of Russia's standoff against the West is paid by Middle Eastern countries. Last summer, Moscow provoked a global food crisis by limiting Ukrainian grain exports many Middle Eastern countries depend on. Next summer, this scenario may well repeat itself.

No matter what happens in Ukraine, Moscow's power projection capacities in the Middle East will remain limited. In military terms, the Russian footprint is already relatively minimal. At the same time, Moscow has become increasingly dependent on a small number of partners. As the West has been raining down sanctions on Russia and military aid into Ukraine, Russia's dependence on Iran as well as on Gulf countries has grown. In addition to buying up Iranian combat drones and looking for ways to link the two countries' banking systems in an effort to circumvent Western sanctions, the Kremlin has sought OPEC's help in keeping oil production low and, hence, bolstering global demand for Russian energy outside of Western markets.

Will Russia reorient its political focus to the MENA flank in light of mounting military losses in Europe's East? Unlikely. Moscow is culturally, emotionally, and historically far more invested in Eastern Europe than in the Middle East, where its actions are more opportunistic. Its priority is and will continue to be to reduce or reverse democratization tendencies and Western influence primarily in its proximity; only if resources permit will Moscow play the same spoiler role in MENA. That said, one should not expect that Russia's ample losses in Ukraine will lead to the disappearance of Moscow as an influential outside actor in the MENA region. Rather, the more blood and treasure that Russia expends in Ukraine, the more new dependencies on the Middle East this will create for Moscow. To what extent MENA countries will be willing to engage with Russia at the expense of their relationships with the West will be up to them.

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Russia's quagmire in Ukraine: The opportunities and risks for US MENA policy

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- *The Biden administration stepped up its engagement in MENA during its second year in office in part due to the global consequences of Russia's war against Ukraine, which included higher energy and food prices.*

- *Russia's strategic blunder of invading Ukraine can help focus and reinforce U.S. efforts to narrow the gap in trust with its MENA partners on a number of fronts, including tackling Russian disinformation in the region, building coalitions to pressure Moscow into ending its war, and prosecuting war crimes in Syria.*

The Biden administration stepped up its engagement in the broader Middle East and North Africa during its second year in office in part due to the global consequences of Russia's war against Ukraine, which included higher energy and food prices. This intensified involvement was a move in the right direction from the point of view of rebuilding frayed relations with strategic partners, but it was a re-engagement with limits.

How the Biden administration sets its strategic approach in the year to come and manages the interlinkages and interactions between the MENA region and other priorities in Europe and Asia will have broad implications for its overall foreign policy. The first variable in this broader equation to watch carefully is the outcome of the Russo-Ukrainian war. Here, few observers see anything but the long, steady grind of a war of attrition. But looking further ahead, many notable military experts predict that Russian forces are unlikely to make any additional battlefield gains, while Ukraine could eventually be in a position to finally push the invader out — so long as advanced Western arms and support are maintained, expanded, and accelerated. In the longer run, therefore, Russia's strategic influence and power is set to continue to steadily decline given the massive costs it is experiencing on the economic, human security, and reputational fronts.

Russia's declining power will ultimately impact its ability to shape and influence events in the MENA region. However, in the short run, particularly in the coming year, it is likely to continue its steady support for the Bashar al-Assad regime in Syria and keep pressing for increased security cooperation with the regime in Iran, which is experiencing its own strains. But the network of

Russia's partnerships across the region was never as broad and deep as what the United States developed over decades, even during the Soviet era.

The war in Ukraine put added strain on the United States' relationships with nearly all of its partners in the region as most MENA countries tried to balance their approaches toward Russia. Washington has been disappointed at MENA states' unwillingness to reproach Russian aggression in international forums like the United Nations; it has criticized Saudi-led OPEC for maintaining high oil prices that help fund the Russian war effort; and the U.S. has so far unsuccessfully pressed Israel to send weapons to Ukraine. An end to the Russo-Ukrainian conflict that results in Russia's defeat would at least remove this point of contention.

But in the meantime, if the U.S. charts a clearer course for its overall strategy in the MENA region, it can strengthen the partnerships it has built and foster greater mutual confidence. The trust gap that exists between the U.S. and many of its MENA partners well predates the Russo-Ukrainian war, being the result of multiple, complicated factors related to a broader geopolitical dynamic of complex multipolarity in the region and more broadly. But that gap can be reduced through deeper diplomatic engagement across MENA, while Russia's strategic blunder of invading its Western-backed neighbor can actually help focus and reinforce those U.S. efforts as well as wider American policies on a number of fronts:

- **Countering Russian disinformation in the region.** Russian media outlets, such as *RT Arabic*, have long saturated many MENA information spaces and enjoyed broad audience trust in the region despite their role in spreading disinformation about the West. This has again been apparent since the start of the full-scale war in Ukraine: *RT*, echoed by a network of official and semi-official local media channels and websites, has spent the past year pushing narratives of Russian battlefield victories, supposed Ukrainian war crimes, and purported Western responsibility for the conflict and its consequences. A Ukrainian military victory in the war would undeniably puncture *RT Arabic's* carefully cultivated reputation as a trustworthy news source for MENA publics — on the Russo-Ukrainian conflict or otherwise. But even short of this outcome, the U.S. needs to do a better job of framing the situation for MENA publics and reaching them. U.S. public media outlets like *Voice of America* as well as U.S. public diplomacy itself have a powerful story to tell about how Washington's steadfast support is helping Ukraine to preserve its sovereignty against an invading imperial power supported by Iran (even though this messaging might be better received if it is delivered by a source from outside of the collective West). The sharp contrast with the story Middle Eastern audiences receive from *RT* and its regional imitators could open an opportunity for raising the issue of Russian disinformation with regional governments. But the simultaneous strategic communications discussions with MENA authorities and the messaging strategy targeting public audiences will need to be well designed in advance, smartly articulated once rolled out, and messaging discipline closely maintained by U.S. diplomacy and U.S. publicly funded broadcasters.

- **Building an informal coalition of regional nations willing to put more pressure on Russia to end its war.** The collateral impact on MENA countries of the Russian attack on Ukraine, most notably in the form of sharp food and energy price hikes, has undermined popular support for Russia among Middle Eastern populations. In no country polled recently by *Al-Monitor* and Premise Data does a majority hold positive views of Russia's role in the region; while pluralities in Turkey, Iraq, and Yemen see Moscow, on balance, more negatively. Even in important regional partner Egypt, only around two-thirds expressed a mostly positive view, compared to almost a quarter who said Russia's role in their country has been mostly negative. This presents a clear opportunity for the Biden administration to use this anger and frustration among MENA societies over the war's impact on their livelihoods to encourage regional governments to be more active in pressuring Moscow — whether publicly or in private — to end its aggression against Ukraine.

- **Pursuing justice for war crimes in Russia and Syria.** De-occupying Ukrainian territory is an important prerequisite to helping build a legal case for Russian war crimes and crimes against humanity — a process and goal U.S. Vice President Kamala Harris mentioned again in her speech at the recent Munich Security Forum. Pushing forward on this can build much-needed legal precedent and policy groundwork for this or future U.S. administrations that may want to return to prosecuting earlier war crimes committed by the Russian-backed Assad regime in Syria.

At the same time, the continuation of the war of attrition, as much as an end to the conflict, may bring up fresh challenges or risks for U.S. policy toward the MENA region.

- **Refuting charges of hypocrisy.** Washington has taken a clear stance in opposition to Russia's occupation and illegal annexation of Ukrainian territory. But this legally and morally defensible position could generate charges of hypocrisy from within the MENA region if the far-right Israeli government pushes ahead with its own plans to annex areas of the West Bank or East Jerusalem and Washington is seen as doing little to reproach it. While the Russo-Ukrainian and Israeli-Palestinian cases significantly differ, Russian disinformation will seek to blend and mischaracterize both issues in local people's minds.

- **Rebutting perceptions of U.S. indecision.** Repeated delays and vacillations in Washington and European capitals about the levels of support or types of weaponry the Western alliance is willing to accord Ukraine have been a chronic saga throughout the war. Its implications are especially salient for Taiwan and its ability to deter a Chinese invasion. But U.S. partners in the Gulf may also be drawing their own conclusions. Washington should devote more resources to building confidence among MENA states reliant on U.S. military support. While debates over what type of military aid should go to Ukraine — and how soon — need be taken out of the media spotlight, and U.S. officials should significantly curtail their self-deterring rhetoric.

Russia’s invasion of Ukraine in 2022 marked a new phase in international relations, much in the same way that the 1991 collapse of the Soviet Union and the 2001 terrorist attacks against the United States did. U.S. foreign policy is still adapting to this new shock to the global system presented by the ongoing war and responding to the implications and externalities the conflict has on key regions like the broader MENA. Victory in Ukraine will require Washington to deepen rather than disengage from places like the Middle East, and these analyses suggest ideas about the pathway forward by examining the past year.

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Turkey playing for regional power on the margins

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- *Turkey has already shown a willingness to assert itself against Russian interests in Syria, Libya, and, especially, in the Armenian-Azerbaijani conflict, and a Russian military collapse in Ukraine would only whet Ankara's regional ambitions.*

- *But, in the long term, Turkey's capacity to play the role of major power should not be overstated. Corruption, cronyism, and simple incompetence continue to undermine the country, both in domestic and foreign policy.*

Since Russia's full-scale invasion of Ukraine last year, Turkey's policy has been aimed at maximizing gains for itself and minimizing the risks. Regardless of the direction of the conflict, going forward, Ankara will attempt to maintain this strategic balance — maximizing the diplomatic and economic benefits without risking an open break with either its NATO allies or with Moscow.

Turkey's policy, often described as "strategic balancing," has attracted widespread criticism in the West and charges of cynicism, but there's little question that it has been successful in its own way. Turkish diplomatic efforts, while not tremendously impactful on ending the war, have nonetheless won plaudits for their role in facilitating prisoner exchanges or pushing through the deal to enable Ukrainian maritime grain exports, as have its early sales of Bayraktar TB2 drones to Kyiv. At the same time, Turkey has benefited from aiding Russia in circumventing sanctions, while managing to stay more or less within the limits of the United States Treasury Department's forbearance.

In my own estimation, the most likely near- and medium-term outcome of the conflict is a long and ugly war of attrition. But what if the Russian efforts were to collapse entirely? Turkey has already shown a willingness to assert itself against Russian interests in Syria, Libya, and, especially, in the Armenian-Azerbaijani conflict, where it has forcefully and faithfully supported Baku's recent offensives with arms and expertise. There is every reason to assume that Ankara would continue to push where and when it can. At least so long as President Recep Tayyip Erdoğan is in power, Turkey's overarching foreign policy objectives will remain ambitious; despite recent efforts at "resetting" its relations in the Middle East, Ankara sees itself as an emerging great power. A Russian collapse would only whet Turkey's ambitions to use arms sales, aid, and military bases as a way of asserting that role, particularly in its "near abroad," including the wider Middle East and the South Caucuses. Should the opposition win the Turkish elections scheduled for 2023, the tenor and scale of these ambitions may be diminished, but they will not be erased entirely. The idea of Turkey as an emerging power is broadly accepted, after all, and the value of Turkey's expanding arms sales will remain attractive regardless of who holds power in Ankara.

All that said, the capacity of Turkey to actually achieve these ambitions should not be overstated. The Feb. 6 earthquake has laid bare how much of Turkey's vaunted success has been undermined by cronyism, corruption, and simple incompetence. In particular, its outreach to Sub-Saharan Africa and Central Asia, while certainly noteworthy, is simply not as significant as Turkish boosterism would suggest. To take a specific example, Turkish officials — and observers outside of Turkey — have long highlighted the country's influence over and friendship with the Turkic states of Central Asia. This is not wrong, but it has often been exaggerated. In 2021, for example, Turkey accounted for a respectable 8.1% of Uzbekistan's foreign trade. These numbers were dwarfed by Uzbekistan's giant northern and eastern neighbors however, with Russia accounting for 17.9% and China for 17.7% of that trade. In the case of a Russian collapse, these numbers are unlikely to change radically and even were they to do so, it is China, not Turkey, that would be best positioned to profit.

Turkey is playing an effective game at the margins of the war in Ukraine. It will continue to do so. Regardless of how the war unfolds or who is in power in Ankara, Turkey is likely to remain where it is today: a country with great ambitions, but still, largely, at the margins.

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Khamenei will stay with Putin to the end

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- *The Iranian regime has doubled down on its "Look East" policy, but for now it remains long on rhetoric and short on tangible results, especially economic ones; while Moscow's need for Iranian support is greater than Beijing's, especially militarily.*

- *A Russian loss in Ukraine is unlikely to fundamentally change Iran's regional prospects, but it could prompt some policymakers in Tehran to want to reassesses the value of the "Look East" policy.*

Over the last year, the Islamist regime in Tehran has doubled down on its "Look East" policy of banking on China and Russia as Iran's chief guardians against the West. It's a big gamble and, for now, there is little sign that it will yield greater tangible benefits for Tehran in 2023 than it did in 2022. Still, it is a reality that is here to stay.

With China, it has been a bumpy road. Beijing promises the right things to Tehran — including during President Ebrahim Raisi's February visit to China. But expressions of political solidarity alone are hardly a substitute for Iran's need for stronger economic relations. The Chinese are, by all accounts, refusing to commit to long-term projects, due apparently to a combination of a lack of grand economic vision in Tehran, sanctions-related constraints, as well as questions about the survival of the regime.

Russia is the other pillar of Iran's "Look East" policy. Moscow's need for Iranian support is greater than Beijing's, and cooperation comes at a lower cost. Russia is today more sanctioned than Iran; and Moscow, unlike Beijing, does not have to worry about offending Western sensibilities in its dealings with the Islamic Republic. Still, the growing breadth and depth of Iranian-Russian relations is hardly irreversible.

On what arguably should matter the most, as with China, Russia's economic cooperation continues to be a source of disappointment to Tehran. Both countries are cash-poor and dependent on selling oil to the same markets, such as China and India. This leaves military ties as perhaps the most natural point of convergence. Tehran has already sent drones to Russia for its war on Ukraine — further alienating Western powers — and there are credible reports that Moscow will soon deliver its advanced Su-35 fighter jets to Iran.

While such military transactions are significant, a closer geopolitical alignment between Tehran and Moscow would represent an even bigger leap. When, in July 2022, Raisi met with President

Vladimir Putin, officials in Tehran described the summit as the birth of a new regional understanding between Tehran and Moscow. So far, major signs of this realignment have been hard to come by, but Tehran appears hopeful. In particular, Iran expects that growing Russian-Israeli tensions could limit Israel's free hand over Syrian airspace.

For long, Russian-Iranian relations could readily be described as heavy on pledges and slogans but lacking in substance. Officially, Moscow and Tehran claim to be committed to jointly combatting a host of threats, from fighting secessionism and narcotics smuggling to establishing stability in Afghanistan, Syria, Iraq, the South Caucasus, and Central Asia, as well as generally challenging the United States' hegemony and promoting multilateralism in global politics. But undoubtedly, its war against Ukraine gave Moscow reason to bring Tehran closer to the Russian orbit.

Iran's prospects as a regional hard-power player, in places such as Syria, the South Caucasus, or Central Asia, will not greatly diminish or increase in the event of a Russian military defeat in Ukraine. After all, it was not Moscow that shaped Iranian prospects in those arenas as much as it was Iran's ability, or lack thereof, to make itself into a partner. What a Russian loss in the war could do, however, is to pressure the policymakers in Tehran to fundamentally reassesses the value of Supreme Leader Ali Khamenei's cherished "Look East" policy.

That said, the "Look East" policy is unlikely to be shaken from its pedestal. For Khamenei and the top brass of the Islamic Revolutionary Guard Corps, Russia has for some time been the principal counterweight against the West, even though Moscow had long refused to take sides in any of the major standoffs in the Middle East or to position itself as Iran's "protector." In turn, while these Russian preferences presumably have not changed, it is hard for the Russians to ignore the reality that Iran is the only major and relatively resourceful state in the region willing to side with Moscow against the West almost unconditionally.

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Russia is unlikely to be forced out of Syria

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- *Russia's presence and assets in Syria are about far more than Syria alone, with the Hmeimim airbase a strategically crucial hub for Moscow's military force projection into Africa, and the expanding naval facility in Tartus a critical foothold in the Mediterranean.*

- *Even a Russian loss in Ukraine is unlikely to significantly affect Russia's presence and posture in Syria; they might be eroded somewhat at the expense of other Middle Eastern countries or an opportunistic Tehran, but this would probably be independent of the war.*

When Russia invaded Ukraine a year ago, it didn't take long for questions to begin swirling around the possible impact a major war in Europe might have on Russia's presence and posture in Syria. Over the past 12 months, media reporting repeatedly delved into speculation, claiming Russia was withdrawing forces from Syria, that it was having to recruit Syrian troops en masse to reinforce its lines in Ukraine, and that Iran was exploiting all of this to take charge in Syria. In almost every single case, this conjecture has proven false, driven by unreliable sources or a lack of contextual knowledge on Syria.

Russia has not recruited, trained, and deployed Syrians on the battlefield in Ukraine, and it has not withdrawn combat troops from Syria. Russia's military presence, posture, and operational tempo all remain the same as prior to the invasion of Ukraine. One S-300 air defense system was withdrawn, but it had been temporarily under Syrian command, not Russian. Some Wagner mercenaries have departed Syria, but only once their sole purpose for being there had been completed: training Syrian units based in Hama and Homs. Since launching its intervention in Syria in September 2015, Russia's military has accomplished a lot with a relatively light footprint, and there appears to be no strategic or logical reason for why that could change.

Moreover, as far as the Kremlin is concerned, Russia's presence and assets in Syria are about far more than Syria alone. The Russian airbase at Hmeimim has become a strategically crucial hub for Russia's military force projection into Africa, and the expanding naval facility in Tartus is Russia's foothold in the Mediterranean. Russia's relative success in Syria has also secured it far greater levels of credibility across the Middle East than it had before 2015, allowing it to repeatedly challenge and undermine long-standing security norms advocated by the United States and Europe. For the Russian military and associated private security entities, Syria also offers valuable sources of revenue, particularly in the phosphate industry.

For these reasons, even a Russian loss in Ukraine is unlikely to result in a major change in Russia's presence and posture in Syria. As some regional states double down on or consider newly re-engaging with President Bashar al-Assad, it is possible that Russia's hold over the Syrian regime may erode somewhat, but that eventuality is likely independent of events in Ukraine. Iran remains a key actor in this wider equation too, and it continues to tussle for influence in Damascus as it has done for years. If Tehran is opportunistic and assertive, it could feasibly achieve a greater level of influence over Syria's regime and access to more security and economic opportunities. But within the wider dynamic, that is unlikely to represent anything truly transformative in terms of Russia's respective position.

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Growing sanctions on Russian energy could start to test OPEC+

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- *In response to Western sanctions, Russia has shifted larger volumes of crude exports to Asia, displacing Middle Eastern supplies, and pursued various other unilateral actions that could introduce tensions into OPEC+ dynamics.*
- *Looking ahead, a range of uncertainties, from Chinese demand recovery to the trajectory of the Ukraine war, and the cumulative impact of sanctions on Russia, could test the complex web of OPEC+ relationships.*

One year out, and the prospects for a resolution in Ukraine look dim. Western sanctions seek to hobble Russia's oil and natural gas industry, which the government depends heavily on to fund its war effort. As the Russian government calibrates its response, it has turned to several approaches, including shifting a significant, additional share of energy exports to Asian buyers as well as coordinating with OPEC+ to manage global supplies and ensure prices remain at a supportive level to help meet the fiscal targets of the group's participants.

However, as Russian crude exports displace larger volumes of Middle Eastern crude grades in Asia, and the gap in fiscal breakeven prices between Russia and key Middle East producers continues to grow, the alignment in interests between Russia and other key OPEC+ producers could start to break down. For many market observers, this has raised questions about the continued efficacy of OPEC+. Shared interests in preventing an oversupplied market and maintaining a floor under oil prices have been adequate for now, but various factors — from changing market dynamics to a diversity of post-pandemic political and economic priorities — could test the shared interests that underpin the group.

One such factor is the Feb. 5, 2023, G7-led price cap on Russian oil product exports, expected to have more damaging impacts than the previous, Dec. 5, 2022, crude price cap. Just days before the product price cap came into effect, OPEC+ announced it was maintaining its 2-million-barrel-per-day output cut from October 2022. By Feb. 10, Russia announced a unilateral cut of 500,000 barrels per day in response to the price cap. While this decision had immediate benefit for Middle Eastern producers by bolstering prices, it also flagged how Russia could either work to veto future OPEC+ efforts to raise output, or make deeper, unilateral cuts in response to mounting price cap and sanctions impacts. If unpredictable Russian actions drive further price spikes, this could test OPEC+ members' commercial relations with major buyers and political relations, including with the United States, if the group is not seen as taking sufficient action to tackle market imbalances.

Another possible test of the Russia-OPEC dynamic is the rapid rise in Russian crude supplies to Asia since the start of the Ukraine war, displacing supplies from the Middle East. To some degree, Middle Eastern exporters to Asia are protected: many supply their customers under term contracts; deep relationships have been established through significant investments into regional refineries and petrochemicals projects; and many Asian refineries are optimized for Middle East crude. While the European market has been a very willing buyer of extra Middle East crude (offsetting the losses of Russian imports), Europe does not offer the same growth opportunities as Asian markets, which could eventually create more friction between Middle Eastern and Russian exporters.

While OPEC+ continues to benefit its participants through higher prices, there are a range of uncertainties, from Chinese demand recovery to the trajectory of the Ukraine war and the cumulative impact of sanctions on Russia, that could alter the outlook, testing the complex web of OPEC+ relationships. In the years ahead, this could spell shifting influence within the group or even a more direct challenge to the continued role of the OPEC+ alliance.

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Good enough for some? The Ukraine war's assault on the reputation of Russian weaponry

Robert E. Hamilton
Non-Resident Scholar

- *The Ukraine war has exposed a serious design flaw in many Russian tanks as well as laid bare the impact of corruption in its defense industry, which will make it more difficult for Moscow to convince potential customers of the reliability and quality of its weaponry.*

- *But a government looking for weapons to put down an insurgency or protect against a neighbor not armed by the West might still find Russia's wares worth a serious look, particularly since they come with almost no strings attached.*

Long before United States President Dwight D. Eisenhower warned of the emergence of a military-industrial complex in 1961, the idea that war was good for business had been prevalent. But the poor performance of Russian military equipment in Ukraine is putting this aphorism to the test. In the Middle East and North Africa region, where two of Russia's four biggest customers are located, Moscow's reputation as a supplier of quality military equipment is likely to take a hit.

For example, the war has exposed a serious design flaw in many Russian tanks, in which stored ammunition can explode when the vehicle is hit, instantly killing the crew and sending the turret flying high into the air. The ubiquitous pictures of burned-out Russian tanks with their turrets lying dozens of meters from the tank's hull are certainly not images the Russian defense industry wants in potential customers' minds. The name Western media has settled on to describe the issue — "jack-in-the box flaw" — is as memorable as it is damaging to the reputation of Russian armor.

The impact of corruption in the Russian defense industry has also been laid bare. Ukrainian troops who have examined destroyed or captured Russian tanks say that in some cases it looked like the key component in their explosive reactive armor — designed to defeat anti-tank missiles — was never installed at the factory. Russia's arms industry suffers from "purposeful misreporting to siphon ministry dollars, feigned negligence, outright theft, and other endemically corrupt practices." The war in Ukraine has revealed the consequences of these systemic problems, sharply undermining Russia's ability to convince customers it can deliver reliable, high-quality equipment.

Western sanctions are also taking a toll on Russia's arms manufacturers. Previously, Russia could acquire some of the high-grade components for its weapons systems from Western countries by claiming they were for civilian use. But the sanctions the West imposed in 2014, and greatly strengthened in 2022 and 2023, make that much more difficult. Although it can still try to evade sanctions by using middlemen in non-sanctioned countries, this method requires great effort and cannot provide quality components in the numbers the Russian defense industry requires.

But Russia does have areas of competitive advantage. These lie not in the quality of the equipment it produces, but in its ability to deliver that equipment cheaply, quickly, and with few strings attached. U.S. equipment is more reliable and capable, but it comes with legally mandated vetting of the human rights record of the foreign military receiving it. The U.S. also requires customers to submit to intrusive "end use monitoring" inspections, again to ensure the equipment isn't used to commit human rights abuses as well as to certify that the technology in it is not disclosed to unauthorized parties. For customers who would prefer to avoid these processes, cheaper but lower-quality Russian equipment might be an attractive alternative.

It will be years before the true impact of the war in Ukraine on the Russian defense industry is apparent. Early signs are not good, but Russia is still a presence at international exhibitions like Aero India and the United Arab Emirates' International Defence Exhibition (IDEX), both of which were held in the last month. True, many of the Western firms at those same exhibitions are showcasing weapons that have proven decisively superior to their Russian counterparts in Ukraine. Moscow's promises to supply Iran with some of its latest weaponry, reportedly including Su-35 fighter jets, could, thus, convince Washington's Gulf partners to stick with American kit. But a government looking for weapons to put down an insurgency or protect against a neighbor not armed by the West might still find Russia's wares worth a serious look.

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