



The Changing Security Environment in the Middle East

*China's Expansion, Security-development Nexus,
and the Possibility of US–Japan Cooperation*

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About JIME Center

JIME Center was originally established on September 1974 as the Japanese Institute of Middle Eastern Economies (JIME) and made a fresh start on April 2005 as a unit of the Institute of Energy Economics, Japan (IEEJ).

The Center is the leading research institute in Japan specializing in the research of the Middle East and North Africa (MENA) region from a broad set of perspectives including politics, economy, society, security and energy security. Researchers are highly skilled professionals with considerable experience in the region. The Center also accepts qualified personnel from supporting member companies and works in cooperation with other research institutes in Japan and around the world. The JIME Center is dedicated to providing timely and unique in-depth analyses of the ever-changing developments in the region to both Japanese public and private sector. Through these activities, the Center aims to contribute to the further development of Japan's economy.

Acknowledgments

The Middle East is vital for Japan from the perspectives of energy security, the safety of Japanese citizens and business, and enhancement of the Free and Open Indo-Pacific Initiatives advocated by Prime Minister ABE Shinzo. However, there have been limited opportunities for experts of the Middle East studies and energy policy to discuss the U.S.-Japan alliance and their threat perceptions regarding the volatile political and security situation in the Middle East. As the political and economic situation in the Middle East becomes more vulnerable due to the global Covid-19 pandemic and the low oil prices, it is becoming more important for Japanese and American researchers to discuss the strategy and threat perception toward the Middle East.

In this report, various experts analyzed China's expansion into the Middle East and its interaction with the regional countries, the nexus of development, security, and stability in the region, and energy and the Middle East policy trends of the US and Japan.

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日本語序文

日本にとって中東地域の政治情勢は、エネルギー安全保障や日系企業・邦人の活動と安全、「自由で開かれたインド・太平洋」構想の普及といった観点からきわめて重要である一方で、米国の中東政策とエネルギー政策がどのように展開され、日本の諸政策にどのような影響を与えるかという問いに関する議論はほとんどなされてこなかった。新型コロナウイルスの感染拡大と石油価格の低迷を受けて、中東地域の政治・経済情勢が一層不安定になる中、中東情勢に関する日米の戦略や脅威認識について、中東地域やエネルギーを専門とする研究者が議論する機会はいっそう重要になっている。

このような背景から、本事業では日米の中東・エネルギー専門家による共同研究を通じて、中東地域における政治・安全保障環境の変化が日米両国に与える影響を分析し、日米間での対中東政策の共鳴や差異が生じる要因、そして中東における日米協力の可能性について検討してきた。また、中東の専門家からもフィードバックを得た。本報告書はその成果として、7人の専門家が中国の対中東進出と域内諸国の反応、中東諸国の開発・治安と安定性の行方、日米の対中東・エネルギー政策について論じたものである。本事業は国際交流基金日米センターの助成によって行われた。

本事業には米国・戦略国際問題研究所（Center for Strategic and International Studies: CSIS）から多大なるご協力を頂いた。中東部のジョン・オルターマン氏、ウィル・トッドマン氏、エネルギー部のニコス・ツァフォス氏、ジェイン・ナカノ氏、国際安全保障部のメリッサ・ダルトン氏に感謝申し上げます。新型コロナウイルスの感染拡大により、2020年度には米国出張や日本への招聘が叶わなかったものの、オンラインでの研究会や公開シンポジウムを通して活発な議論を行うことができた。

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1. Examining the importance of the Middle East in Chinese Foreign Policy

YATSUZUKA Masaaki

Introduction

China's presence in the Middle East has grown in recent years, in both economic and military terms. As the power balance between the two superpowers, China and the US, undergoes dramatic change, what effect will that have on the Middle East? Will China replace the US as the major power maintaining order in the Middle East? At a more basic level, what strategy is China pursuing through its involvement in the Middle East?

With these questions in mind, this paper aims to explain the status of the Middle East in China's overall foreign policy and its specific activities in the region. First, the author examines China's basic stance toward the international order, subsequently identifying the status of the Middle East in Chinese foreign policy. Second, the author examines the characteristics of the relations between China and the countries in the Middle East, as well as the status and directionality of their economic cooperation and military affairs. The author concludes by exploring the future of China's Middle East policy within a context of probable prolonged conflict between China and the US.

1. China's Approach toward the International Order and the Importance of the Middle East in Chinese Foreign Policy

The speeches and communiqués of the leaders of the Chinese Communist Party (CCP) are a helpful indication of China's basic approach in its foreign policy.

With respect to this, the first notable remark was made by Xi Jinping in a speech at the 19th CCP National Congress, with the significant recognition that “the world is undergoing major developments, transformation, and adjustment.”¹ The perception of the CCP leadership is that power is of paramount importance in the international order, and that the current international order is arranged around US hegemony.² However, the leadership is beginning to indicate that the international order has entered a period of major change in recent years. Behind this change is “the great adjustment in the international power balance,” as indicated at the 5th plenary session of the 19th CCP National Congress in October 2020; this primarily signifies the change in the power balance in the world due

¹ 「习近平：决胜全面建成小康社会 夺取新时代中国特色社会主义伟大胜利——在中国共产党第十九次全国代表大会上的报告」中华人民共和国中央人民政府 HP、2017 年 10 月 27 日、(http://www.gov.cn/zhuanti/2017-10/27/content_5234876.htm)。

² 山口信治「中国の国際秩序認識の基礎と変化」『防衛研究所紀要』第 18 卷第 2 号 2016 年 2 月、45-63 頁。

to the decline of the US and the rise of China.³ The Chinese Foreign Minister Wang Yi exhibited a similar stance in a press conference at the beginning of 2021, when he stated that “COVID-19 has accelerated the once-in-a-century transformation in an increasingly fluid and changing world.”⁴

Within this context, China is taking on an active role in this period of change in the international order. In a communiqué from the 5th plenary session of the 19th CCP National Congress held in October 2020, China indicated its ambitions to reform the systems constituting the international order in the form of high-quality development through the Belt and Road Initiative, and active participation in the systemic reform of global economic governance.⁵ The Chinese government sees the current international order as irrational and unjust, as being built in favor of Western countries, and contrary to the interests of developing countries.

China seeks to have these assertions reflected in its foreign policy in order to reform the systems constituting the unjust international order. China’s ambition is to “be actively involved with global governance and the provision of the international public good, enhance ‘institutionalized discourse power’ in global economic governance, and build a broad community of interests.”⁶ “Discourse power” refers to “the influence created by the concepts, logic, values, and ideologies contained within the discussions and discourses of one’s own country.”⁷

To achieve this ambition, one direction advocated by Xi Jinping is to “resolutely reject the Cold War mentality and power politics, and take a new approach to developing state-to-state relations with communication, not confrontation, and with partnership, not alliance.”⁸ This statement is both a criticism of the military alliances that the US has forged around the world and an assertion that the partnerships advocated by China should form the basis of interstate relations. As indicated in Xi Jinping’s speech at the 19th CCP National Congress, China seeks to “strengthen friendship and cooperation with other countries on the basis of the Five Principles of Peaceful Coexistence, and to forge a new form of international relations featuring mutual respect, fairness, justice and win-win

³ 「中共十九届五中全会在京举行：中央政治局主持会议 中央委员会总书记习近平作重要讲话」人民网、2020年10月30日 (<http://politics.people.com.cn/n1/2020/1030/c1001-31911623.html>)。

⁴ 「王毅国务委员兼外长就 2020 年国际形势和外交工作」中华人民共和国外交部 HP、2021 年 1 月 2 日 (<https://www.fmprc.gov.cn/web/wjzbhd/t1844078.shtml>)。

⁵ 「中共十九届五中全会在京举行：中央政治局主持会议 中央委员会总书记习近平作重要讲话」人民网、2020年10月30日 (<http://politics.people.com.cn/n1/2020/1030/c1001-31911623.html>)。

⁶ 「中共十八届五中全会在京举行」『人民日报』2015 年 10 月 30 日。

⁷ 加茂具樹「制度性話語権と新しい五カ年規劃」一般財団法人 霞山会、2020 年 8 月 6 日、(https://www.kazankai.org/politics_list.php?no=0)。

⁸ 「习近平：决胜全面建成小康社会 夺取新时代中国特色社会主义伟大胜利——在中国共产党第十九次全国代表大会上的报告」中華人民共和国中央人民政府 HP、2017 年 10 月 27 日、(http://www.gov.cn/zhuanti/2017-10/27/content_5234876.htm)。

cooperation,” and to “build a community with a shared future for mankind.”⁹ China aims to make its own voice and the voices of other developing countries heard in the unjust governance bodies of the existing Western-centric international system. From this, it can be inferred that China perceives the current international order as being in a period of change, and is actively trying to steer that change.

What is the status of the Middle East region in Chinese diplomacy within this context? In summary, China’s relationship with the Middle East region is, as far as China is concerned, not an important one between great powers, but neither is it one of interest-related peripheral diplomacy. Additionally, China does not consider this relationship as fundamentally affecting its core interests. In that sense, the Middle East region occupies a position of relatively low importance within Chinese diplomacy when compared to its relations with the US, Japan, and other East Asian countries. However, as the author discusses in detail below, the Middle East region is important to China in terms of its continuous economic development and the systemic reform of the international order. It is considering these motives that China is expanding its economic cooperation with the Middle East region and strengthening its military involvement in certain areas in this region.

2. China and the Middle East: Connected by Detached Mutual Support

There are several noteworthy specific characteristics about Chinese diplomacy in the Middle East region. One of these is the mutual regime support based on the Five Principles of Peaceful Coexistence (China’s diplomatic principles). The Five Principles of Peaceful Coexistence are as follows: mutual respect for sovereignty and territorial integrity, mutual non-aggression, non-interference in each other’s internal affairs, equality and mutual benefit, and peaceful coexistence. These principles remain important in present-day Chinese diplomacy, particularly with regard to China’s relations with developing countries. The two most important principles concerning the Middle East region are mutual respect for sovereignty and territorial integrity and non-interference in each other’s internal affairs.

The Middle East region is home to numerous nations governed by authoritarian regimes that face complex domestic ethnic and religious issues. These nations have not established adequate domestic governance. These are issues that are open to criticism and interference from Western countries. Contrastingly, China seeks to minimize conflict and increase cooperation with Middle Eastern nations by turning a blind eye to these issues. In exchange for this detached support, China asks Middle Eastern countries to respect and support China’s position when it comes to its core interests (sovereignty and governance matters concerning Hong Kong, Tibet, the Uighurs, and Taiwan, and its

⁹ 「中国倡导和平共处五项原则」中华人民共和国外交部 HP、2002 年 11 月 7 日、(http://www.fmprc.gov.cn/web/ziliao_674904/wjs_674919/2159_674923/t8987.shtml)。

maritime rights and interests).¹⁰

Second, from the perspective of non-interference in the domestic affairs of others, China levels increasingly severe criticism at Western countries' attempts at regime change and their demands for other countries to adopt universal humanitarian values, while tending to support improvements to the governance capacity of Middle Eastern countries no matter their regime type. For instance, during the Arab Spring of 2011, the Chinese government called for the lawful demands for reform by the people to be respected, while also expressing a basic stance of opposition to interference by outside forces and support for peaceful resolution, as well as cautioning against intervention by external forces and armed rebellion by domestic rebels.¹¹ Underlying this stance was the widely held perception in China that the turmoil wrought by the Arab Spring was fundamentally the result of attempts to import Western models in the countries in the Middle East and the interference of Western powers in these countries' domestic affairs.¹² On the basis of this perception, China appeals for governments across the Middle East to join in unison against terrorism, and positions its support for governance actions such as the maintenance of public order through anti-terrorism measures as an important area of cooperation. A good example of this is the Chinese government's commitment to investing \$300 million in law enforcement and support for police agency training in countries in the Middle East.¹³

Third, China seeks to maintain maximum possible neutrality regarding complex political issues in the Middle East region.¹⁴ By maintaining a certain distance with respect to ethnic, religious, and territorial issues in the Middle East region, China has adopted a cautious strategy to avoid entanglement in regional conflicts while still pursuing its own national interests.¹⁵ In other words, from the perspective of national interest, it is important for China to gain basic support for its core interests from countries in the Middle East, while also maintaining detached relationships that do not entangle China in complex conflicts and confrontations in the Middle East region. Thus, China keeps its hands free by developing partnerships that can be flexibly utilized instead of alliances that create mutual obligations, and also seeks to develop stable relationships across the region as a whole by

¹⁰ 「中国对阿拉伯国家政策文件」新华网，2016年1月13日（http://news.xinhuanet.com/2016-01/13/c_1117766388.htm）。

¹¹ 杨福昌「纪念中阿合作论坛成立十周年」『丝路新编—中阿合作论坛十周年论文集』（世界知识出版社、2014年）13页。

¹² 田文林「中国与中东关系」『中国对外关系（1978-2018）』（社会科学文献出版社、2020年）233, 237页。

¹³ 章遠「一带一路建设与西亚地区合作研究」『“一带一路”建设发展报告（2019）』（社会科学文献出版社、2019年）136页。

¹⁴ 八塚正晃「中国の中東政策—「一带一路」構想における関与の形態」『中東研究』（2017年度、Vol.III）67-82頁。

¹⁵ Andrew Scobell & Alireza Nader, *China in the Middle East: The Wary Dragon*, RAND corporation, 2016, p. 2.

utilizing the multilateral dialogue frameworks shown in the table below.

Table: Dialogue Frameworks between China and Middle Eastern Countries¹⁶

Name	Year of commencement	Details
China-Arab States Cooperation Forum	2004	Annual meeting held between ministers, senior officials, and private sector
China-GCC Strategic Dialogue	1990	A strategic dialogue held at director level since 2010
China-Arab States Expo	2010	Held annually in Yinchuan, China

Fourth, China appears to expect countries in the Middle East to support China’s proposed discourse of international governance reform and expansion of international standards. China’s Arab Policy Paper, released in 2016, states that “Arab states are China’s important partners in following the peaceful development path, strengthening unity and cooperation among developing countries, and establishing a new type of international relations with win-win cooperation at its core.”¹⁷ Few countries in the Middle East have adopted parliamentary democracy, and the dislike toward the US in this region makes it ripe for the expansion of Chinese influence. From this perspective, the Middle East is an important region in terms of strengthening China’s “discourse power (话语权).” The source of “discourse power” is the structural control of discourse spaces through the expansion of Chinese-led international norms and standards. For example, when exporting governance infrastructure to support authoritarian regimes in the Middle East, China is also internationally spreading the “discourse power” of the “Chinese model” in state governance. The Belt and Road Initiative is arguably one element of this practice; it promotes the export of Chinese-made information technology infrastructure to the Middle East region as part of the strengthening of economic relations.

3. Financial Involvement in the Middle East

China has no hesitation about increasing its influence as an economic actor in the Middle East region while retaining a cautious approach to any activity as a political actor in order to avoid entanglement in regional conflicts. Behind this stance is China’s perception that political problems in the Middle East can be solved by economic development. In a speech to the League of Arab States in January 2016, Xi Jinping said that “the key to overcoming difficulties is to accelerate development. Turmoil in

¹⁶ Prepared by the author with reference to 潜旭明「一带一路」背景下中阿关系的新发展」『中东地区发展报告(2015-2016)』(时事出版社、2016年) 88-95页。

¹⁷ 「中国对阿拉伯国家政策文件」新华网、2016年1月。

the Middle East stems from the lack of development, and the ultimate solution will depend on development.”¹⁸ This is underpinned by the logic that supporting economic development in the Middle East will bolster stability across the region, and consequentially protect China’s interests in the Middle East. This idea is fundamentally connected to the Chinese leadership’s logic that “a community with a shared future for mankind” will be built by prioritizing economic development over dispute resolution by force, and by constructing shared interests and reciprocal relationships across the region.

China’s interests in the Middle East region are first and foremost concerned with oil resources. China will continue to need to satisfy its domestic energy demands for its continuous economic development, and a stable supply of crude oil from the Middle East region—which provides the majority of China’s crude oil imports—is growing increasingly important. China has grown increasingly reliant on the global oil market since becoming a net importer of crude oil in 1993. In 2019, China produced 190 million tons of crude oil domestically and imported 500 million tons of crude oil, raising its dependency on foreign crude oil to 70.8%.¹⁹ This external dependency on crude oil will only grow greater as time progresses. Crude oil imports from the Middle East region accounted for 50.7% of China’s total crude oil imports in 2015. A stable supply of crude oil from the Middle East is essential to China’s economic activity.²⁰

However, China also has plans to diversify its economic relations with the Middle East region. For example, Xi Jinping presented the “1+2+3” economic and trade cooperation pattern at the China-Arab States Cooperation Forum in 2014. This is an outlook for economic trade relations based on (1) focus on energy cooperation, (2) dovetailing of infrastructure construction and trade and investment cooperation, and (3) breakthroughs in the three major new areas of nuclear energy, space satellites, and new energy. This gives an indication of the specific business direction of the Belt and Road Initiative in the Middle East region.²¹ This plan signifies support for the diversification of industry in the Middle East region and the diversification of trade relations that have been previously predicated on crude oil. Specifically, oil-producing countries like the Gulf States are becoming increasingly valuable markets for China.

Further, the Digital Silk Road—a component of the Belt and Road Initiative—is also being promoted in the Middle East region. For China to push forward with the international standardization of Chinese

¹⁸ 习近平「共同开创中阿关系的美好未来」人民网、2016年1月22日。

¹⁹ 「2019年我国原油对外依存度70.8%」中国石油新闻中心、2020年3月31日、(<http://news.cnpc.com.cn/system/2020/03/31/001769303.shtml>)

²⁰ 段应林「中啊战屡额对接与国际产能合作研究(2016)」『中国-阿拉伯国家经贸发展报告(2016)』(社会科学文献出版社、2016年)14页。

²¹ 「习近平出席中阿合作论坛第6届部长级会议开幕式并发表重要讲话」『新华社』2014年6月5日(http://news.xinhuanet.com/politics/2014-06/05/c_1111002498.htm)。

standards as part of its plans to strengthen its “discourse power,” it needs to swiftly move ahead with the implementation of technology and infrastructure both in China and abroad to build international credibility regarding Chinese standards. It is this perception that underlies the Chinese government’s drive to expand the development of information technology infrastructure overseas. Since 2017, China has been carrying out a Digital Economic International Cooperation Initiative to advocate for international cooperation with respect to information infrastructure, digitization, e-commerce, and international standardization, and various countries in the Middle East including Saudi Arabia, UAE, and Turkey have participated in this initiative.²² Given the high number of authoritarian regimes in the Middle East, one might take the view that there are grounds for such countries to associate with Chinese information and communications infrastructure like the BeiDou Navigation Satellite System in order to avoid interference from Western countries.²³

4. Military Involvement in the Middle East

Chinese overseas military involvement has also attracted attention in recent years, with reports in the media detailing large-scale escort missions by the Chinese People’s Liberation Army (PLA) during the 2011 Libyan Civil War and the 2015 Yemeni Civil War, and the opening of the Chinese navy’s first overseas military base in Djibouti in 2017.

The principal underlying reason for China’s increasing overseas military involvement is a sense of crisis that turmoil in the Middle East will threaten China’s interests, even while it continues to expand these interests as it deepens its economic involvement in the region. Specifically, the Chinese navy’s escort operations for overseas Chinese during the 2011 Libyan Civil War and the 2015 Yemeni Civil War keenly impressed upon China’s leadership the need for public security capability in the Middle East. For China to secure its overseas interests, it is important for China to not only have political and economic relations with countries in the Middle East but also to prevent the occurrence of situations that might threaten its interests. Additionally, it is important for China to maintain a permanent military presence in the Middle East to deal with the occurrence of similar situations. For these reasons, some voices in China are calling for the country to increase its military involvement by “providing China’s unique international public good to create stability in the Middle East region.”²⁴ This includes strengthening its overseas military presence and the long-range power projection

²² 「《“一带一路”数字经济国际合作倡议》发布」中共网络安全和信息化委员会办公室 HP、2018 年 5 月 11 日 (http://www.cac.gov.cn/2018-05/11/c_1122775756.htm)。

²³ 孙德刚「中国北斗卫星导航系统在阿拉伯世界推广的前景」『中东地区发展报告（2015-2016）』（时事出版社、2016 年）52-53 页。

²⁴ 刘中明「在中东推进“一带一路”建设的政治和安全风险及应对」刘中民·孙德刚主编『中东地区发展报告（2017-2018）』（世界知识出版社、2018 年）、15 页。

capability of its navy, strengthening the construction of supply bases along the Belt and Road route, bolstering China's protection of its overseas interests, and strengthening its capabilities to fulfill its international responsibilities. China is gradually expanding the scope of its previously limited military involvement due to the vulnerability of the Middle East region and China's growing economic interests in this region.

However, China tends to avoid providing conspicuous arms exports and/or directly intervening in conflicts in the Middle East in order to avoid being entangled in regional conflicts. According to the estimates by the Stockholm International Peace Research Institute (SIPRI), Chinese arms exports to the Middle East as a whole have remained muted; China came 15th in a ranking of arms exporters to the Middle East between 2012 and 2016.²⁵

China's military presence in the Middle East is observed through PLA military diplomacy. Military diplomacy uses PLA military cooperation to assist Chinese diplomacy, and has become an important policy tool for China in avoiding being entangled in conflicts in the Middle East.²⁶ China's Arab Policy Paper includes the following on military cooperation in the Middle East: "We will strengthen exchange of visits of military officials, expand military personnel exchange, deepen cooperation on weapons, equipment, and various specialized technologies, and carry out joint military exercises. We will continue to support the development of national defense and military forces of Arab States to maintain peace and security of the region."²⁷

A typical example of Chinese military diplomacy is Chinese navy port calls. Chinese navy port calls in the Middle East first became operational in December 2008 with the deployment of Chinese navy vessels to combat piracy off the coast of Somalia and the Gulf of Aden. The anti-piracy mission comprised a 4-month long-term deployment of two combat ships and one supply ship with total manpower of around 600–800 people. China's aim of this mission was to protect important sea lanes. The mission also served as a training and exercise opportunity to help improve the capabilities of the Chinese navy's open sea operations. China's naval presence in the Middle East was made permanent with the opening of the Chinese PLA Support Base in Djibouti in August 2017; since then, China has expanded the scope of its military diplomacy through activities that go beyond friendly port calls to include joint military exercises.

China is also ramping up exports of civil and military drones (such as the Wing-Loong II and the CH-4) to Gulf States including Saudi Arabia, Iraq, UAE, Egypt, Jordan, and Qatar.²⁸ The Wing-Loong II is a versatile reconnaissance/attack unmanned aerial vehicle (UAV) capable of long-term flight, whereas

²⁵ SIPRI Arms Transfers Database (<http://www.sipri.org/databases/armstransfers/sources-and-methods/>) .

²⁶ 『中国人民解放军军语』(军事科学出版社、2011年)、1063页。

²⁷ 「中国对阿拉伯国家政策文件」『新华社』2016年1月13日。

²⁸ "Saudi Arabia buys high-tech China drones," *Arab News*, September 1, 2016 (<http://www.arabnews.com/node/978446/saudi-arabia>).

the CH-4 can carry short-range laser-guided bombs (LGBs) and precision-guided small diameter bombs (SDBs), making them both suitable for use in armed conflict.²⁹ Reports have suggested that drones from China are being used in actual combat in Saudi Arabia, UAE, and Iraq.³⁰ China is currently working on the military uses of UAVs and AI to prepare for future wars in the form of “intelligentized warfare.” Consequently, the use of Chinese-made UAVs in combat might serve as educational materials for the PLA.³¹

Conclusion

China’s leadership perceives the present as an important period of change in the international order, and is seeking to expand China’s international influence to correct unjust elements of the international system that formed under US hegemony. When it comes to regional order in the Middle East, the question is whether China will be able to take the place of the US as the latter’s influence diminishes in the Middle East region.

While the US has spent 2020 looking inwards, embattled by the COVID-19 pandemic, China has continued to develop its diplomatic relations across the Middle East region. In November 2020, a ministerial videoconference was held between China and the GCC countries to discuss cooperation over COVID-19 vaccines and deadlocked free trade negotiations.³² China also took part in a ministerial videoconference with major European companies to discuss the Iran nuclear issue without the presence of any US representatives.³³ China’s relative presence in the Middle East will surely grow as the US continues to withdraw from the Middle East in the future.

This does not indicate that a US–China conflict will take place in the Middle East. Although bilateral relations between the US and China are deteriorating in various areas, the Middle East does not present many issues that can cause a fundamental conflict between these countries. In fact, they have a relationship of cooperation over aspects such as the stabilization of regional order, the strengthening of public order management, and support for anti-terrorism measures.³⁴ While it is expected that China will continue to gradually expand its military involvement in the Middle East,

²⁹ 『人民網日本語版』2017年3月1日 (<http://j.people.com.cn/n3/2017/0301/c95952-9184131.html>)。

³⁰ Sebastien Roblin, “Chinese drones are going to war all over the Middle East and Africa,” *National Interest*, September 29, 2019.

³¹ 八塚正晃「人民解放軍の智能化戦争」『安全保障戦略研究』第1巻第2号、2020年、15-34頁 (http://www.nids.mod.go.jp/publication/security/pdf/2020/10/202010_02.pdf)。

³² 「王毅出席中国－海合会部长级视频会议」中华人民共和国外交部 HP、2020年11月19日 (<https://www.fmprc.gov.cn/web/wjzbzd/t1830696.shtml>)。

³³ 「王毅就伊朗核问题提出四点主张」人民网、2020年12月22日 (<http://world.people.com.cn/n1/2020/1222/c1002-31974177.html>)。

³⁴ Jon B. Alterman, “China, the United States, and the Middle East,” *The Red Star & the Crescent: China and the Middle East* (C. Hurst & Co.: London, 2018), p. 38, 44.

there are no current signs of significant deviation from activities such as sea lane defense and public order cooperation. The nature of China's military presence in the Middle East is unlike that of the US in that it manifests as "soft military involvement," and it may be possible for the two countries to coexist in the Middle East.³⁵

As long as no conflict arises between US and Chinese interests in the Middle East, it may be possible for China to continue to cooperate with the US over military and security issues in the region. China's government-affiliated media have expressed optimism following the inauguration of the Biden administration, indicating that while the Iran nuclear issue remains a pressing issue, there have been positive diplomatic movements that will help to ease tensions in the Middle East.³⁶

In truth, many of the interests China has identified in the Middle East are shared by Japan. Thus, various measures instituted by China to create stability in the Middle East, such as sea lane defense and anti-terrorism measures, fundamentally align with Japan's interests. However, greater understanding is needed regarding the various risks associated with the implementation of the Belt and Road Initiative. Examples of such risks include infrastructure projects that have the potential to harm the fiscal strength and human rights provision of countries in the Middle East, port construction projects that will bolster China's military presence in the region even further, exports of civil and military weapons that could destabilize the Middle East, and exports of information infrastructure and public security systems to the Middle East that can oppress civil society.

Additionally, China's influence over the discourse in the Middle East concerning maritime issues and Taiwan is growing gradually. The expansion of China's discourse concerning these issues affects Japanese interests. From this perspective, diplomatic efforts will be needed to encourage a balanced understanding of the East Asian situation in the Middle East.

³⁵ 孙德刚「论新时期中国的中东的柔性军事存在」『世界经济与政治』（2014年第8期）4-29页。

³⁶ 「2021年国际形势前瞻 | 中东局势依旧迷离」『解放军报』2021年1月12日（http://www.81.cn/yw/2021-01/12/content_9966504.htm）。

2. China-Gulf Monarchies Relations in the 2020s: Visions and Challenges

Jonathan Fulton

China begins the 2020s as an important power in the Gulf region¹, with deep and multifaceted relations with each of the eight regional states (Bahrain, Iran, Iraq, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates [UAE]). While this has been the case in economic terms throughout much of the 21st Century, its influence in political, security, and cultural matters has also been on the rise. While it may have been possible to describe China's Gulf interests with an oil-for-trade narrative ten years ago², the transition to a fuller set of relations has long been underway, and the process has intensified with the 2013 introduction of the Belt and Road Initiative (BRI).

This is remarkable given the relative speed with which China has moved beyond an extra-regional power of marginal influence in the Gulf. The late 20th Century was a period of consolidation, slowly developing relations with the Gulf monarchies³ between 1971 (Kuwait) and 1990 (Saudi Arabia).⁴ The first two decades of the 21st Century have witnessed a significant upswing.

In the 2000s trade – especially energy trade – drove relations and political coordination. At the same time, relations between the Gulf monarchies and the United States, their most important extra-regional partner, were especially tense given the disastrous invasion and occupation of Iraq, which the monarchies opposed. As a result, outreach to China became more frequent and its regional role began to develop, with a security agreement signed between Beijing and Riyadh during a 2006 state visit from President Hu Jintao. Relations have further developed through two multilateral mechanisms. The first is the China Arab States Cooperation Forum (CASCF), a multilateral platform established in 2004 to strengthen ties between China and the 22 member states of the Arab League. The other is the China - GCC Strategic Dialogue, which was created in 2010.

During the 2010s, deeper ties have been the result of ongoing and intensifying Gulf concerns about the future of U.S. commitments to the region, combined with a more muscular Chinese foreign policy under President Xi Jinping. A series of decisions in Washington have contributed to a fear of abandonment in the Gulf: the casual demise of American support for the Hosni Mubarak regime in Egypt during the Arab uprisings, the announcement of the pivot or rebalance to Asia, an inconsistent

¹ Both the Persian Gulf and Arabian Gulf are contested names, so this paper will instead refer to the region as the Gulf.

² N. Janardhan, "China, India, and the Persian Gulf," in Mehran Kamrava (ed.) *International Politics of the Persian Gulf* (Syracuse: Syracuse University Press, 2011), 207-233.

³ Prior to the the 2017 conflict within the Gulf Cooperation Council (GCC), the "GCC countries" was a useful shorthand to describe the six Gulf monarchies (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE) collectively, although there was always significant variation across them. With the 2017 rupture this shorthand seems less useful. This paper will therefore refer to them as the Gulf monarchies throughout.

⁴ For an overview of this period, see Jonathan Fulton, *China's Relations with the Gulf Monarchies* (London: Routledge, 2019).

Syrian policy, and the lack of a GCC role in negotiating the Joint Comprehensive Plan of Action (JCPOA) with Iran all angered leaders in the monarchies during President Obama's administration. Under President Trump they enjoyed more support but a lack of a coherent regional policy from his administration also was a source of concern. His calls for a total troop withdrawal from Syria and Afghanistan signaled an intention to reduce America's Middle East presence, and his attempt to establish the Middle East Strategic Alliance was perceived as another move towards a reduced MENA role. Pulling out of the JCPOA satisfied several Gulf leaders, but the so-called "maximum pressure" campaign lacked any kind of strategy for dealing with Iran other than trying to force an unlikely regime collapse. The Iranian response targeted the interests of America's Gulf partners, including tanker attacks in the UAE port of Fujairah and in the Gulf of Oman, as well as the spectacular 2019 drone attack on Saudi Aramco facilities in Abqaiq and Khurais. While the U.S. condemned each attack, there was no tangible response, further contributing to a concern about the long-term viability of the U.S. security architecture in the Gulf.

Throughout this decade, Xi Jinping's China has transitioned from the modest foreign policy that it had followed since Deng Xiaoping rolled out the Reform Era in 1978. The 韬光养晦 (*tao guang yang hui*) or 'hide and bide' dictum called for Beijing to "keep a low profile" as a means of easing other countries' concerns of a rising China. During a 2013 meeting on China's diplomacy with countries on its periphery Xi introduced the phrase 奮發有為 (*fen fa you wei*), or "be proactive in seeking achievements", as an updated foreign policy mantra. This was quickly recognized as a shorthand for a more assertive Chinese foreign policy⁵, and became evident with the 2013 introduction of the BRI as the organizing principle of China's approach to developing relations with countries across Eurasia and the Indian Ocean region. The geography of the BRI gave an increased strategic importance to the Gulf region and the Arabian Peninsula, and relations have grown significantly as a result. The 2016 Arab Policy Paper articulated a Chinese approach to the Middle East for the first time, using the 1+2+3 Cooperation Pattern as a means of building a sustainable long-term presence.⁶ Under this framework, 1 represents energy, 2 is infrastructure construction and trade and investment, and 3 is renewable energy, digital economy, and nuclear energy. As Chinese state-owned enterprises (SOEs) and multinational companies won contracts across MENA, this framework has proven to be an important indicator of China's growing interests and influence. Another framework for cooperation was announced in 2018 during a CASCF Ministers' Meeting. The "Industrial Park – Port Interconnection, Two-Wheel and Two-Wing Approach" links Chinese investment in industrial parks

⁵ Yan Xuetong, "From Keeping a Low Profile to Striving for Achievement," *The Chinese Journal of International Politics* 7(2) (2014), 153-184.

⁶ "Full Text of China's Arab Policy Paper," *Xinhua*, January 13, 2016. http://news.xinhuanet.com/english/china/2016-01/13/c_135006619.htm

and ports in the UAE, Oman, Saudi Arabia, as well as Djibouti and Egypt.⁷ This establishes a physical presence for Chinese companies in strategically important locations along the Arabian Peninsula's coastline, linking business clusters and supply chains from the Gulf to the Arabian, Red and Mediterranean Seas.

As a result, the trajectory of China-GCC relations thus far appears impressive. This corresponds with the ambitions both sides have for future collaboration. Despite often grandiose expressions of future cooperation, Chinese and Gulf leaders remain rather pragmatic in developing ties; nobody projects China as a replacement for American power in the Gulf. Instead, it is seen as an important complement to the Gulf monarchies' increasingly diverse group of extra-regional power relationships, albeit one with substantial economic and political power. At the same time both Gulf and Chinese leaders are aware of the very real challenges to the continued growth in their relations – primarily the response of the U.S, which has explicitly called for less cooperation with China from its MENA allies and partners.

1. Visions

To understand the trajectory of China's relations with the Gulf monarchies in the coming decade, it is important to understand how each side perceives the other. This section begins with an analysis of how China is perceived by Gulf actors, and then discusses how the Gulf monarchies are perceived in China. When Gulf leaders consider China, they see an important extra-regional power with long-term interests in the region, a major global economic power, and a source of support in their efforts to diversify their economies. When China considers the Gulf monarchies it sees a major source of energy, an important geo-strategic hub for the BRI, an important influence in global Islam, and a source of contracts for its SOEs and MNCs.

The Gulf Monarchies Look at China

Partnerships with extra-regional powers has long been an important feature of the Gulf monarchies' security and foreign policies. With Iran and Iraq in their immediate region, the monarchies face larger and conventionally stronger states with competing regime types. To cope they adopted a two-pronged approach: cooperation through the GCC (prior to 2017) and dependence on external security relationships. While the UAE and Saudi Arabia have pursued uncharacteristically

⁷ Embassy of the People's Republic of China in the Republic of Malta, "Wang Yi: China and Arab States Should Jointly Forge the Cooperation Layout Featuring 'Industrial Park – Port Interconnection, Two-Wheel and Two-Wing Approach.'" July 10, 2018. <http://mt.chineseembassy.org/eng/zyxwdt/t1576567.htm>

independent and assertive regional foreign policies since the Arab uprisings, partnerships with the U.S. have been the central pillar of each monarchy's defense policy since the end of the Cold War. In the wake of the Iraqi invasion of Kuwait, the U.S. signed defense cooperation agreements with Kuwait, Bahrain, Qatar and the UAE, and it has had a facilities access agreement with Oman since 1980. These agreements have facilitated the construction of a GCC-centered Gulf status quo, with U.S. troops and bases providing a deterrent against Iraqi or Iranian aggression. The asymmetrical nature of these relationships has contributed to a fear of abandonment among the Gulf monarchies, whose leaders have to take seriously the threat of a diminished U.S. commitment. While troop numbers have remained consistent and the U.S. continues to make robust arms sales to the monarchies, regional leaders have been hearing the same message from presidential administrations and congressional leaders from both parties: the U.S. is over-committed. As a result, the monarchies have steadily been diversifying their extra-regional relationships.⁸ The UAE, for example, has signed strategic partnership agreements with China, India, Japan, South Korea, Singapore, Russia, Germany, and Greece in recent years. While none of the GCC countries believe that any combination of states will provide the same type of security that the U.S. does, this diversification provides a small level of security and substantial diplomatic support. Among these extra-regional partnerships, China provides perhaps the greatest potential as a long-term hedge against U.S. reduction; the fact that Washington perceives Beijing as its greatest competitor and has increasingly uses Cold War rhetoric to describe their relationships means that a Gulf feint towards China will likely spur the U.S. to action in support of the monarchies, if for no other reason than to limit possible Chinese gains. Beyond the U.S. element, the fact that China has established partnership agreements with every Gulf state except Bahrain and is the largest regional economic partner also makes it a major extra-regional power. Its BRI and Arab Policy Paper articulate clear policy goals for regional actors, contributing to a perception that China will continue to be an important long-term actor. And of course, the steady growth of its political, economic, and military power has allowed it to transition from a regional power with global interests into a global power. As such, it appears to offer a wider range of benefits than any other extra-regional power other than the U.S.

Another important consideration is how China can support domestic agendas of the Gulf monarchies. Each of them is intensely aware of the vulnerability of their rentier model; other than the UAE none of the GCC states has made a significant move towards a post-energy economy. With a reliance upon a single resource that is perceived to be in sharp decline, the political stability of the monarchies depends on managing the transition to a post-oil economy. All have embarked upon 'Vision' development programs with the goal of building sustainable economies: Saudi Vision 2030, Abu Dhabi Vision 2030, Qatar National Vision 2030, New Kuwait 2035, Bahrain's Economic Vision 2030, and Oman Vision 2040. A common feature in each program is using foreign direct investment and contracting to support the development of indigenous industries. These programs dovetail with the

⁸ See Jonathan Fulton and Li-Chen Sim, *External Powers and the Gulf Monarchies* (London: Routledge 2019).

five BRI cooperation priorities of policy coordination, facilities connectivity, unimpeded trade, financial integration, and people-to-people bonds.⁹ In each of the Gulf monarchies leaders have emphasized the complementary nature of their ‘Vision’ programs and the BRI. Saudi Arabia’s Crown Prince Mohammed bin Salman, for example, described the BRI as “one of the main pillars of the Saudi Vision 2030 which would seek to make China among the Kingdom’s biggest economic partners.”¹⁰ During the 2019 Belt and Road Forum in Beijing the UAE sent a delegation led by Prime Minister and ruler of Dubai Sheikh Mohamed bin Rashid al Maktoum, who signed deals worth \$3.4 billion with Chinese firms investing in Dubai.¹¹ In short, leaders in the Gulf monarchies see the BRI as a means of pursuing their own domestic economic agendas.¹²

Finally, another important consideration for leaders in the Gulf is the perception of China’s rise as a global normative power. The fact that China claims the principle of non-interference in the domestic affairs of other countries as one of its five principles of peaceful coexistence provides an important ideological juxtaposition against U.S. democracy promotion. This is all the more powerful given the perceived crisis of democracy as many Western democratic countries have faced significant domestic political problems while China’s authoritarian government seems to be deftly navigating development and economic challenges. This is attractive in authoritarian Gulf monarchies. That China is seen as a rising power that will not impose political conditions on its partners is an important consideration in understanding the expansion of Chinese influence.

The U.S. and China’s contrasting approaches to COVID-19, the greatest political and economic crisis of our time, reinforces this last point. While the coronavirus broke out in China, the government was able to adopt harsh measures to contain its spread throughout much of China (although clearly not outside of China), and within a few short months was well on its way to economic recovery. The U.S. on the other hand has politicized its response to the virus, further polarizing an already divided country, and has been unable to manage the crisis. By the summer of 2020 China was offering material and experiential support to the Gulf monarchies, building field hospitals in Kuwait and Dubai and cooperating with Saudi Arabia and the UAE in their testing and tracing efforts. China’s Sinopharm has been working with the UAE and Bahrain in its efforts to develop a vaccine, and CanSino Biologics has been trialing a vaccine in Saudi Arabia. In short, the China model is seen as more capable in dealing with COVID-19, further increasing its importance among the Gulf monarchies.

⁹ See National Development and Reform Commission, Ministry of Foreign Affairs, and Ministry of Commerce of the People’s Republic of China. ‘Vision and actions on jointly building Silk Road Economic Belt and 21st-Century Maritime Silk Road’, (2015), available at: http://en.ndrc.gov.cn/newsrelease/201503/t20150330_669367.html

¹⁰ “Fusing Vision 2030 with Belt Road Initiative,” *Arab News*, September 3, 2016, <http://www.arabnews.com/node/979346/saudi-arabia>.

¹¹ “Sheikh Mohammed Announces \$3.4bn Investment in Dubai Via China’s Belt and Road Initiative”, *The National*, April 29, 2019, <https://www.thenationalnews.com/uae/government/sheikh-mohammed-announces-3-4bn-investment-in-dubai-via-china-s-belt-and-road-initiative-1.854063>

¹² Jonathan Fulton, “Domestic Politics as Fuel for China’s Maritime Silk Road Initiative,” *Journal of Contemporary China* 29 (122) (2020), 175-190.

China looks at the Gulf monarchies

China also sees a wide range of interests met through engagement with the Gulf monarchies. The most obvious is a source of oil and liquified natural gas (LNG), both of which China imports in great quantities. China became a net importer of oil in 1993 and since then the Gulf has come to play an important role in its energy security. Despite China's success in diversifying its oil suppliers, Gulf exporters typically account for 40 – 50 percent of China's oil imports, making the region an especially important component of its energy security.¹³ In 2018 the Gulf monarchies collectively sold nearly \$68 billion worth of oil to China.¹⁴ This has increased in the wake of U.S. sanctions against Iran, which resulted in Beijing needing to find a replacement for seven percent of its oil imports and Saudi Arabia picking up the slack.¹⁵ Qatar's role as a global LNG power also features in China's energy calculus. Between 2017 and 2023 Chinese LNG demand is projected to increase by 60 percent as it tries to move towards cleaner energy. Qatar is expected to be China's largest supplier by then, accounting for a projected 28 percent of its LNG imports.¹⁶ In 2018 Chinese LNG imports from Qatar were valued at \$6.9 billion and were 14 percent of its total.¹⁷ Taken together, this makes Gulf energy a significant economic interest for China.

Geography is another consideration when Chinese leaders look to the Gulf monarchies. As discussed above, the BRI must pass through the Middle East, and the monarchies represent the only grouping of relatively stable states in the region. The BRI's overland route, the Silk Road Economic Belt, connects to Iran and Turkey, both Gulf rivals, but importantly neither country enjoys especially strong relations with many of its MENA neighbors. Since the BRI is fundamentally a series of projects designed to capitalize on regional and inter-regional connectivity, the relative isolation of Iran and Turkey make them less useful BRI partners for the time being. The Maritime Silk Road Initiative component of the BRI, on the other hand, is at a more developed stage, with the above-mentioned "Industrial Park – Port Interconnectivity" project linking Arabian Peninsula port cities with the PLAN Support Base in Djibouti and Egyptian ports connecting the Red Sea to the Mediterranean via the Suez Canal. The Gulf monarchies therefore offer substantially more to China in the way of regional and inter-regional connectivity, making them important BRI partners.

Islam is another important consideration for China in its relations with the Gulf monarchies, for both domestic and international reasons. Domestically, China faces significant pressures from its Muslim minorities, especially the Uighurs in Xinjiang, where an estimated 1,000,000 Uighurs have been

¹³ International Trade Center, 'China', continuously updated, available at: <https://www.intracen.org/country/china/>

¹⁴ Chatham House, resourcetrade.earth, continuously updated, available at: <https://resourcetrade.earth/>

¹⁵ Natasha Turak, "Saudi Arabia is Dramatically Changing its Oil Exports to China and the US," *CNBC*, August 15, 2019, <https://www.cnbc.com/2019/08/15/saudi-arabia-dramatically-changing-its-oil-exports-to-china-and-the-us.html>

¹⁶ "China to Become Top Gas Importer in 2019 Boosted by LNG – IEA," *Reuters*, June 26, 2018 <https://www.reuters.com/article/gas-iea/china-to-become-top-gas-importer-in-2019-boosted-by-lng-iea-idUSL1N1TR114>

¹⁷ Chatham House, resourcetrade.earth, continuously updated, available at: <https://resourcetrade.earth/>

detained in what the PRC describes as re-education camps and others describe as internment camps. Facing strong international condemnation for its approach to political Islam, China has found unlikely allies in the Gulf, where governments also see religious ideology as challenges to their governments. When Saudi Crown Prince Mohammed bin Salman visited China in early 2019 and was asked about Xinjiang, he reportedly stated that Saudi Arabia respects “China’s rights to take counterterrorism and de-extremism measures to safeguard national security.”¹⁸ Shortly afterwards 36 Muslim-majority countries, including all of the Gulf monarchies, signed a letter of support for China’s Xinjiang policy. Beyond China’s domestic pressures associated with Islam, cooperation with the Gulf states is also useful in developing the BRI. Passing across several Muslim-majority countries, the BRI will be easier to implement if it is perceived to be working with Islamic traditions. Islamic finance could therefore be an interesting mechanism for increasing cooperation, and in this the UAE is especially useful. Dubai is home to the world’s largest Islamic Sukuk hub with an infrastructure supported by Nasdaq Dubai. Dubai has already cooperated with China on Islamic banking and finance, with an annual China-UAE conference held at Hamdan Bin Mohammed Smart University.¹⁹

Related to the Gulf ‘Vision’ development programs, China also sees the Gulf monarchies as a major source of international contracting for its SOEs and MNCs. Data from the American Enterprise Institute’s *China Global Investment Tracker* shows \$68.12 billion worth of investment and contracting for Chinese firms operating in GCC countries between 2013 and 2019.²⁰ Much of this has been infrastructure construction as the monarchies continue their transition from sparsely populated, largely rural countries to modern urbanized ones. Another factor is the rise in contracting as they implement digital technologies, such as artificial intelligence, fintech, 5G networks, smart cities, and digital commerce, all of which China has a competitive advantage. While infrastructure construction may slow due to the COVID-19 adjustment, the continued march towards a digital economy will continue and Chinese firms can expect to continue tendering lucrative contracts throughout the Gulf monarchies.

2. Challenges

This does not mean to imply that China-Gulf relations do not face challenges. The most significant is and will remain the U.S. As the most important partner for each of the monarchies, the U.S. is an important consideration as they develop stronger ties with China. The deterioration of U.S. – China relations appears to be a structural feature of international politics; the significant gap between their

¹⁸ “Chinese President Meets Saudi Crown Prince,” *Xinhua*, February 22, 2019, http://www.xinhuanet.com/english/2019-02/22/c_137843268.htm

¹⁹ “The China-UAE Conference on Islamic Banking and Finance,” *Dubai Center for Islamic Banking and Finance*, <https://www.dcibf.ae/content/china-uae-conference-islamic-banking-and-finance>

²⁰ China Global Investment Tracker, American Enterprise Institute, continually updated, <https://www.aei.org/china-global-investment-tracker/>

preferences for international political order and norms presents a major hurdle in maintaining a cooperative relationship. Under the Trump administration the BRI has been countered with a more muscular approach to the Indo-Pacific, with security cooperation between the Quad of Australia, India, Japan and the U.S. in the early stages of balancing China in the Indian Ocean region.²¹ The 2017 U.S. National Security Strategy framed competition with China in binary terms, stating, “A geopolitical competition between free and repressive visions of world order is taking place in the Indo-Pacific region.”²² With this Cold War redux narrative, states with close ties to both the U.S. and China will have to strike a delicate balance. For the Gulf monarchies, as with many other countries across Eurasia and the Indian Ocean, there is little interest in becoming a theatre of great power competition, and the approach thus far has been to diplomatically wait to see if a Biden administration adopts a different approach to a China policy that is unlikely to fundamentally change.

Beyond U.S.-China competition, regional tensions in the Gulf region also pose a challenge. This also can partly be attributed to a changing U.S. Gulf policy, as regional leaders respond to American behavior. The ‘maximum pressure’ campaign against Iran has resulted in aggression from Tehran, which threatens to destabilize an already shaky status quo. At the same time, it has resulted in some Gulf monarchies actively reaching out to the Iranians in an attempt to lessen tensions. The Trump administration’s response to the GCC crisis in 2017 has also contributed to a less stable region. While the GCC has always been a less unitary organization than it appeared, U.S. leadership supported an order that allowed them to work together. President Trump’s support for the isolation of Qatar was contradicted by the Department of Defense and State Department, and within months the president changed course as well. However, the lack of leadership and brief support for the conflict resulted in a GCC split that more than three years later shows no sign of being resolved. A weakened GCC combined with an even more isolated and aggressive Iran contribute to a Gulf regional order that faces real potential for greater instability, which in turn could affect China’s substantial regional interests and lead to a recalibration of its approach to the Gulf.

Another challenge is China’s difficult relationship with Islam. As described above, the Gulf monarchies have thus far not condemned China’s actions in Xinjiang or publicly expressed concern. However, it is seen as a potential wedge issue to affect China – MENA relations, and as China’s relations with Western liberal democracies continues to deteriorate, it is likely that Xinjiang will feature more significantly in their discussions about China with MENA interlocutors. It likely will not strain Gulf relations with China, but it is an issue that is hard to avoid.

²¹ For a discussion of how these competing approaches to the Indo-Pacific may affect the Gulf region, see Jonathan Fulton, “The Gulf Between the Indo-Pacific and the Belt and Road Initiative,” *Rising Powers Quarterly*, Vol. 3 No. 2 (2018), pp. 175–193.

²² 2017, National Security Strategy of the United States: The White House, 2018, p. 45. <https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>.

Conclusion

Taking stock of the visions and challenges in China-Gulf relations, the trajectory for the coming decade appears to indicate a continuing expansion of Chinese interests and influences on the Arabian Peninsula. There remain significant challenges and the potential for U.S.-China competition to play out in the Gulf should not be minimized. However, the Gulf monarchies are skilled at navigating competition between extra-regional powers and they will likely find several opportunities to advance their own interests as Washington and Beijing struggle for influence. The most significant challenge for the Gulf monarchies will be to maintain this balance in such a way that does not result in the Gulf becoming a theatre of great power competition.

3. オマーンの財政危機がもたらす地政学的課題—中国の接近と隣国の浸透の検討

Oman: Fiscal Crisis and its Geopolitical Challenges

堀抜 功二 (HORINUKI Koji)

Summary

This paper examines the issues surrounding Oman's stability and autonomy, a critical geopolitical center in the Middle East. The Sultanate of Oman has long enjoyed steady development since its establishment under Sultan Qaboos bin Said (reigned 1970-2020). Although Oman is a Gulf Cooperation Council (GCC) member, a security cooperation organization for the Gulf region, it maintained a relatively neutral stance in its foreign and security policies.

However, Oman is currently facing severe financial difficulties, raising concerns about its political and economic stability. Although Oman produces oil and natural gas, its reserves and production are small compared to neighboring countries: the proven oil reserves will deplete in 15 years. Furthermore, the long-term slump in oil prices since 2014 and the effects of the COVID-19 disaster brought Oman's finances closer to the brink of crisis every year. On the one hand, external debt continued to rise; on the other hand, its sovereign rating was continually downgraded, creating financing problems.

Consequently, Oman has no other choice but to rely on borrowing from outside the country. In addition to issuing government bonds, Oman has two significant sources of aid: China and the GCC countries. Based on the One Belt, One Road Initiative, China's Xi Jinping is working to develop the "Silk Road Economic Belt," which runs from Central Asia to the Middle East and Europe, and the "21st Century Maritime Silk Road Initiative," which runs from Southeast Asia to South Asia, the Middle East, Africa, and Europe. Oman is geographically part of the Silk Road of the Sea, and Chinese investment in Oman has been accelerating. The second source is the GCC and its member states. When the Arab Spring occurred in 2011, Oman received \$10 billion in aid from the GCC to deal with the people's demands. Since then, Oman also received financial and development assistance and direct investment from individual GCC countries.

At first glance, the international community is more wary of China's support for Oman than that from the GCC. Because China's economic and development assistance gained a negative reputation among some Asian and African countries as "debt-trap diplomacy," given this context, China's proximity to Oman is understandably alarming, and many commentators expressed concern about China's growing influence. However, while the fears of China's influence are understandable, the diplomatic and economic penetration of the GCC states, especially its neighbors, the UAE and Saudi Arabia, is more likely to affect Oman's diplomatic autonomy than distant China.

Oman is an important country for the stability of the Middle East. Therefore, Oman's financial problems and the decline in its diplomatic autonomy are likely to harm regional affairs. It is crucial for the international community, including Japan, to strengthen its support for Oman. Likewise, rather than viewing China's approach to Oman as a threat, it is better to cooperate with China to support Oman to contribute to regional stability in the Middle East overall.

はじめに

本稿は、中東の地政学的要衝であるオマーンの安定性と自律性をめぐる課題について検討するものである。オマーンは長らくカーブース・ビン・サイード・アール・サイード国王（在位 1970～2020 年）の安定した統治により、建国以来順調に発展を遂げてきた。またオマーンは湾岸地域の安全保障協力機構である湾岸協力会議（GCC）の加盟国でありながら、外交や安全保障政策においては比較的中立的な立場をとってきたこともあり、これまで大きな紛争に巻き込まれることはなかった。

しかしながら、現在のオマーンは深刻な財政難に直面しており、同国の政治的・経済的な不安定性に懸念が集まっている。オマーンは石油・天然ガスの生産国ではあるものの、もともと資源埋蔵量および生産量が周辺国と比べても小さく、あと 15 年後には石油の確認埋蔵量が枯渇する計算である。さらに 2014 年以降の長期的な油価低迷とコロナ禍の影響により、オマーン財政は年々危機的状況に近づいてきた。対外債務も増加の一途をたどっており、他方でソブリン格付けは引き下げが続いており、資金調達にも問題が生じている。オマーンの外交的自律性と地政学的な重要性は、同国の安定性によって支えられてきたと言っても過言ではない。したがって、オマーンの財政危機が国内外や地域情勢にもたらす影響は少なくないのである。オマーン政府は外国からの投資を呼び込んで脱石油経済構築を進めようとしたり、財源の多角化を通じた財政安定化に力を入れたりしているものの、問題は簡単には解決しない。

そのため、オマーン財政は国外からの借り入れに頼らざるを得ない状況にある。国債発行を除くと、オマーンに対する主要な援助元は二つある。第一に中国であり、第二に GCC 諸国である。中国の習近平政権は「一帯一路イニシアチブ」（One Belt and One Road Initiative）にもとづき、中央アジアから中東、欧州に至る「シルクロード経済ベルト」と、東南アジアから南アジア、中東、アフリカ、欧州へ至る「21 世紀海のシルクロード・イニシアチブ」の整備を進めている。オマーンは地理的に「海のシルクロード」に含まれており、近年中国による投資が加速している。オマーンに対するもう一つの援助元は、GCC およびその加盟国である。2011 年の「アラブの春」が起きたとき、オマーンは対応のための財政的な余力が乏しかったため、GCC から 100 億ドルの援助を受けた。またそれ以降も、個別の GCC 諸国から経済・財政・開発支援を受けている。

一見すると、国際的には GCC の対オマーン支援に比べて、中国のそれの方が警戒されている。なぜなら、中国の経済・開発支援は一部のアジア・アフリカ諸国の間では「借金漬け外交」（debt-trap diplomacy）として悪評が広まっているからである。実際、中国は開発に必要な資金を途上国政府に貸し付けるものの、返済が難しくなった場合、プロジェクトの運営権や資産を事実上差し押さえている。また、中国によ

る開発支援は地元に必要な雇用を生み出さないとの批判もある (Chellaney 2017)。このような文脈を踏まえると、オマーンに対する中国の接近が警戒されるのは無理もなく、多くの論者が中国の影響力の拡大に懸念を示している (Chaziza 2019; Lons 2019; Smith n.d.ほか)。ただし、筆者はその懸念を理解する一方で、疑問も有している。むしろ、遠くの中国より近くの GCC 諸国、とりわけ隣国である UAE やサウジアラビアの浸透の方が、オマーンの外交的自律性に影響を与えるのではないだろうか。以下では、オマーンに対する中国と GCC 諸国の支援を整理しながら、同国の地政学的立場に与える影響を検討していく。

1. オマーンの安定性をめぐる諸問題

1.1. オマーンの地政学的重要性と独自外交

オマーンはアラビア半島東部に位置しており、ホルムズ海峡、オマーン湾、アラビア海に面しており、インド洋へのアクセスも良い。多くの GCC 諸国は不安定なチョークポイントとして知られるホルムズ海峡を通じてエネルギー資源を輸出しなければならず、外洋に直接面するオマーンはエネルギー安全保障の面で優位性を誇っている。また、オマーンでは現在開発が進められているドゥクム港には、大型船舶の修繕が可能なドライドックがあるため、軍事的にも重要である。このように、オマーンはアラビア半島から南アジアにおいて地理的・地政学的重要性を有している。

オマーンで特筆すべき点には、中東地域における外交的な役割がある。オマーンは前述の通り GCC 加盟国であり、外交・安全保障政策では関係国と共同歩調をとっている。その一方で、独自の外交も展開している。とりわけ、外交的な中立性を維持しながら様々なアクターと全方位にわたり交流を持ってきたことである。周辺国はもとより、イスラエルと 1979 年に和平条約を結びアラブ諸国から断交されたエジプトや、「アラブの春」後のシリア内戦の拡大により地域的・国際的な非難を浴びたアサド政権とも、外交関係を維持してきたのである (Almajdoub 2016)。また、オマーンは 1990 年代からイスラエルと非公式の外交関係を維持してきたことも重要である。当時、GCC 諸国を含む多くのアラブ諸国がイスラエルと国交を樹立していないなかで、オマーンはいち早く同国と交流を持った。1993 年のオスロ合意締結をきっかけに、オマーンに中東淡水化研究センターが設置され、ここにイスラエル代表が駐在するようになったのである。その後、1994 年にイスラエルのラビン首相がオマーンを訪問し、1996 年にペレス首相が、そして 2018 年にはネタニヤフ首相が同国を訪れた。ただし、このことはオマーンがパレスチナ問題を軽視していることを意味しない。むしろ、イスラエルとの交流の窓口となることにより、パレスチナ問題の解決に向けた外交的な影響力を持とうとしていたのである。

オマーンの独自外交は、地域における紛争解決にも重要な役割を果たしてきた。もっとも大きな成果をあげたのは、2015 年にイランと P5+1 (米国、英国、フランス、ロシア、中国) および EU の間で締結された包括的共同作業計画 (JCPOA)、いわゆる「イラン核合意」の締結に向けた支援である。カーブス国王はイランと米国を仲介し、またオマーンへ関係者を招くべく秘密交渉の場所を提供した。また両国指導者に直接働きかけるなどして、歴史的な核合意の締結を支えたのである (Almajdoub 2016)。オマーンが米国とイランの仲介が可能であったのは、ひとえに両国と緊密な関係を維持しており、かつ GCC 諸国、とりわけイランと敵対するサウジアラビアからも外交的な自立性を有していたからに他ならない。

1.2. オマーンの安定性をめぐる問題

カーブース国王の50年にわたる治世は2020年1月で幕を閉じ、ハイサム・ビン・ターリク国王の時代が始まった。カーブース国王は、前サイド国王の鎖国時代から脱するべく、国家建設と近代化を進めた。国民は石油収入の恩恵を十分に受けることができ、カーブース国王の集権的な支配も正当化されてきた。「アラブの春」に際しても、国民から政治改革を求める声は上がったものの、カーブース国王の国民的な人気もあり、体制打倒を訴える動きにまでは至らなかった。しかしながら、その後オマーンを取り巻く状況は大きく変わっており、後継者となったハイサム国王はさまざまな問題に直面している。

ハイサム国王は国王就任後、財政改革と政府行政機構の効率化、経済多角化、雇用の創出などを国民に約束した。ハイサム国王は政策の方針として、国民人口の6割を占める若年層を重視する姿勢を示している。オマーンは周辺のGCC諸国とは異なり、石油収入の先細りが避けられないため、経済多角化と雇用の創出は喫緊の課題なのである。そのため、ハイサム国王は国家開発戦略である「オマーン・ビジョン2040」の推進に力を入れている。しかしながら、国王就任後に新型コロナウイルスが蔓延し、原油価格は大きく下落した。さらには国内でも経済活動の縮小を余儀なくされてしまい、新政権にとっては最悪の船出となったのである。

外交方針に関しては、ハイサム国王はカーブース国王の外交路線を踏襲することを表明した。すなわち、近隣諸国との平和的共存にもとづく外交であり、他国の内政に干渉せず、国家主権を尊重し、さまざまな分野で国際協力を行うことを確認したのである。さらに、紛争を平和的手法で解決することを呼びかけ、それに貢献することを誓った。ただし、隣国のUAEやサウジアラビアは「アラブの春」後に拡張主義的な地域戦略を展開しており、それはオマーンにとっても少なからぬ安全保障上の脅威となっている。

そして、今日のオマーンが抱えるもっとも深刻な問題は財政状況である。オマーンは国家歳入に占める資源収入の割合が70%前後と高く、資源価格の変動に対して極めて脆弱である。原油価格が2014年中ごろから低迷するようになると、同国の財政状況は急激に悪化し始めた(図1)。さらに2020年の新型コロナウイルスの世界的な流行は、国際的なエネルギー需要の減退と原油価格の下落を招いたことも、財政状況の悪化に拍車をかけた。その上、オマーンの資源可採年数は石油が15.2年、天然ガスが18.3年である(BP2020)。オマーンはもはや、資源収入だけに頼ることはできないのである。政府は財政赤字を補てんするため、国営企業の民営化や在外資産の処分、対外的な借入れを進めている。政府債務は対GDP比で15%(2015年)から60%(2019年)にまで急激に悪化している。しかしながら、財政状況の悪化と対外債務の増加により、オマーンのソブリン格付けが低下しており、オマーン政府発行の債券は「ジャンク」(投資不適格)の扱いを受けている。そのため、対外的な借入れを増やそうとしても、金利負担が重く押し掛かってしまうことになる。

ハイサム国王は財政再建のため、2020年度には二度にわたる歳出削減を実行した。さらには、政府財政における非石油収入の拡大にむけて、これまで延期していた付加価値税(VAT)の導入を2021年4月に行うことを決めた。そして、レンティア国家としては「禁じ手」である個人向け所得税の導入も検討しているのである。このような財政的な不安定さは、オマーンの地政学的な重要性と外交的な自立性を侵食し始めている。



図 1. オマーン財政状況の推移（2014～2021 年）

出所：National Center for Statistics and Information より作成

2. 中国の「一帯一路」イニシアチブとオマーンへの接近

2.1. 急発展するオマーン・中国関係

中国は 21 世紀に入り、中東へのアプローチを強めている。安価な中国製品が中東市場を席卷するようになり、多数の中国商人が中東諸国でビジネスに従事している。また GCC 諸国では中国系建設企業が大型プロジェクトを受注するようになり、設計から建設、運営まで関わるケースが増えている。中国のプレゼンスは経済だけに留まらない。習近平政権（2013 年～）下では、中東諸国との外交・安全保障関係が強化されているのである。中国は全石油輸入量の 44% を中東諸国から輸入しており（EIA 2020）、エネルギーの安定供給のために同地域との関係強化は不可欠なのである。また同政権が「一帯一路イニシアチブ」を採用するなかで、中東の戦略的重要性が飛躍的に高まったのである。

オマーンと中国の関係に目を移すと、両国は 1978 年に国交を樹立し、そこから二国間関係が始まった。1983 年には、オマーンは中国に石油を輸出した最初のアラブ国家となり、1997 年には中国への天然ガス輸出を開始した。両国の関係は経済的関心、とりわけエネルギーの輸出入を通じて発展してきた（Chaziza 2019）。今日、中国はオマーンにとって最大の石油の輸出先であり、2011 年には輸出量の 58%（1 億 2280 万バレル）を占めていたのが、2019 年には 88%（2 億 4330 万バレル）にまで増加した（National Center for Statistics & Information 2020）。一方で、中国にとっては多数ある輸入元の一つであり、第 6 位（7%）を占めるに留まっている（EIA 2020）。また液化天然ガス（LNG）については、オマーンの輸出量の 10.6%、中国の輸入量の 1.8% を占めている（BP 2020）。とはいえ、オマーンから輸出されている石油と天然ガスは、中国の旺盛なエネルギー需要の一端を支えていることには変わらない。二国間の貿易関係を見ると、エネルギー輸出額が大きく、オマーンの圧倒的な輸出超過である。

一方でオマーンにとっては、中国との経済関係が深まっており、近年では中国から財政支援を受けている。オマーン政府は 2017 年 8 月、財政赤字の補てんのために中国の銀行団から 35.5 億ドルの融資を受

けた (Tillman, Jian, and Qing 2019)。また、オマーン政府は国営企業など優良資産を中国に売却することにより、資金調達を試みている。Oman Electricity Holding Company (Nama) は 2019 年 12 月、同社が所有する配電会社の Oman Electricity Transmission Co. の株式の 49% を、中国の State Grid Corporation of China へ 10 億ドルで売却した (Reuters, December 15, 2019)。

そして、オマーン政府は経済開発戦略「オマーン・ビジョン 2020」および「オマーン・ビジョン 2040」に沿う形で、経済開発とインフラ整備に力を入れている。ここでも中国からの融資や経済支援を受けている。習近平政権も一帯一路イニシアチブの一環として、オマーンの地政学的重要性を高く評価しているため、両者の利害は一致した。2018 年 5 月には、オマーンと中国は一帯一路イニシアチブに関する MoU を締結した。オマーンは「21 世紀海のシルクロード・イニシアチブ」において、紅海からジブチ、東アフリカ、パキスタン、ペルシア湾、インド洋の結節点に位置しているため、中国側の関心も高い。とくに中国は後述するようにドゥクム港の開発支援に力を入れているが、同港はアラビア海に面しており、またドライドックを擁していることから、中国軍の海洋進出にとっても重要な場所である。

またオマーンは中国が主導するアジアインフラ投資銀行 (AIIB) にも創設メンバー国として参加し、インフラ開発の支援を受けている。AIIB は 2016 年にドゥクム港湾インフラ開発に 2 億 6500 万ドルを融資したことを皮切りに、鉄道システム開発に 3600 万ドル (2016 年)、ファイバー・ブロードバンド網整備に 2 億 3900 万ドル (2017 年)、イブリー II 太陽光発電 IPP プロジェクトに 6000 万ドル (2020 年) の融資を発表している (Smith n.d.)。民間レベルでも、中国系企業コンソーシアムの Oman Wanfang がドゥクム港の工業地帯建設プロジェクトに 107 億ドルを投資することを発表している。このプロジェクトのなかには、重工業やホテル、病院、学校の建設計画も含まれている (Reuters 23 May, 2016)。また最近では、米国の懸念をよそに中国の Huawei がオマーン国内の 5G ネットワークの整備事業に参入することも決まるなど、中国企業の進出は著しい (Zinser 2020)。

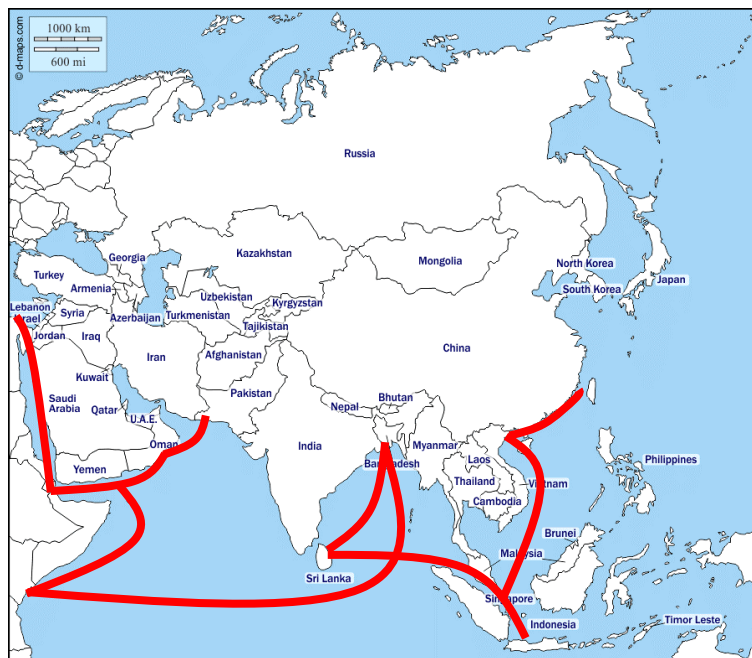


図 2. 中国「21 世紀海のシルクロード・イニシアチブ」の広がり

出所：諸資料をもとに筆者作成

2.2. 「債務の罠」の罠？

このように、オマーンと中国の関係は急発展しているが、両国はそれぞれの思惑を有しており、相互依存関係が築かれはじめている。しかしながら、オマーンに接近する中国に対しては、国際社会が警戒感を示している。しばしば、一帯一路イニシアチブによる中国の地政学的影響の拡大は西側諸国によって警戒されている。とりわけ、中国が開発・金融支援を通じて途上国を取り込み、影響力を行使する様子は「債務付け外交」と呼ばれている。アジアやアフリカ諸国において、対中国債務の増加によって身動きが取れない国が出てきていることは事実である一方で、受入国政府のガバナンスの問題が多分にあることも指摘されている（Jones and Hameiri 2020）。たとえば日本政府のなかでも中国に対する懸念が表明されており、2017年頃には河野太郎外相や佐藤正久外務副大臣（いずれも当時）が、ドゥクム港への中国の進出について言及している（村上 2018）。また駐オマーン日本国大使の齊藤貢大使（当時）も、中国がドゥクム港周辺で広大な土地を確保していることについて「巨額の投資は将来の軍事利用を視野に入れているからではないか」と発言している（日本経済新聞, 2018年7月25日）。

むろん、国際政治において中国のパワーは増大しており、アジアから中東、アフリカ地域一帯に与える影響も計り知れないものになっている。また、中国は様々な政治的・戦略的意図をもってこれらの地域にアプローチしているため、国際社会の懸念も理解することができる。その一方で、中国の対オマーン投資は「オマーン・ビジョン 2040」の目的、すなわち経済・産業の多角化を支えており、財政難に苦しむオマーンを支えていることも事実である。その意味では、中国の対オマーン支援は同国の安定に資するものであるとも評価することが可能である。また、中国の対オマーン支援や投資は、インフラ計画など比較的目立ちやすいものに行われているため、国際社会からの耳目を集めやすい。しかしながら、対オマーン直接投資を見ると、中国が占める割合は5%程度であるため、オマーンを経済的に「支配」するまでには至っていない（図3）。

さらには、中国のオマーン進出が安全保障上の脅威となっているとする見方についても、やや誇張されるきらいがある。オマーンは英国とインドにドゥクム港への軍の利用を認めており、仮に中国軍の利

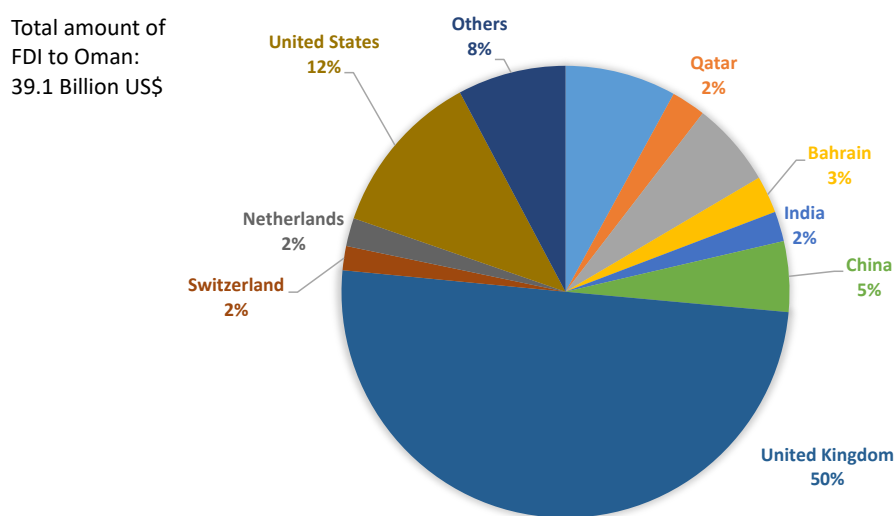


図3. 対オマーン直接投資（2020年第1四半期）

出所：National Center for Statistics & Information

用が認められたとしても、中国がこれを完全に支配下に置くわけではない（村上 2018）。そもそも、オマーンは米国の同盟国でもあり、米軍も有事の際にはオマーンの基地を利用することが可能である。むしろ、インド洋から東アフリカ、紅海にかけての中国の軍事進出という文脈で考えるとそのプレゼンスを無視することはできないが、オマーンそのものが中国に飲み込まれる危険性は、現状においてそれほど高くはない。

3. GCC 諸国——兄弟国か、潜在的な脅威か？

3.1. GCC 諸国の対オマーン支援

オマーンは GCC の加盟国として地域政策や安全保障政策、治安、経済政策において協調的な立場をとっている。ただし、オマーンは自国の国益に沿わないと判断した場合には、GCC の中心国であるサウジアラビアや UAE と異なる立場をとることもある。たとえば 2015 年 3 月にサウジアラビアを中心とするアラブ有志連合軍が対イエメン作戦を開始した際、オマーンは GCC 諸国のなかで唯一軍を派遣しなかった。また 2017 年 6 月にサウジアラビア、UAE、バハレーン、そして GCC 外のエジプトがカタールと断交した際も、オマーンはこれを支持しなかった。

とはいえ、オマーンにとって GCC は自国の生存を支える重要な地域フォーラムである。「アラブの春」が発生した際、オマーン国内では 2011 年 1 月頃からマスカトやソハール、サララなどの主要都市で政府への抗議活動が行われた。人々は政府に対して、政治改革や汚職・腐敗の撲滅、社会保障の拡大、雇用創出を要求した。この時、カーブース国王は漸進的な政治改革と経済・社会保障の拡充を通じて民衆の要求に応えた。さらに、オマーンは GCC 開発基金を通じて 100 億ドルの経済支援を受けている（堀抜 2012）。財政基盤の脆弱なオマーンにとって、GCC からの支援は民衆への経済的な要求に応えるために非常に重要なものであった。また、仮にオマーンで政変が起こり、君主体制が崩れてしまうと、その影響が周辺国に波及することは必至であった。そのため、GCC にとっても必要な支援であったのである。

オマーンに対する財政支援は、個別の GCC 諸国からも行われている。アメリカン・エンタープライズ

Total amount of Financial Aid and FDI to Oman: 28.2 Billion US\$

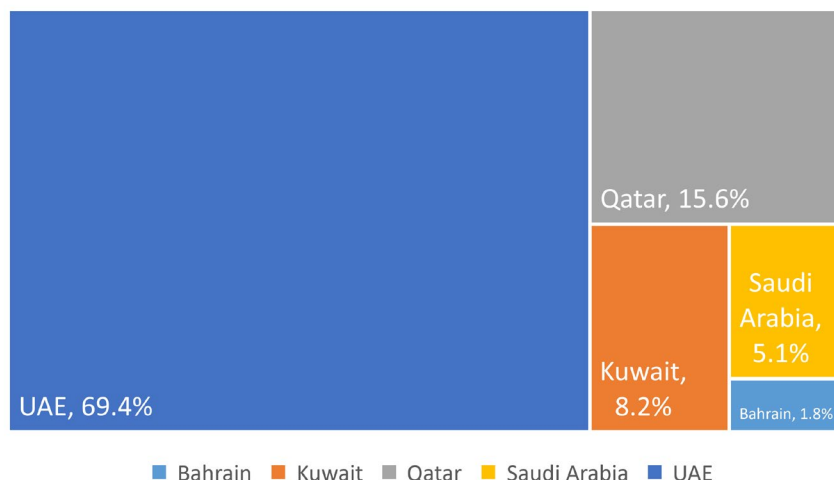


図 4. GCC 諸国の対オマーン財政支援・直接投資額（2003 年～2020 年 12 月）

出所：American Enterprise Institute “Gulf Financial Aid and Direct Investment Tracker”より作成

公共政策研究所が公表しているデータセットによると、湾岸の 5 カ国からオマーンに流れる財政支援および直接投資の総額（2003 年～2020 年 12 月）は 282 億ドルを超えており、2011 年と翌 2012 年にその金額は急増した。また財政支援および直接投資の約 7 割は、UAE からの直接投資であり、その大半は民間ベースの直接投資である（図 4）。金額についてはオマーン国立統計・情報センターが公表する対外直接投資残高（図 3）と必ずしも整合的ではないが、オマーンの隣国である UAE の進出ぶりが突出している。同時に、このことはオマーン経済が UAE からの投資に大きく依存している状況も示している。

オマーンは「アラブの春」後に財政状況が悪化し、前述のとおり中国から借り入れや支援を受けている。さらに、GCC へも追加の借り入れを打診している。2020 年 6 月にオマーンと GCC 諸国の財政支援に向けた話し合いについて報じられると、オマーン政府は 8 月に First Abu Dhabi Bank と Bank Muscat のアレンジにより 20 億ドルのブリッジローンを調達した（Reuters, August 12, 2020）。また同年 9 月、カタールより 100 億ドルの財政支援も受けたのである（Financial Times, September 29, 2020）。

3.2. 隣国の浸透

前節で論じたように、現在のオマーンは GCC 諸国からの支援を必要としており、それなしには同国の経済・財政は維持できず、ひいては政治・社会情勢のさらなる不安定化が進むことになる。ただし、GCC 諸国のなかでもクウェートやカタールはオマーンに対して友好的であり、これらの国からの支援がオマーンの外交・安全保障上の脅威になる可能性は低い。しかしながら、隣国のサウジアラビアと UAE はオマーンにとって治安・安全保障上の脅威となっている。ムハンマド・ビン・サルマーン・サウジ皇太子とムハンマド・ビン・ザーイド・アブダビ皇太子の主導の下で拡張主義的な対外戦略を展開しているため、両国から過度な財政支援を受け入れることは、オマーンの自律性を侵食しかねないのである。

近年のアラビア半島情勢を振り返ると、オマーンは両国との間で様々な問題を抱えている。サウジアラビアとの間では、イエメン東部のマフラ県の権益をめぐる摩擦が起きている。マフラ県はオマーンのドファール地方と面しており、双方の間には歴史的・文化的・部族的な一体性があった。しかしながら、イエメン戦争が始まると、サウジアラビアはマフラ県に 1500 名規模の軍を派遣しており、地元勢力の訓練も施すようになった。サウジアラビアはさらに、同国南部のハルヒールからイエメンのマフラ県を通過し、アラビア海に面したニシュトゥンに通じる石油パイプラインの建設を計画している。これに対して、オマーン側はサウジアラビアのマフラ県進出を治安上の脅威であると見なしており、マフラ側を支援するとともに、サウジアラビアに対して強い姿勢で臨んでいる（The Independent, August 31, 2019）。

また UAE との間では、2011 年と 2018 年に同国のスパイ網がオマーン国内で摘発されるという事件が起こった。オマーン側は、UAE のスパイ網がオマーンの政府システムを標的にしていたと主張したが、UAE 側はこれを否定した。しかしながら、クウェートのサバーフ・アル=アフマド首長の直接の仲介により、UAE 側が謝罪し、この問題は解決したかのように見られた。しかしながら、2018 年 11 月には再び UAE のスパイ網がオマーン国内で摘発されたのである（Sheline 2020）。また UAE はホルムズ海峡に面するオマーン領ムサンダム半島にも触手を伸ばしているとの指摘もある。UAE がオマーンのムサンダム半島周辺や国境付近で UAE が土地を購入していることが明らかになり、カーブス国王は 2018 年に外国人による国境付近の土地取得を禁止した。

サウジアラビアと UAE の両国は、イランに対する敵対的な姿勢をとり、またイエメン、アフリカの角、紅海周辺、東地中海、そしてリビアにおいて外交・軍事行動を活発化させていることも、小国オマーンを

不安にさせている。前項で指摘したように、オマーンにとって GCC からの財政援助や投資は同国が生き延びる上で重要であるものの、同時に過度な受け入れは特徴的な外交上の自立性を縛ってしまう恐れがある。さらには、ムサンダム半島やイエメンのマフラ県など、オマーンにとっての戦略的要衝が揺るがされることになる。したがって、オマーンにとっては、国際社会が懸念する中国の接近よりも、隣国との衝突と浸透の方が、より具体的な脅威であると言える。

おわりに：オマーンの自律性と安定性をめぐる国際支援の課題

これまで見てきたとおり、オマーンは小国でありながらも中東・湾岸情勢に対して独自の影響力を有する国であった。とくに仲介外交で実績を残しており、湾岸情勢のカギを握るイランとも良好なパイプを有している。そのため、バイデン政権が再開を示唆する核交渉に対しても、米国とイランの仲介役となることが期待されている。またオマーンは中東域内において中立的な国としても、イエメンやシリア、パレスチナなど紛争国・地域での仲介・調整役を担うことができるだろう。

しかしながら、オマーンの外交的・安全保障的な自立性は、現在危機に直面している。油価の低迷と支出増大に伴う財政赤字の発生と、対外的な借り入れ増加による債務負担の増加により、オマーンの家計は急激に悪化しているからである。オマーンは財政に占める資源収入の割合を減らすべく、経済および財源の多角化を進めようとしているが、経済開発を進めるだけの原資が十分でない。そこで、海外からの直接投資を集めようとしているが、近年では中国と湾岸諸国の対オマーン直接投資が活発化している。また、両者は財政支援も行っており、オマーンはこれによって何とか生き延びているのである。

ただし、中国にしても湾岸諸国にしても、支援に際しては何らかの政治的な意図をもっており、支援の規模によってはオマーンの外交的な自由度を将来的に制限しかねない点には注意を要する。現時点においては、中国の対オマーン接近は国際社会が懸念するほど深刻であるとは言えない。むしろ、隣国のサウジアラビアや UAE の外交・安全保障面における圧力と経済的な浸透の方が、オマーンにとって重大な問題になる可能性がある。

オマーンが今後も外交的な自律性を維持し、中東・湾岸地域の安定を支えるためには、国際社会が同国の地政学的重要性を再確認し、手厚い支援を行っていくことが必要になる。開発援助委員会 (DAC) の基準によると、オマーンは 2007 年に高所得国になり、2011 年に政府開発援助 (ODA) の対象から外れた。そのため、先進国からはオマーンに対して ODA を供与することはできない。日本では、JICA が GCC 諸国に対して「コストシェア技術協力 (有償技術協力)」を導入しているが、オマーンでの利用実績はまだない。日本を含む国際社会は、オマーンのような国に対して経済・財政支援を行える柔軟なスキームを用意し、財政改革や人材育成、「オマーン・ビジョン 2040」の達成に向けた支援を行うことが重要である。また、過度に中国の接近を脅威と見なすよりは、協力してオマーンのような重要国を支援する方が、中東地域全体の安定に資するものであると言える。

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4. Making Sense of the China-Turkey Rapprochement: Current Status

KAKIZAKI Masaki

Introduction

On December 4, 2020, Turkey's first long-distance freight train headed for China set out from Kazlıçeşme Station on the European side of Istanbul. The train travelled through Georgia, Azerbaijan, and Kazakhstan, arriving at its final destination, X'ian, China, on December 19. According to Turkey's Minister of Infrastructure and Transport, this new freight line connecting Turkey and China for 8,693 km overland along the Silk Road, shortened the time for freight transport between the two countries from 45 days to just 12.¹

As this news demonstrates, the relations between Turkey and China have been strengthening in recent years, particularly in the fields of economy and trade. The first part of this report outlines recent developments in the economic and political relations between Turkey and China, and the second part considers why each country is intent on strengthening relations. The third part discusses China's Uyghur problem, the one potential issue that could interfere with the development of this relationship.

1. China-Turkey Rapprochement

For some time now, Turkey has been modifying its traditionally Western-focused foreign policy in favor of one that is more eastward-oriented. The Justice and Development Party (AKP) administration that came to power in 2002 pursued the so-called "zero problem diplomacy" until around 2009, working to improve its relations with neighboring countries. The political stability during the AKP era resulted in continuous growth of the Turkish economy, and Turkey became the largest emerging economy in the Middle East and North Africa. Consequently, Turkey's reputation grew in the West. However, since then, Turkey's relationships with Europe and the United States have gradually cooled. In particular, the gulf between Turkey and the U.S. has widened over the propriety of economic sanctions against Iran, the Syrian civil war, and Turkey's purchase of the Russian-made S-400 missile system. Relations with Europe have also deteriorated, with the possibility of EU membership becoming ever more distant, as it becomes apparent Turkey is drifting away from democracy. The Erdogan administration's use of the state of emergency in response to the attempted coup d'état in July 2016 to consolidate its power further contributed to widen the rift between Turkey and the West.

¹ ["First Turkey-China Freight Train Reaches its Destination in Historic Trip,"](#) *TRT World*, December 20, 2020.

Amid this deterioration in its relations with the West, Turkey has been trying to diversify its foreign policy. In recent times, Turkey has focused on strengthening its tie with China. October 2010 witnessed a boost in Turkey-China relations, as Wen Jiabao, the first Chinese prime minister to visit Turkey in eight years, struck an agreement with the then-Prime Minister Erdogan to upgrade their relationship to a “strategic partnership.”² In addition, the two governments agreed not only to expand bilateral trade, but also to promote the de-dollarization of economic transactions between the two countries by increasing bilateral trade in their own currencies.

Subsequently, economic relations between Turkey and China gradually strengthened. In February 2012, then-Vice President Xi Jinping visited Istanbul, interested in opening talks regarding Turkey’s progress in its plans to build another nuclear power plant.³ Two months later, Erdogan made an official visit to China—the first for a Turkish prime minister in 27 years—during which the countries signed a nuclear cooperation agreement.⁴ In June of the same year, Turkey was accepted as a “dialogue partner” in the Shanghai Cooperation Organization consisting of Russia, China, India, Pakistan, and four Central Asian countries. In addition, in 2015, Turkey decided to join the Asian Infrastructure Investment Bank (AIIB), a Chinese-led initiative, as a founding member.

Nevertheless, looking at actual trade volume, the amount of trade between Turkey and China did not grow as much as the Turkish government had hoped (Fig. 1). At the Turkey-China summit meeting in October 2010, the goal was set to raise the volume of bilateral trade to \$50 billion in 2015 and \$100 billion in 2020; however, in 2019, it was merely \$21.07 billion, far short of the target. In addition, the trading relationship has been overwhelmingly skewed in China’s favor. In 2019, Turkey exported \$2.58 billion of goods to China and imported \$18.49 billion, around seven times as much. Although the Turkish government has been trying to increase exports to China, these peaked in 2013, and they have been sluggish ever since, between \$2.5 and \$3.0 billion. Turkey’s main export destinations are predominantly made of EU countries, such as Germany and the UK, the United States, and neighboring Iraq. China’s share of Turkey’s exports remains small. Recent reductions in imports from China are due to reduced demand stemming from a slump in the Turkish economy. The Turkish government is seeking to correct this trade imbalance⁵; however, currently, there is no fundamental strategy for a resolution.

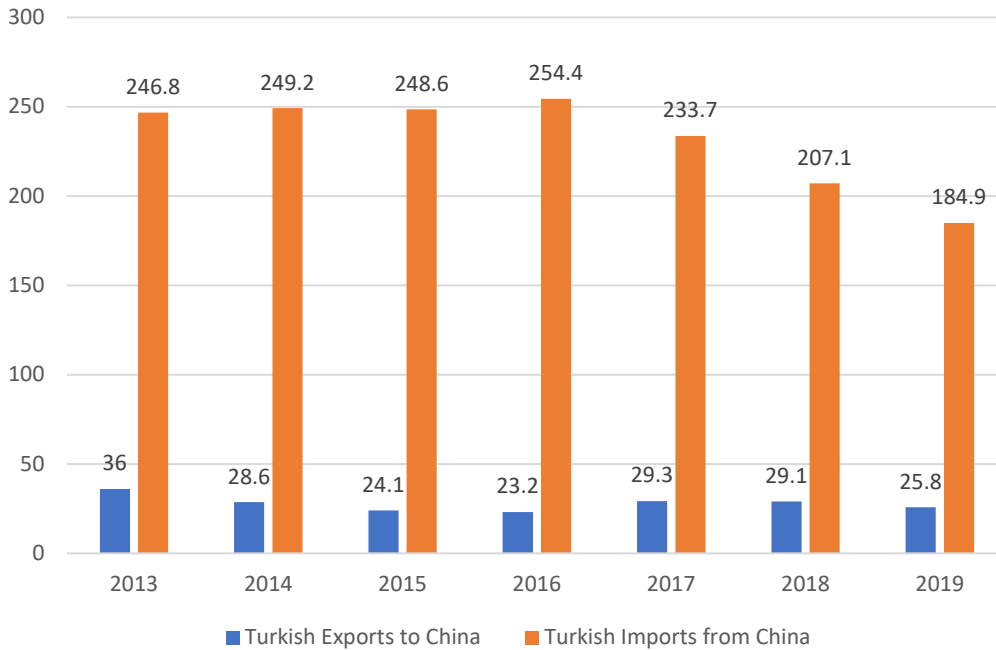
² Selcuk Golokuk and Tulay Karadeniz, “[Turkey and China Eye More Trade in ‘Strategic Partnership’](#),” *Reuters*, October 9, 2010.

³ “[Turkey Starts Nuclear Talk with China](#),” *Hürriyet Daily News*, February 23, 2012.

⁴ “[Turkey and China Sign Agreement for Peaceful Use of Nuclear Energy](#),” *Anadolu Agency*, April 9, 2012.

⁵ Tuba Sahin, “[Turkey Eyes Sustainable, Balanced Trade with China](#),” *Anadolu Agency*, December 6, 2020.

Figure 1. Turkey's trade with China (\$100 millions)



Source : [Turkish Foreign Ministry](#)

Despite declining trade between the two countries over the past few years, there have been high-profile investments of Chinese capital into Turkey. In particular, Chinese companies have made major moves into the Turkish telecommunications and e-commerce industries. In 2016, ZTE, a Chinese telecommunications giant, became the largest shareholder in Netaş, a major player in the same industry in Turkey, with an investment of \$100 million.⁶ Then, in 2018, China's Alibaba acquired a majority stake in Trendyol, one of Turkey's largest ecommerce companies for \$750 million.⁷ In addition, Huawei, a major Chinese telecommunications equipment manufacturer, is cooperating with the Turkish telecommunications and mobile telecommunication giants Türk Telekom and Türkcell in building a network that will use the next-generation "5G" global wireless standard⁸.

Next, let us examine the flow of Chinese capital into Turkish infrastructure. First, in September 2015, China Ocean Shipping (Group) Company (COSCO), the largest shipping company in China, China Merchants Holdings International, a major state-owned port company, and China Investment Co., Ltd.

⁶ "ZTE Buys 48 pct Netas for \$101 Mln, Eyes Expansion in Turkey," *Reuters*, December 6, 2016.

⁷ Dan Primack, "Scoop: Alibaba Paid \$750 Million for Turkish Startup Trendyol," *Axios*, August 14, 2018.

⁸ "Türk Telekom ve Huawei'den İş Birliği," *Anadolu Ajansı*, March 2, 2017; "Turkcell ve Huawei 5G'li Akıllı Şehirler için İmza Attı," *Hürriyet*, October 23, 2018

(CIC), China's state-owned fund, formed a consortium to acquire Kumport, which operates a cargo terminal at the Ambarli Port Complex, on the outskirts of Istanbul⁹. The terminal is Turkey's third largest in cargo volume and is a gateway for maritime trade between Europe and Asia. COSCO also increased its involvement in the Port of Piraeus, the largest port in neighboring Greece. In 2019, China's state-owned Shanghai Electric Power Company announced that it would invest \$1.7 billion in Adana in southern Turkey to build a coal-fired power plant and a terminal for the export of coal. This is China's largest direct investment in Turkey.¹⁰ In January 2020, Turkish authorities approved the sale of the company that operates the Yavuz Sultan Selim Bridge, the "Third Bosphorus Bridge" over the Bosphorus Strait to a Chinese consortium.¹¹ Thus, most of China's investment in Turkey has been concentrated in the telecommunications, transportation, and energy sectors, which clearly, are moves linked to China's "Belt and Road Initiative," which will be discussed later.

In addition to rapprochement through trade and economic investment, Turkey and China have also been exploring closer military cooperation. For example, in September 2010, following Prime Minister Wen Jiabao's visit to Turkey, the Turkish Air Force conducted joint military exercises with the Chinese People's Liberation Army, a first for a NATO member country. In addition, a few weeks later, troops from both armies conducted joint anti-terrorism training in Turkey, which was also the first time the PLA had conducted training on the territory of a NATO member state.¹² Turkey had previously conducted military exercises with the United States and Israel; however, in 2008, worsening relations with Israel led to the cancellation of the exercises. Instead, Turkey chose China as its exercise partner. In 2012, China's Long March 2D launch vehicle put Turkey's first reconnaissance military satellite, Göktürk-2, into orbit.¹³

Since then, mutual visits and exchanges of military personnel have continued. In May 2018, a Chinese delegation participated in a military exercise in Izmir, western Turkey, as observers. In July 2018, during the BRICS summit in South Africa, Presidents Erdogan and Xi Jinping confirmed their intentions to continue strengthening their countries' military and security-related relations.¹⁴

In September 2013, the Turkish government announced that it would begin negotiations to order the HQ-9 (short for Hong Qi-9, literally 'Red Banner-9') long-range surface-to-air missile system manufactured by the China Precision Machinery Import-Export Corporation (CPMIEC). In response, the U.S. government opposed Turkey's move, because it had placed sanctions on the CPMIEC, and

⁹ ["Chinese Consortium Acquires 65 Pct Stake in Turkish Port Terminal,"](#) *Hürriyet Daily News*, September 17, 2015.

¹⁰ ["China's Power Plant Project with Direct Investment in Turkey Starts Construction,"](#) *Xinhuanet*, January 21, 2021.

¹¹ ["Resmen Onaylandı! 3 Milyar Dolarlık Köprü'nün Yarısı 688 Milyon Dolara Çinlilere Gitti,"](#) *Patronlar Dünyası*, January 10, 2020.

¹² Chris Zambellis, ["Sino-Turkish Strategic Partnership: Implications of Anatolian Eagle 2010,"](#) *The Jamestown Foundation China Brief*, volume 11 issue 1, 2011.

¹³ Israelis were worried that their sensitive information would be leaked by new Turkish satellites, but Turkey brushed aside Israeli's security concern. ["Turkey Dismisses Israel's Concerns over Satellite,"](#) *Reuters*, March 11, 2011.

¹⁴ ["Xi, Erdogan Agree to Enhance China-Turkey Cooperation,"](#) *Xinhuanet*, July 27, 2018.

Turkey's purchase of CPMIEC's missile could leak NATO military secrets to China.¹⁵ Ultimately, in November 2015, Turkey abandoned the idea of buying missiles from China.¹⁶ Turkey later decided to acquire the Russian-made S-400 missile system, despite U.S. opposition. The U.S. government in turn removed Turkey from the international joint development program for its most advanced stealth fighter, the F-35, and refused to deliver the F-35s Turkey had already ordered. In response, the possibility emerged that, as an alternative to the F-35, Turkey may purchase the Chinese-made FC-31 stealth fighter.¹⁷ Notably, in 2019, the Turkish army actually launched the Turkish-made Bora missile for the first time during a battle in northern Iraq, in an attack on a PKK base. The Bora was developed based on the Chinese B-611 short-range ballistic missile.¹⁸

2. Making Sense of the China-Turkey Rapprochement

As we have seen, Turkey and China have strengthened their economic and political relations since 2010. Here, we will examine the reasons for this rapprochement from each country's perspective.

From China's perspective, Turkey, as part of the Middle East, is strategically important as part of the Belt and Road Initiative launched by Xi Jinping in 2013. In addition, the Middle East is very important to the Chinese economy as a source of natural resources. Turkey, of course, is not an important source of energy, as it does not produce crude oil or natural gas. Turkey's importance is geopolitical. The "Belt" in the "Belt and Road Initiative" (formerly known in English as, "One Belt One Road") is short for "Silk Road Economic Belt," the overland route from China through Central Asia to Europe. "Road" is short for the "21st Century Maritime Silk Road," the sea routes from the South China Sea to the Mediterranean Sea through the Indian Ocean and the Red Sea via the Suez Canal. Turkey is the one country through which both routes pass. In addition, the Belt and Road Initiative involves the development of six economic corridors, one of which is the China-Central -Asia-West -Asia Corridor (CCAWA). This corridor includes the Central Asian countries, the Caucasus region, Iran, and the Arab countries of the Middle East, with Turkey, located at its western end, being the gateway to Europe. Naturally, if it were unable to draw Turkey into the initiative, China's expansion into the Middle East, Africa, and Europe would suffer.

However, the reasons for Turkey's own rapprochement with China have changed over the last few years. Between 2010 and 2018, Turkey pursued closer relations with China due to worsening relations with the U.S. and the EU. Around this time, the international community raised concerns that Turkey was tilting away from the West. However, in reality, Turkey's economy remained dependent on the

¹⁵ ["U.S. Concerned about Turkey's Choice of Chinese Missile System,"](#) *Reuters*, September 29, 2013.

¹⁶ Ali Ünal, ["Turkey Cancels \\$3.4B Missile Deal with China to Launch Own Project,"](#) *Daily Sabah*, November 15, 2015.

¹⁷ Sertaç Aksan, ["F-35'ler için Alternatifler Hazır,"](#) *Yeni Şafak*, March 6, 2019.

¹⁸ ["Kandil'i 'Bora' Vurdu,"](#) *Hürriyet*, May 30, 2019.

West for security. Turkey was pursuing a reaffirmation of its importance to the West and increasing its bargaining power, by strengthening its relations with China and Russia, and by building its presence in the region. In addition, Turkey, as a major power among the emerging economies of the Middle East, has called for a change in the Europe/U.S.-centric international political order, and is working toward that change. Thus, the views of the two countries coincide in their conviction that it is necessary to change the current state of international affairs. China, intent on breaking through the status quo, is rapidly emerging as a global challenger to U.S. hegemony, and Turkey is also demonstrating its objection to Europe and the U.S. dominating international politics.

Subsequently, in 2018, Turkey's reliance on China increased for financial rather than historically strategic reasons, resulting from a currency crisis caused by the extreme deterioration in relations with the U.S. One could say that the Turkey-China relationship has entered a new phase since then. The currency crisis occurred as the result of economic sanctions imposed by the Trump administration to force the release of an American pastor held under house arrest for involvement in the attempted coup d'état in Turkey in on July 15, 2016. The sanctions caused the Turkish lira to crash to its lowest value ever. Faced with a potential debt crisis, the Turkish central bank began to battle to defend the lira by selling foreign currencies. Simultaneously, investment in Turkey from the West cooled due to the resulting downgrade of the country's credit rating.

Thus, under these circumstances, Turkey became financially more reliant on China. In May 2018, President Erdogan's son-in-law, Berat Albayrak, the Minister of Energy and Natural Resources, visited China to request a loan.¹⁹ Consequently, the Turkish government agreed with the state-owned Industrial and Commercial Bank of China on a loan for \$3.6 billion.²⁰ Furthermore, in December 2019, the China-led AIIB decided to provide Turkey with \$500 million in financing for infrastructure development.²¹ Then, in June 2020, following a further fall in foreign currency reserves, Turkey's central bank, for the first time, used a yuan-denominated swap with the People's Bank of China to obtain yuan to fund its transactions with China.²²

Since the outbreak of COVID-19 at the start of 2020, the Chinese presence in Turkey continues to gain prominence. The Turkish government, hoping to hasten the rebuilding of its economy, through diplomatic channels, sounded out the Chinese government about providing Turkey with a vaccine developed by Sinovac Biotech. In response, the Chinese Foreign Minister Wang Yi said, "Turkey's decision to buy Chinese vaccines shows trust toward China, and the Chinese side will provide the necessary help."²³ Consequently, large-scale vaccination of the Turkish population with the Chinese-

¹⁹ "[Enerji ve Tabii Kaynaklar Bakanı Albayrak Pekin'de Enerji Sektörünün Temsilcileriyle Görüştü](#)," *Anadolu Ajansı*, May 3, 2018.

²⁰ "[Çin'den 3.6 Milyar Dolar Geliyor](#)," *Sabah*, July 27, 2018.

²¹ AIIB, "[AIIB Invests USD500M to Support Turkey's Urban and Energy Infrastructure](#)," December 19, 2019.

²² "[Turkish Central Bank Says Used Chinese Yuan Funding for First Time](#)," *Reuters*, June 19, 2020.

²³ Sinan Tavsan, "[Turkey to Deploy Chinese COVID Vaccine as Beijing Aims for Clout](#)," *Nikkei Asia*, December 18, 2020 <https://asia.nikkei.com/Spotlight/Coronavirus/Turkey-to-deploy-Chinese-COVID-vaccine-as-Beijing-aims-for-clout>

made vaccine began in January 2021. In addition, the AIIB also announced in July 2020 that it would lend Turkey \$500 million to support businesses hit by the COVID-19 crisis.²⁴ Furthermore, at the end of August 2020, with the European Bank for Reconstruction and Development (EBRD), the AIIB announced a loan to Turkey of €70 million, to support the country's strengthening of medical care infrastructure against COVID-19.²⁵

3. The Uyghur problem

A potential impediment to Turkey and China strengthening bilateral relations is the Uyghur problem. The issue revolves around the Chinese government's counterterrorist crackdown on the Uyghurs, a majority-Muslim people, living in the Xinjiang Uyghur Autonomous Region in western China. The Turks are linguistically, culturally, and religiously close to the Uyghurs. Turkey has been a leading critic of China and a refuge for Uyghurs seeking asylum. Many Uyghurs have escaped or immigrated to Turkey since the late 1940s and there are Uyghur communities in Istanbul and in Kayseri in central Turkey. The Turkish Uyghurs continue to be actively involved in political activities seeking independence for their homeland, "East Turkistan." In July 2009, when a large number of Uyghurs lost their lives during a disturbance arising from dissatisfaction with the Chinese government's Uyghur policy, Prime Minister Erdogan vehemently criticized China, saying, "What China was doing looked like genocide."²⁶ In July 2015, there were violent anti-Chinese demonstrations in Turkey for about 10 days, because of widespread reports that Uyghurs there had been prohibited from fasting during the month of Ramadan.²⁷

Nevertheless, recently, the Turkish government has refrained from criticizing China over the Uyghur problem. In July 2019, on an official visit to China, state-run media reported that in a meeting with President Xi Jinping, President Erdogan said, "It is a fact that the peoples of China's Xinjiang region live happily in China's development and prosperity."²⁸ President Erdogan not taking a strong stance on the Uyghur problem is because Turkey attaches more importance to strengthening economic relations with China than to the human rights issues of the Uyghurs. Prior to these talks, Erdogan had written in an opinion piece for China's *Global Times* describing how Turkey and China share values such as world peace and stability, multilateralism, and free trade, and declared that Turkey would

[accessed on January 15](#), 2021.

²⁴ Asian Infrastructure Investment Bank, "[USD500-M COVID-19 Loans from AIIB to Increase Access to Liquidity in Turkey](#)," AIIB, July 3, 2020.

²⁵ Asian Infrastructure Investment Bank, "[AIIB Approves EUR70-M Loan to Support Turkey's Healthcare Infrastructure](#)," August 31, 2020.

²⁶ "[Başbakan: Çin'de Olanlar 'Adeta Soykırım'](#)," *Hürriyet*, July 10, 2009.

²⁷ Selin Girit, "[5 Soruda Uygur Türkleri ve protestolar](#)," *BBC Türkçe*, July 8, 2015.

²⁸ "[China Says Turkey President Offered Support over Restive Xinjian](#)," *Reuters*, July 2, 2019.

strongly support the Belt and Road Initiative.²⁹ In addition, he mentioned that Turkey was promoting the “Middle Corridor” project of connecting Turkey, Azerbaijan, and Georgia through a rail network which would be an important part of China’s Belt and Road Initiative. Thus, he noted, the two countries’ projects were complementary. However, he made no mention of the Uyghur problem in this piece.

Although there continues to be criticism of China and dissatisfaction over the Uyghur problem in Turkey, the Erdogan administration has continued to contain this dissatisfaction. For example, in June 2019, the right-wing opposition party, the Good Party (İyi Parti), submitted a motion to the Turkish Parliament, asking the government to investigate whether Chinese authorities were violating the human rights of the Uyghurs. However, the ruling Justice and Development Party opposed the motion out of consideration for Turkey’s relationship with the Chinese government, and the motion failed.

Amid the government’s refraining from any criticism of China on the Uyghur problem, it has also changed its policy toward Uyghurs living in the country. One of the reasons for this change was the arrest of several Uyghurs from Xinjiang for their involvement in the perpetration of a mass shooting at a New Year’s Eve party in an Istanbul nightclub in 2017. The terrorist organization, the Islamic State (IS), claimed responsibility for the incident, which increased concerns of an influx of global jihadists into Turkey through the Uyghur independence movement.³⁰ Since then, the Turkish government distinguishes between independence movement activists and ordinary Uyghur citizens, referring to the former as “extremists” who threaten China’s territorial integrity, or as “terrorists,” as part of an effort to build a collaborative relationship with China to contain terrorism.³¹

Currently, Turkey is mulling over whether to ratify an extradition treaty signed with China in 2017. If it were to come into effect, Uyghurs living in Turkey could potentially be sent back to China. Separately, as already mentioned, Turkey decided to procure the COVID-19 vaccine from China, scheduled to arrive in December 2020. Meanwhile, the Chinese government suddenly announced that it had ratified the extradition treaty. Simultaneously, the scheduled delivery of the vaccine to Turkey was delayed for “procedural reasons” for three weeks.³² Consequently, opposition parties in Turkey questioned whether China was pressuring Turkey to ratify the treaty by delaying the delivery of the vaccine.³³ Others tended to take China’s move as a signal to the Uyghurs living in Turkey to stop their political activities, rather than to send any message to the Turkish Parliament.³⁴ In any case, the end of 2020 saw the unexpected enmeshing of the coronavirus crisis and the Uyghur problem. The Erdogan administration will find it difficult to frame a response that will please domestic public

²⁹ Recep Tayyip Erdogan, “[Turkey, China Share a Vision for Future](#),” *Global Times*, July 1, 2019.

³⁰ Ivy Yang, “[The Reina Nightclub Attack Might Change Turkey-China Relations](#),” *Atlantic Council*, January 19, 2017.

³¹ “[China’s Xi Calls for Greater Counter-terrorism Cooperation with Turkey](#),” *Reuters*, May 14, 2017.

³² “[1st Shipment of Chinese COVID-19 Vaccines to Arrive in Turkey on Monday](#),” *Daily Sabah*, December 24, 2020.

³³ Sina Tavsan, “[Turkey Accused of Trading Uyghurs for Chinese Vaccine](#),” *Asia Nikkei*, January 14, 2021.

³⁴ Tavsan, “[Turkey Accused](#).”

opinion, which favors protecting the Uyghurs, and China, which wants to keep the Uyghur problem from becoming an impediment to better relations for the time being.

Conclusion

It is evident that Turkey has been strengthening its economic and security-related ties with China over the last few years. However, such moves do not mean that Turkey has turned away from the West. Turkey first began focusing on China because of its deteriorating relations with Europe and the U.S. By developing closer relations with China and Russia, Turkey was possibly trying to remind Western countries of its importance, and enhance its bargaining power. In fact, while it has been strengthening its relations with China and Russia, it has not given up on improving relations with the U.S. and the EU. With former Vice President Biden's victory in the 2020 U.S. election, who advocates rebuilding the NATO alliance, Turkey has moved quickly to improve its relations with the EU. In other words, Turkey's tilt toward China was the result of its deteriorating relations with the U.S. and with Europe. If an opportunity presents itself, for example, with the change of administrations in the U.S., Turkey will surely attempt to restore relations.

Therefore, if the U.S., NATO, and Japan, were to try to prevent Turkey from being drawn further into Beijing's orbit, it would require stepping in to supply the political and economic support Turkey needs, going forward. However, President Biden, an advocate of restoring confidence in democracy, is expected to be tougher on Erdogan's increasingly authoritarian style of government. This will increase difficulties in restoring Turkish-U.S. relations. Consequently, for the near future, Turkey's strategic rapprochement with China is likely to continue.

5. Seeing from the Outside: How International Development Actors Should Rethink the State versus Non-State Paradigm

Yezid Sayigh

An emerging body of literature analyses the challenges posed to pluralist politics, sustainable development, and good governance in Arab states variously characterized as fragile or poorly-governed, dominated by crony capitalism rather than healthy free markets, and ruled by increasingly repressive social “pacts.” It reveals a particular paradox: these states endure despite their stark failure to deliver basic economic, social, and other public goods – not least, security – and to generate domestic savings and surpluses in national accounts with which to finance capital investment, maintain growth, and enhance competitiveness and integration into global value chains. Indeed, this is also typical of some states in the region that are neither failed nor fragile, and which might even be classified as strong – or rather as “fierce,” to quote the late political scientist Nazih Ayubi.¹ But in the former category, at least, the state both fails and, paradoxically, survives because non- or sub-state political actors representing principal social constituencies or communities are deeply intermeshed with it.²

This paradox has broad implications for international donors and development agencies, as well as for academics. Common to both is a primary analytical and policy focus on the state, whether to assess its actual behaviour or to examine (and improve) the factors that affect its capacity and willingness to respond to mounting challenges. But conventional approaches to Arab states suffering fragility or fragmentation routinely fail to grasp their evolving nature or to explain their continuing ability to survive, if not to function effectively. Additionally, programming by international donors and development agencies makes normative and practical assumptions about state capacity that clash with reality: about how to generate institutional and technocratic capacity, and the purposes to which this capacity should and can be put. Naturally, these assumptions stem from an understanding of how best to achieve social profitability—the total of private and external benefits for society from the production or consumption of public goods and services provided by the state.

The problem, however, is that international donors and development agencies over-privilege the presumed separation of state and society. That is, they continue to regard domestic non-state actors as lying outside the state, whereas in fact they have come to form a part of its fabric and sustain it. For international donors and development agencies to continue operating within this framework on a “business as usual” basis appears neither acceptable nor useful, since it helps consolidate the

¹ See his *Over-Stating the Arab State: Politics and Society in the Middle East*, I.B. Tauris, 2005.

² I use the terms “non-state” and “sub-state” actors interchangeably, taking both to refer specifically to domestic groups or organizations, not to trans-national ones. In most relevant instances, non- and sub-state actors have both political and military arms and may also provide certain civilian services.

dysfunctional nature of relations between the state and the non-state actors permeating it. But ignoring the problem by insisting on dealing with states “as if” they conform to conventional definitions and expectations leads to a similarly negative outcome.

Again, this is partly because external actors rarely, if ever, invest sufficient resources to significantly alter the political and financial cost-benefit calculations of local actors. The U.S. invasion of Iraq in 2003 and subsequent re-engineering of the Iraqi state and political system offers a stark demonstration of this limitation, since it shows a poor correlation between the exceptionally high commitment of resources made by the world’s wealthiest and strongest global power, on the one hand, and its ultimate outcomes on the other. The U.S. invasion set Iraq on a fundamentally new course, certainly, but even an investment on this enormous scale failed to ensure the appearance of a functioning new state or free market economy in the country. Quite the reverse, if anything, as the new, consociational politics of a democratic Iraq translated into the capture of the state by non-state actors and perpetuated the chronic decades-long enfeebling of the private sector.³

The need to reassess conventional donor and development approaches is evident, as they have failed by almost every measure to deliver stated goals in Arab countries suffering state fragility or fragmentation. As noted above, a central analytical problem is the conventional portrayal of non- or sub-state actors as lying *outside* the state, and as extraneous to the state’s role in managing public finances and economic assets. In this perspective, non-state actors are seen as predators from without, rather than within, the state and its various agencies. However, this is rarely the case—if ever.

But this perspective reflects more than normative biases alone. The role and influence of external actors—foreign governments providing development or security assistance, international financial institutions, and even some nongovernmental organizations—are especially marked in fragile Arab states. Whatever their motives, external actors are often the main vectors for the emergence, power, and sustainment of domestic non-state actors. More often than not, their interventions act as magnifiers, enabling rent-seeking and predatory behaviour by local counterparts whose financial and economic costs and impacts on institutional and social outweigh by far the beneficial effects of development assistance provided by the same external actors to domestic governments and civil society actors.

³ Consociationalism is a form of government that guarantees representation of participating political or social actors, allowing stable political settlements and managing contestation in divided societies. It usually involves elite understandings that maintain social segmentation, and thus is both solution and problem. For an example of the voluminous literature on this subject, see Rudy B. Andeweg, *Consociational Democracy*, *Annual Review of Political Science*, Vol. 3:509-536, June 2000. <https://doi.org/10.1146/annurev.polisci.3.1.509>

1. A critique of conventional approaches

The preceding indicates the need for academics and the international donor and development community alike to conduct a broad reassessment of their analytical and policy-making approaches along three main lines that straddle the systemic (how we conceptualize the state and its mutually constitutive relations with what we commonly think of as “non-state”), the programmatic (how resources are mobilized and directed towards making material changes in the real world), and markets (where the economic, social, legal-bureaucratic, and political come together).

A first line of reassessment is to break from the *systemic* view that sees states and non- or sub-state actors as forming a binary opposition. After all, the state is itself far from wholly unitary and routinized even in what are commonly regarded as monolithic and highly hierarchical states. Egypt offers a prime example, where, political economist Amr Adly argues, state institutions are divided into three categories: the formal, the informal, and the semi-formal.⁴ Each of these encompasses a distinct set of executive rulings, norms and customary procedures, and the dynamic (that is, negotiated) interface between the preceding two sets.

Most significantly, however, external donor and development agencies seeking to engineer particular governance (“best practice”) and market (“development”) outcomes make fundamental errors when judging what lies within or without permissible behaviours, and between what is “normal” or “abnormal.” A prime example is the perception of corruption as an “aberration” rather than an embodiment of the rules by which the entire system that is, the state, its assorted agencies, and social and economic actors) functions.⁵ This is not to advocate tolerance of corruption by any means, but rather to observe that external inputs into a system that functions in this manner sustain it, rather than generate improvements in behaviour.

Of equal importance is that the systemic logic shifts: processes and procedures are invariably codified in these states, but how they function is fluid, “organic,” and variable in their application. In short, policy recipes and technical fixes that approach the state as an unproblematic “good”—that is moreover confronted by non- or sub-state actors that are necessarily “predatory”—not only impose a highly normative framework that does not exist anywhere in the real world, but moreover often derive from bureaucratic imperatives and political processes of the external donors and practitioners that are divorced from local realities and needs.

⁴ *Cleft Capitalism: The Social Origins of Failed Market Making in Egypt*, Stanford University Press, 2020, 2 and 42 for example.

⁵ This borrows a point made by Thomas de Waal in “Fighting a Culture of Corruption in Ukraine,” Carnegie Article, April 18, 2016. http://carnegieeurope.eu/2016/04/18/fighting-culture-of-corruption-in-ukraine/ix9h?mkt_tok=eyJpIjoiTTJSa05qUmpabUkzTIRZNSIsInQiOiJQkFDRkgxUTIRM3FsVHFGZldjbzBDMHAxeGZrZ2k1WG5Wb1k0QUJMeE1FRThYQTh0amoyU9YmFYSmZOa1crY0VPVFIWTHg3ZUJsbWlzSGlkRVZmYWJDCGViaWI0MnQrQk44SmpocGpSaz0ifQ%3D%3D

Second, the preceding leads, on a more *programmatic* level, to the observation that the tendency of development and donor agencies to place managerialism—that is, a focus on technical skills, due diligence, good governance, and so on—at the center of their operational approaches is misdirected. Again, this is not to dispute either the normative or pragmatic importance of good and capable management. Rather, the problem lies in a binary perspective that treats state institutions as capable of being insulated or placed at a remove from forces and dynamics seen as lying “outside” the state, or of standing impartially above them.

This perspective misses the point that the changes external actors seek to engineer in state capacities do not derive from the formal bureaucracies but rather from changes within society. An assessment by the European Union of the lessons learned from its police missions supporting security sector reform in Arab and other countries noted that donors and development practitioners privilege “institution building or capacity building programmes which may not have a tangible impact on human security” and pay inadequate “attention to the needs of the local population and service-delivery.”⁶ In other words, program design and focus are often developed and implemented as if in a vacuum.

In theory, managerialism could help insulate state institutions, which would presumably merely implement the will of the majority of society in democratic systems, in accordance with set processes and procedures and with legal norms and constitutional safeguards. But conditions differ in countries where a combination of armed conflict and authoritarian or kleptocratic government has fundamentally eroded bureaucratic capacity, financial wellbeing, and what passed as social contracts. There, non-state actors both reflect social trends and mobilize social forces, and transfer the resulting power they generate into the state structure. They become integral to state structures in ways that exceed classic Marxist analysis—which sees the state as an instrument of the dominant class—and alter—sometimes completely—the institutional environment within which donor and development programs operate.

Third, one of the most important arenas in which the above systemic and programmatic levels intersect is the *market*. International donors and development agencies seek, above all, to generate economic growth and encourage integration of local populations in markets. They moreover apply various financial and technological levers with the aim of engineering – or at least encouraging and facilitating – such outcomes. The amenability of national legal and administrative systems established and regulated by competent state authorities to assist such interventions and ensure return on external assistance is assumed – or else pursued through additional donor-funded technical assistance programs. But all such efforts face a problem in countries where, in Adly’s words, “market integration has never successfully taken place on a large scale ... resulting in the marginalization and

⁶ Cited in Florence Gaub and Alex Walsh, *Relationship therapy: Making Arab police reform work*, Chaillot Paper 160, November 2020, 14. https://www.iss.europa.eu/sites/default/files/EUISSFiles/CP_160.pdf

exclusion of the majority from the production of economic value.” Furthermore, weak investment rates and consumption-driven development models are the consequence not of “mere structural constraints,” he continues, but of “institutional arrangements—social, economic, and political—” in countries that have undergone liberalization without much actual development.⁷

Adly was discussing Egypt, but his description is broadly true of the Arab states categorized as fragile or fragmented, all of which have experienced a similar syndrome. Along with more stable and less conflict-ridden Arab states, they may be said to be globalized—albeit in specific, often distorted ways. The volume of their external trade (one of the standard criteria for measuring globalization) is significant, as most rely overwhelmingly on imports for consumer goods and technology, and even for food. Many additionally have high rates of outward migration, which ties them into global markets through the resulting reverse flow of remittances, which constitutes a major source of foreign exchange reserves and increases Gross National Product (GNP). However, Arab states that receive international development assistance—including both those that are fragile or fragmented and those that boast stable political orders and security—uniformly manifest weak integration into global value chains. Transforming this means revising the institutional arrangements that shape both the political and moral economy,⁸ but as noted above, donors and development agencies tend heavily to interpret the task as relating more narrowly to technical skills and managerial expertise in government agencies.

But the critical point is that the domestic markets that the state is supposed to govern, and many of the related means through which the state shapes investment decisions by domestic economic actors, are outside national control in key respects. “National marketplaces”—let alone national economies—have often been replaced by more localized market networks in response to physical constraints and increased transaction costs of operating countrywide. In border regions, moreover, local markets may have denser interactions—of trade, especially, but also of investment and labour—with counterparts across the border in neighboring countries, than they do with the rest of their own countries. Indeed, that international donors and development agencies have also recognized this shift

⁷ *Cleft Capitalism*, 11 and 12.

⁸ The term “political economy” refers to the interaction of political and economic processes shaping “the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time.” *Power, livelihoods and conflict: case studies in political economy analysis for humanitarian action*, Sarah Collinson (ed.), Humanitarian Policy Group, Overseas Development Institute, HPG Report 13, February 2003, 3. <https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/289.pdf>. The term “moral economy” as used here refers to the expectations and mutual obligations that each party to an economic relationship or transaction holds about the other party or parties, and to notions of equity and fairness within the relationship. For a full discussion see James G Carrier, “Moral economy: What’s in a name,” *Anthropological Theory*, 2018, Vol. 18 (1), 18–35. DOI: <https://doi.org/10.1177/1463499617735259>

is reflected in their growing interest in the dynamics of border regions, seeing them as sources not only of illicit activities and threats, but also of lessons for social and economic resilience.⁹

Even within national territory, the function of the state and the nexus of power within it are also shifting and being redefined constantly. The environment within which relationships of supply and demand in the domestic economy and conditions that shape investment decisions—and hence capital formation and accumulation of wealth—has become more multi-faceted, dispersed, and permeable to external forces. A special instance of this is the heavy reliance of fragile or fragmented Arab states (along with several stable states as well), which generate high rates of outward migration, on the significant remittances sent home by large diaspora communities. This makes an extremely important contribution to hard currency reserves, balances of payments, and household incomes, but further underlines state dependence on capital flows that are shaped entirely by conditions in the sending economies.

2. Rethinking the State?

What is the state? Is it a “reality,” a “representation,” or an “effect”?¹⁰ The question is germane in all societies, but poses a particular challenge for international donors and development agencies operating in fragile or fragmented states, where concrete programmatic decisions follow on such conceptual definitions and distinctions and where working assumptions must be made. Here, the praxis of external actors, including Western states, reveals an additional, stark contrast: they are often ready to “recognize or otherwise engage with powerful substate and so-called hybrid forces” in the security domain, as Erica Gaston notes, and yet fall back on conventional approaches to enhancing state capacity and governance in civilian domains. In her cogent argument, “partnering with or supporting non-state, substate, or quasi-state forces where expedient to do so...[while maintaining a] still state-centric bias in the presumptions and working tools of statecraft, and the politics surrounding some of these groups, bars anything more than a short-term or reactive approach.”¹¹

International donors and development agencies operate in a schizophrenic policy framework, in other words. When pursuing the rule of law and service delivery objectives that are expected of the ideal “neo-Weberian” state, they fall back on providing recipient states with technical assistance. But other arms of the same foreign governments that provide donor assistance readily adopt more hardnosed

⁹ For example, the program on “Understanding Conflict in Border Regions” at the Malcolm H. Kerr Carnegie Middle East Center. <https://carnegie-mec.org/specialprojects/xborderlocalresearchnetwork/?lang=en>

¹⁰ I owe this wording to Eberhard Kienle, from a discussion on October 2, 2020.

¹¹ Erica Gaston, “Practical Challenges and Hybrid Hypocrisy: Legal and Policy Dilemmas with the Hybrid Moniker,” *War on the Rocks*, January 25, 2021. https://warontherocks.com/2021/01/practical-challenges-and-hybrid-hypocrisy-legal-and-policy-dilemmas-with-the-hybrid-moniker/?utm_source=Chatham%20House&utm_medium=email&utm_campaign=12125954_MENAP%20-%20Newsletter%20-%2002.02.2021&dm_i=1S3M,77WG2,07YX6F,T9X8T,1

and pragmatic approaches towards non-state actors who can help them achieve their own security goals in the recipient countries concerned. Ironically, well-intentioned calls for Western governments to engage with non-state actors under-estimate both the extent to which they already do so, and the difficulty of integrating engagement with a broader state-building effort.¹²

This leads to a messy situation in which, critically, effective governance and meaningful accountability are eroded further. The problem is compounded gravely, as Ariel Ahram notes, by “the political, legal and symbolic battle for ownership and authority to manage and dispose” of economic assets “as national economies splinter and collapse.”¹³ Non-state actors in Yemen, Iraq and Libya, he adds, “have launched alternative financial institutions, including national oil companies, central banks and other financial institutions,” turning “the formal institutions of economic governance ... [into] focal points of contestation between rebel actors and governments” supported by rival external actors. So even as donors deploy formulaic jargon about managerial “best practice,” their praxis sidesteps the questions posed by Fouad Marei in a case-study of ground-level relations between the state and non-state actors in the Lebanese capital, Beirut: “who manages the formation and stewardship of the formal and informal rules that regulate the public realm? Where does governance take place?”¹⁴

In fairness, international donors and development agencies confront conditions greatly complicated by domestic actors, who of course contribute significantly to the decline of state capacity in their own countries. With the declining ability to deliver essential public goods, moreover, comes a decentralization or devolution by governing authorities of both coercive power and symbolic capital (embodied, for instance in law-giving and dispensation of justice). As the state loses the trust of its own population or significant societal sectors, other quasi-institutions and informal markets (of commodities, but also of security) come increasingly to play a role. In a context of armed conflict or of state fragility or fragmentation, non- or sub-state actors may over time become more state-like, as Gaston observes, with “substantial control over territory, significant military power, and an impressive apparatus of service provision and governance, often more than the titular sovereign,” whether won “by force, through political accords, or at the ballot box.”

To put it slightly differently, donor-supported state-building efforts often miss the point because changes in state capacity “do not come from the formal bureaucracies but rather from societal

¹² This kind of call is made, for example, in the otherwise commendable compilation of case-studies in Julien Barnes-Dacey, Ellie Geranmayeh, and Hugh Lovatt, “Guns and governance: How Europe should talk with non-state armed groups in the Middle East,” European Council on Foreign Relations, November 11, 2020. <https://ecfr.eu/special/mena-armed-groups/introduction/>

¹³ Ariel I. Ahram, “Rebel Oil Companies and Wartime Economic Governance in the MENA,” in Luigi Narbone (ed.), *Revisiting natural resources in the Middle East and North Africa*, Middle East Directions, European University Institute, 2020, 37. <https://hdl.handle.net/1814/69265>

¹⁴ Fouad Gehad Marei, “Governing Dahiya: Interrogating the State in Beirut’s Southern Suburbs,” *Leadership and Developing Societies*, 5(1), 2020, 13. <https://leadershipandsocieties.com/index.php/lds/article/view/governing-dahiya>

changes,” in Renad Mansour’s assessment of post-2003 Iraq.¹⁵ There, in his assessment, formal institutions “were not the space for social power.” A further paradox is that it is often non-state actors who may pursue institutional capacity-building in ways officially advocated by Western donors and development practitioners, even if they do not also include the discourse and mechanisms of specifically democratic forms of governance. That is, some non-state actors pay greater attention to managerial capacity and efficient bureaucratic functioning, internal accountability, responsive service delivery, and financial probity than the state actors supported by donor governments.¹⁶

International donors and development agencies are compelled to navigate the fluid lines of power and dynamic relationships anchored in the political settlements reached between principal state and non-state actors to stabilize post-conflict transitions. This generates a vicious circle. On the one hand, donor approaches to state-building do little, if anything at all, to reverse the actual hollowing out of institutional capacity and degrading of political legitimacy. On the other hand, this dismal result is then deemed to justify the conviction among donor governments that they cannot rely on the recipient state and must engage with non-state armed actors to deliver crucial goals, even if doing so degrades governance and accountability even further. Donor resort to formulaic jargon about managerial “best practice” skirts the true sources of the capacity-building challenge, while masking parallel practices that serve donor government agendas in other spheres ranging from security through trade and investment. Domestic actors, who of course contributed significantly to the decline of their own states in the first place, reposition and realign accordingly.

Conclusion: Donors in a post-rent Arab region

Even before the COVID pandemic struck, it was apparent that rentierism is in crisis throughout the Arab region.¹⁷ This both reflects and reinforces multiple long-term transformations in societies, economies, and political arrangements that are undermining the structures and functioning of the state in unprecedented ways. In many Arab states, not just fragile or fragmented ones, the overall

¹⁵ Renad Mansour, “The Hashd Network and the Iraqi State,” Draft paper, workshop on “Rethinking Iraqi state and society eighteen years after regime change,” Middle East Centre, London School of Economics and Political Science, October 2, 2020. Mansour uses the concept of space extensively in his *Networks of power: The Popular Mobilization Forces and the state in Iraq*, Research Paper, Chatham House, February 2021. <https://www.chathamhouse.org/2021/02/networks-power>

¹⁶ This is suggested, for example, in the findings of Mara Revkin, “When Terrorists Govern: Protecting Civilians in Conflicts with State-Building Armed Groups,” *Harvard National Security Journal*, Vol. 9, 2018, 100-145. https://harvardnsj.org/wp-content/uploads/sites/13/2018/01/3_Revkin_WhenTerroristsGovern-2.pdf; and in Yezid Sayigh, “We serve the people”: *Hamas policing in Gaza*, Crown Paper, Crown Center for Middle East Studies, March 2011. <http://www.brandeis.edu/crown/publications/cp/cp5.html>; and Yezid Sayigh, *Policing the People, Building the State: Authoritarian transformation in the West Bank and Gaza*, Carnegie Paper, Carnegie Middle East Center, February 2011. <http://www.carnegieendowment.org/publications/?fa=42924>

¹⁷ For a discussion, Marwan Muasher and Maha Yahya, “A Coming Decade of Arab Decisions,” Carnegie Endowment for International Peace, September 9, 2020. <https://carnegieendowment.org/2020/09/09/coming-decade-of-arab-decisions-pub-82506>

volume of disposable rent is contracting—whether due to declining revenue from oil exports, or to a drop in per capita share as populations grow and government payrolls expand—and delivery of public goods (including security) is receding. The paradox is that the material interests that previously bound ruling elites and public sectors together are also what render the entire system unsustainable. Yet rather than prompt reform, more often than not this triggers greater competition for a diminishing pot of resources among actors that straddle the boundaries between state and non-state. In short, autocratic ruling elites and coalitions of key state institutions seek to reproduce rentierism without rent, and are resorting increasingly to what Steven Heydemann calls “in order to make this possible.

The COVID pandemic will most likely intensify social inequality, income disparity, and political polarization over the long term in Arab states, as for the rest of the world. The prospect is darkened further by the increasingly evident effects of climate change, which most Arab states are singularly unprepared to confront. International donors and development agencies operate in a context where, as noted previously, their interventions and investments in tweaking governance or invigorating markets are miniscule compared to the larger political economy of state-based redistribution of resources and control of access to economic opportunity. This is not new, but although the need for donor assistance is greater than ever two decades into the 21st century, so are the challenges of navigating an increasingly complex state terrain and the risks of maintaining ineffective approaches.

6. 湾岸の安全保障問題と日本の対応—サウジアラビアと米国の視点を踏まえて

Japanese Foreign Policy on Gulf Security Issues: From the Perspectives of Saudi Arabia and the United States

近藤 重人 (KONDO Shigeto) ¹

Summary

From 2019 to early 2020, Japan had several key opportunities to deepen its involvement in security issues in the Gulf region. For instance, in June 2019, Prime Minister Abe visited Iran and exchanged opinions with Iran's leaders on the importance of easing regional tensions. In January 2020, he visited three Gulf countries; Saudi Arabia, the United Arab Emirates (UAE), and Oman. There, he discussed the dispatch of the Maritime Self-Defense Force to the Middle East, the relaxation of tensions in the Gulf region, and bilateral economic cooperation with the leaders of each country. Given that the Japanese Prime Minister rarely visits the region so often, it is noteworthy that he has actively attempted to discuss security issues as well as traditional economic cooperation in this period.

In addition, these visits have produced some results. For instance, during his visit to Iran, Supreme Leader Khamenei reaffirmed that the country had no intention of developing nuclear weapons. During this visit to Iran, however, a tanker operated by a Japanese company was attacked, and media reports only covered this case. In response to this incident, Japan, which was requested by the United States to play a certain role in the freedom of navigation in this area, decided to dispatch its own Self-Defense Forces. This constituted the main theme of the visit to Gulf countries in January 2020. Among Gulf countries, Saudi Arabia assumed the G20 presidency after Japan in 2020, thus creating a stronger opportunity than ever to deepen discussions with the country in other fields such as security issues.

Although the leaders of Japan and the United States have changed thereafter, Japan still has the opportunity to address security issues in the Gulf region in cooperation with the United States as well as regional states. For instance, the Biden administration is inclined to strengthen ties with Japan which constitutes one of the pillars in the framework of the Quad. Although the focus of the Quad is certainly primarily on China, it would be possible for Prime Minister Suga to strengthen his approach to the Middle East by utilizing this framework. Besides, as Japan showed in the days of Prime Minister Abe, there is ample room to be involved in security issues in the region using channels that the United

¹ 本稿は、近藤重人「湾岸の安全保障・経済問題と日本の対応—サウジアラビアと米国の視点を踏まえて—」『中東動向分析』（2020年4月17日）<https://jime.icej.or.jp/htm/extra/2020/db/db200417.pdf> を加筆修正したものである。

States does not have, such as relations with Iran. It may be risky for Japan to approach Iran without US consent, but if Japan uses its unique and strong ties with both the United States and Iran, it may help ease tensions between them. Since the Middle East is to remain the energy source for Japan in the foreseeable future, Japan should pursue efforts to defuse tensions in the region by collaborating with its most important security ally, the United States.

はじめに

2019年から2020年初頭にかけて、日本はペルシャ／アラビア湾岸地域の安全保障問題への関与を深める機会が何度も訪れた。たとえば、2019年6月には安倍首相がイランを訪問し、地域の緊張緩和を含めて幅広くイランの首脳と意見を交わした。また、翌年1月にはサウジアラビア、UAE、オマーンの湾岸3か国を歴訪、海上自衛隊の中東派遣、湾岸地域の緊張緩和、二国間の経済協力などについて各国の首脳と議論した。日本の首相がこの地域をこれほどの頻度で訪問することは珍しく、また従来の経済協力だけではなく、安全保障上の問題についても積極的に議論しようとした点が注目される。

そして、実際にこれらの訪問では、ある程度の成果が見られた。たとえば、イラン訪問に際して、ハーメネイ最高指導者から同国は核兵器開発の意図を持たないことを再確認することができた。ただ、このイラン訪問の最中に日本企業が運航するタンカーが攻撃に遭い、メディアの報道は訪問の成果ではなく、この事件に集まった。そして、この事件を受けて米国からこの海域の航行の自由に一定の役割を果たすよう要請された日本は、独自の自衛隊派遣という道を決め、それが翌年1月の湾岸諸国歴訪における主要なテーマの一つとなった。湾岸諸国の中でも、サウジアラビアは2020年にG20の議長国を日本から引き継いだという巡り合わせも重なり、従来にも増して安全保障問題など、他分野にわたって同国と議論を深める機会が訪れた。

以上のような問題意識に基づき、本稿ではまず昨年以降の日本の対中東首脳外交を、中東における重要パートナー国の一つであるサウジアラビア、そして言うまでもなく日本の安全保障にとって最重要な位置にある米国の専門家の見方を交えつつ、評価していきたい。その上で、日本が湾岸諸国に対してどのような政策を再構築する必要があるか考察したい。

1. 安倍首相のイラン訪問に理解を示したサウジアラビア（2019年6月）

日本の歴代首相はイラン・イスラーム革命以来、イランと鋭く対立する米国の影響もあって同国を訪問できずにいた。しかし、2019年5月に安倍首相が日本を訪問したトランプ大統領からイラン訪問について了解を得たことで、その翌月に革命後初となるイラン訪問が実現した。

日本は、この訪問については、米国だけでなく、サウジアラビアやUAEなどイランと対立する中東の国々からの理解も欠かせないと感じていた。なぜなら、両国は日本の石油の供給国として重要なだけではなく、2016年以来イランとの外交関係を断絶し、同国に対して少なくともレトリック上は非常に厳し

い非難を加えてきたからである²。

そのため、安倍首相はトランプ大統領の了解を取り付けた後、5月30日に30分程度ではあったが、サウジアラビアのムハンマド皇太子と電話会談し、イラン訪問について事前に説明した。地域のライバル国であるイランに日本の首相が訪問することに、サウジアラビアがはたして本当に懸念を抱いていたのかという点はわからない部分もあるが、少なくともこの電話会談がその後の首相のイラン訪問に関するサウジ・メディアの報道ぶりに影響を与えたことは確かだろう。

たとえば、サウジ資本のシャルクルアウサト紙は、安倍首相のイラン訪問の前日の6月11日、「安倍はワシントンとテヘランの仲介についてハーメネイと協議する」という見出しでそれについて報じ、そこに批判的なトーンは見られなかった³。そして、6月12日のロウハーニ大統領との会談についてサウジ資本の衛星放送アラビーヤは、「安倍はイランに核兵器保有禁止の重要性を強調」という見出しで報じ、首相がイランに国際社会の懸念を伝えた点を強調した⁴。これは日本としては理想的な報じられ方であり、上記のムハンマド皇太子との対話が間接的に効果を発揮したとみなすことができよう。

ただし、安倍首相の訪問2日目にあたる6月13日にはオマーン湾で2隻のタンカーへの攻撃事案が発生し、湾岸諸国のメディアの関心もそれに集中した。しかも、被害にあったタンカーの1隻が日本の国華産業が運航するものであり、さらにこの攻撃にイランが関与したとの見方が当初から湾岸諸国などでは見られたことから、サウジアラビアではむしろ日本を哀れむような論調が出現した。6月16日付のシャルクルアウサト紙は、「イランの体制は（日本の）首相を訪問中に客人として敬わなかった」というムハンマド皇太子の発言を報じ、日本がサウジアラビアの意に反してイランと接近を進める国としてではなく、イランと協議しようとした矢先にその相手から裏切られた哀れな国というような描き方がされた⁵。

このように、日本の首相がイランを訪問することで、サウジアラビアがアレルギーを示すのではないかという当初の懸念は、日本の事前のムハンマド皇太子に対する根回し、そしてタンカー攻撃という偶

² 近藤重人「サウジアラビアの対イラン政策——レトリックと現実——」日本エネルギー経済研究所中東研究センター、2019年度 国際シンポジウム、2019年11月12日

³ 「安倍はワシントンとテヘランの仲介についてハーメネイと協議する」『シャルクルアウサト』（2019年6月11日）

<https://aawsat.com/home/article/1761766/%D8%A2%D8%A8%D9%8A-%D8%B3%D9%8A%D8%A8%D8%AD%D8%AB-%D9%85%D8%B9-%D8%AE%D8%A7%D9%85%D9%86%D8%A6%D9%8A-%D9%88%D8%B3%D8%A7%D8%B7%D8%A9-%D8%A8%D9%8A%D9%86-%D9%88%D8%A7%D8%B4%D9%86%D8%B7%D9%86-%D9%88%D8%B7%D9%87%D8%B1%D8%80>

⁴ 「安倍はイランに核兵器保有禁止の重要性を強調」『アラビーヤ』（2019年6月12日）

<https://www.alarabiya.net/ar/iran/2019/06/12/%D8%B1%D8%A6%D9%8A%D8%B3-%D8%A7%D9%84%D9%88%D8%B2%D8%B1%D8%A7%D8%A1-%D8%A7%D9%84%D9%8A%D8%A7%D8%A8%D8%A7%D9%86%D9%8A-%D8%A7%D9%84%D9%89-%D8%A7%D9%8A%D8%B1%D8%A7%D9%86-%D9%84%D8%AA%D8%AE%D9%81%D9%8A%D9%81-%D8%A7>

⁵ “Mohammed bin Salman to Asharq Al-Awsat: We Don’t Want War but We Won’t Hesitate in Dealing with Any Threat,” *Asharq AL-Awsat*, June 16, 2019. <https://aawsat.com/english/home/article/1769696/mohammed-bin-salman-asharq-al-awsat-we-don%E2%80%99t-want-war-we-won%E2%80%99t-hesitate-dealing>

然の事件によって、良くも悪くも杞憂に終わった。しかし、サウジアラビアがあっさり日本のイラン訪問に理解を示したのは、日本がイランを訪問しても、たとえばオバマ政権時代の米国とは異なって、自国の安全保障環境にさしたる変化を生まないと考えたことの裏返しであった可能性もあり、この点は精査しなければならない。

2. 安倍首相のサウジアラビア訪問の目的と同国の反応（2020年1月）

1.1. 安全保障問題を前面に出した日本

2019年5月・6月のオマーン湾におけるタンカー攻撃を受け、米国は同海域の安全保障について、その海域の航行から利益を享受している国々がもっと関与するべきと主張、自ら立ち上げた国際海上安全保障構想（いわゆる「有志連合」）への参加を求めた。イランとの関係も考慮する日本は有志連合に加盟することは憚られたが、この要請に何らかの形で応える必要は感じており、結局有志連合には加わらない形で独自に海上自衛隊の護衛艦と哨戒機を、情報収集を目的にオマーン湾などに派遣することを決定した。

日本はこの海上自衛隊の中東派遣という動きに対して中東諸国から支持を獲得する必要を感じ、それが2020年1月の安倍首相のサウジアラビアをはじめとした3つの湾岸諸国を訪問した第1の目的となった。首相の訪問に先立って自衛隊の派遣に対する中東諸国の理解を促進するため、河野防衛相が2019年11月にバハレーンで開催されたマナーマ・ダイアログに参加し、派遣の目的について湾岸諸国の防衛関係者に説明した。

首相の湾岸諸国歴訪の第2の目的は、イランをめぐる緊張状態の緩和であった。2019年6月のイラン訪問によって安倍首相はイランの首脳とのパイプを強化し、その立場を利用してあわよくばサウジアラビア・イラン間の対立の緩和にも一役買おうと考えていたと推定できる。ちょうど安倍首相が湾岸諸国を歴訪する直前の1月3日には、イランの革命防衛隊司令官の殺害によって米イラン間の緊張が極度に高まっており、期せずしてこの緊張緩和という議題は非常にタイムリーなテーマとなった。

湾岸諸国歴訪の第3の目的は、訪問した各国との経済分野を中心とした二国間協力に関する協議である。たとえば、サウジアラビアとの間では「日・サウジ・ビジョン2030」という協力枠組みがあり、それを通じた協力関係を確認する意味も込められていた。

このように、サウジウアラビア訪問の第1、第2の目的はともに湾岸地域の安全保障に関するものであった。2020年1月12日に開催された日・サウジ首脳会談の出席者を見ても、外交・安全保障分野の担当者が多く、日本がいかにかこの分野について協議しようとしていたかが伝わってくる（図表1）。

図表 1：日・サウジ首脳会談出席者

日本	サウジアラビア
安倍晋三 首相 岡田直樹 内閣官房副長官 木原稔 内閣総理大臣補佐官 北村滋 国家安全保障局長 今井尚哉 内閣総理大臣秘書官 上村司 駐サウジアラビア大使 森健良 外務審議官 金杉憲治 外務審議官 田中繁広 経済産業審議官 鈴木浩 首相秘書官 高橋克彦 外務省中東アフリカ局長 辻昭弘 外務省中東第二課長	サルマーン 国王 フェイサル・ビン・バンドル リヤード州知事 マンスール・ビン・ムトイブ 国務相 アブドゥルアジーズ エネルギー相 フェイサル 外相 エイバーン 国務相 ジャドアーン 財務相 トワイジェリー 経済企画相 タミーム・サーレム 国王私的秘書 ナーイフ・ファハーディー 駐日大使

注：出席者は記事に掲載された順に従った⁶。

1.2. 観光地の宣伝をしたサウジアラビア

サウジアラビアは、日本側が提起した論点について概ね支持を表明した。まず、自衛隊の派遣に関しては完全にその趣旨を理解したようである。ムハンマド皇太子も、日本の取り組みを完全に評価すると語った。有志連合への参加を呼びかけられたという点で、実はサウジアラビアは日本と同じ立場にあり、日本の立場は理解されやすかったと考えられる。なお、サウジアラビアも当初はイランを過度に刺激しかねないとして有志連合への参加を留保していたが、2019年9月のサウジアラムコの石油施設への攻撃事件後、米国との一層の連携の必要性を感じ、同連合への参加を決めていた。

サウジアラビアの有識者の見解を見ても、同国が日本の自衛隊派遣を肯定的に捉えたことが確認できる。たとえば、リヤードの国立サウード国王大学のサーレフ・ハスラーン教授は、日本の自衛隊派遣は「対外行動を経済関係に制限するという伝統的な政策からの部分的な離脱を意味する」と指摘し、日本政府が安全保障面の関与を増そうとしている点を正確に描写した。また、ファーイズ・シェフリー諮問評議会議員は、自衛隊の派遣は「アラビア湾、特にホルムズ海峡の航行の安全に寄与する」と述べ、高く評価した。さらに、政治分析家のズハイル・ハールシー氏も、日本の「海軍」派遣は「重要なステップ」で、「イランの攻撃的な態度を拒絶」という政治的メッセージと、「エネルギー供給の安全を守るという利益」を反映していると語り、これも肯定的な評価となった⁷。

⁶ 「二聖モスクの守護者と安倍晋三が地域・国際問題と観光について協議した」『シャルクルアウサト』（2020年1月13日）

<https://aawsat.com/home/article/2079761/%D9%82%D9%85%D8%A9-%D8%AE%D8%A7%D8%AF%D9%85-%D8%A7%D9%84%D8%AD%D8%B1%D9%85%D9%8A%D9%86-%D9%88%D8%B4%D9%8A%D9%86%D8%B2%D9%88-%D8%A2%D8%A8%D9%8A-%D8%A8%D8%AD%D8%AB%D8%AA-%D8%A7%D9%84%D9%82%D8%B6%D8%A7%D9%8A%D8%A7-%D8%>

⁷ 「サウジアラビアと日本は航路の安全確保の重要性を強調」『シャルクルアウサト』（2020年2月14日）
<https://aawsat.com/home/article/2081451/%D8%A7%D9%84%D8%B3%D8%B9%D9%88%D8%AF%D9%8A%D8%A9-%D9%88%D8%A7%D9%84%D9%8A%D8%A7%D8%A8%D8%A7%D9%86-%D8%AA%D8%A4%D9%83%D8%AF%D8%A7%D9%86-%D8%A3%D9%87%D9%85%D9%8A%D8%A9-%D8%AA%D8%A3%D9%85%D9%8A%D9%86-%D8%A7%D9%84%D9%85%>

2月2日付のサウジ資本の衛星放送アラビーヤのウェブ版には、「日本の戦艦が船舶護衛のためオマーン湾へ向かう」という記事が、なぜか護衛艦ではなく空母の写真とともに掲載され、おどろおどろしい印象を与えたが、記事の内容自体は冷静で、自衛隊の派遣の目的が情報収集であること、自衛隊の憲法上の武器使用に関する制約などが詳しく書かれており、日本の政策への理解を促すものとなっていた。このように、概して日本の自衛隊派遣についてはサウジ・メディアでも正確に報道された。

次に、イランをめぐる湾岸の緊張状態の緩和に向けた日本の努力については、サウジアラビアは原則的に歓迎しつつも、日本をこの問題に関する重要なアクターとみなしていたかは疑問である。というのも、安倍首相は具体的にイランという国名を挙げて、地域の国々との緊張緩和の重要性をムハンマド皇太子に強調したが、それに対して同皇太子は「日本の外交努力を評価している」と応えるに留め、イランと自国あるいはイランと米国の仲介役として日本を認識した節は確認できなかったからである。サウジ・メディアの反応も、上述の自衛隊の派遣とは対照的に、あまりこの点については報道が見られなかった。従って、イランとのパイプを生かし、湾岸諸国との間の緊張緩和を買って出ようとした日本の努力は、やや空回りした感がある。

最後に、経済協力を通じた日本・サウジアラビア間の二国間協力については、一様にサウジ政府から支持されており、改めて日本がこの国と関わりを持つ上での重要な土台になっていることが確認できた。たとえば、サルマーン国王とムハンマド皇太子の双方が、「日・サウジ・ビジョン 2030」を通じた協力を高く評価している。また、沖縄の石油備蓄量が今回の訪問で増加したことも成果として報じられた⁸。

他方、サウジアラビアはこの安倍首相の訪問を別の目的で活用しようとしており、それが自国の観光資源の宣伝であった。ムハンマド皇太子は安倍首相との会談の場を同国北西部の観光拠点ウラーに設定し、同国の伝統的なテント施設を首相との歓談の場とした。ウラーは、近郊にある世界遺産マダイン・サーレフを観光する際の拠点であるだけでなく、それ自体も古代都市の遺跡が残る観光地であり、ムハンマド皇太子はその保護・開発を担う王立ウラー委員会の議長も務めている。また、ウラーはサウジアラビアが国際的な観光リゾートとして開発中の紅海プロジェクトの対象地からも近く（図表 2）、同プロジェクトが完遂した暁には、観光客が両方を合わせて観光することを期待している。サウジアラビアは 2019 年 9 月に観光ビザを解禁しており、ムハンマド皇太子が主導する経済改革構想「サウジ・ビジョン 2030」の中でも、観光は将来の有望な重要産業と位置付けられている。

⁸ 「サウジアラビアは日本と周辺国への供給のため、沖縄の石油備蓄を 630 万バレルに引き上げる」『イクティサーディーヤ』（2020 年 1 月 13 日）https://www.aleqt.com/2020/01/13/article_1744496.html

図表 2：ウラーの位置



出所：Google Map をもとに筆者作成

サウジアラビアが観光を今回の訪問の最重要議題と捉えていたことは、サウジ・メディアの報道からも確認できる。たとえば、1月13日付のシャルクルアウサト紙は、安倍首相とサルマーン国王の会談について報じているが、そのタイトルの中にも「観光」の単語が入り、これを重要な議題と認識していたことがわかる⁹。

このように、自衛隊の中東派遣についてサウジアラビアは完全に支持を表明する一方、イランとの仲介者としての役割についてはまだあまり期待しているようには見えなかった。他方、サウジアラビアは今回の訪問を観光業の振興に役立てており、その意味で今回の訪問では日本側とサウジ側で議題の優先順位に差があったことは否めない。

3. 安倍首相の対湾岸外交に対する米国等の専門家の見方¹⁰

こうした安倍首相の地域への2度の訪問の成果について、米国の専門家は議題毎に異なった評価をした。まず、海上自衛隊の派遣については、専門家の多くが支持した。上述の通り、日本は米国が当初要請した有志連合には加わらなかったものの、日本が独自派遣という形でオマーン湾等の情勢について自衛隊の関与を示そうとしたことを、評価する声が聞かれた。たとえば、ある安全保障の専門家は、「自衛隊

⁹ 「二聖モスクの守護者と安倍晋三が地域・国際問題と観光について協議した」『シャルクルアウサト』（2020年1月13日）

<https://aawsat.com/home/article/2079761/%D9%82%D9%85%D8%A9-%D8%AE%D8%A7%D8%AF%D9%85-%D8%A7%D9%84%D8%AD%D8%B1%D9%85%D9%8A%D9%86-%D9%88%D8%B4%D9%8A%D9%86%D8%B2%D9%88-%D8%A2%D8%A8%D9%8A-%D8%A8%D8%AD%D8%AB%D8%AA-%D8%A7%D9%84%D9%82%D8%B6%D8%A7%D9%8A%D8%A7-%D8%A7>

¹⁰ 本章は、米国ワシントン DC における非公開有識者会合（2020年1月13日）、東京における非公開有識者会合（2020年1月28-30日）での議論をもとにした。

の派遣は大きな一歩で、他の国で米国の要請に応えた国は少ない」として高く評価した。また、別の専門家も、「米国は（海洋安全保障上の）協力者を求めている」として、日本の自衛隊派遣を肯定的に評価した¹¹。

次に、日本が米国とイランを仲介するというアイデアについて、米国の専門家の多くはそれがリスクを伴うと警鐘を鳴らした。たとえば、ある専門家は、「日本がメッセンジャーではなくブローカーになることはリスクがある」と語り、米国とイランの利害を調整することは危険であると語った。また、別の専門家は、米国には「イランの問題を政治化するロビー活動が存在する」と指摘、下手に米イラン関係に関与すれば、米国内部のロビー団体の対日評価が悪化し得ると警鐘を鳴らした。また、中東出身の専門家は、「人々は日本の背後に米国がいると考えており、仲介については期待していない」と単刀直入に発言した¹²。

他方で、少数意見ながらも、日本は米イラン間の緊張緩和について、何らかの貢献ができるという意見も見られた。たとえば、ある米国の専門家は、「日本は米国・イラン交渉の再開を促すことができる。また、トランプ政権にイランへの圧力を弱めるよう説得することもできる」と発言した。また、「何らかの仲介を行うのであれば、単独で行うのではなく、同様の試みをしている他国と協力することによって、より効果を発揮できる」として、具体的な連携候補国としてサウジアラビアとイランを行き来しているパキスタンとの連携を勧める声も聞かれた¹³。

おわりに：湾岸地域に対して日本に何ができるか

2020年9月には日本で菅政権が発足し、2021年には米国で民主党のバイデン政権が発足した。このように、日本の安倍首相が積極的な対湾岸外交を展開していた2019年から2020年初頭にかけての時期から役者が大きく変わった。しかし、安倍政権が取り組んだ積極的な対中東外交はサウジアラビアの有識者の間などでも記憶に留まっており、日本に対する期待は一定程度存在し続けている。

また、米国でバイデン政権が成立したことで同国の中東政策も大きな変容が予想されていたが、意外にも安倍首相が2019年から2020年にかけて積極的な対湾岸外交を展開した時と現在は状況が重なりあう兆候さえ見られている。バイデン政権の呼びかけにも関わらず、米イラン関係は緊張を続け、イランと近い勢力であるフーシー派はサウジアラビアの石油施設に対する攻撃をしかけており、2019年9月のイランによるとされるサウジアラビアの石油施設への攻撃を彷彿させている。こうした中、日本としての役割も再び現れてくるだろう。

もちろんそれは安倍・トランプ時代のように米国大統領の個人的な使命を帯びて日本の首相がイランに対してメッセンジャーになるという形式は考えにくい。むしろ、バイデン大統領は個人的なつながりというよりは官僚機構や同盟関係といった制度的な結びつきを重視する指導者であり、日本とはQUADの一員という認識で結束を強めている。もちろんこれは第一義的には中国を意識した連携であるが、こ

11 米国ワシントン DC における非公開有識者会合（2020年1月13日）における議論

12 米国ワシントン DC における非公開有識者会合（2020年1月13日）と、東京における非公開有識者会合（2020年1月28-30日）における議論

13 米国ワシントン DC における非公開有識者会合（2020年1月13日）における議論

の枠組みを通じて深めた対米関係を梃に、菅首相が中東へのアプローチを強めることも可能であろう。中国との競合関係はアジア太平洋地域だけではなく、中東でも展開されているものであり、その意味で米国も日本のアプローチを歓迎するだろう。そして、日本は安倍首相の時代に示したように、対イラン関係など米国が有さないチャンネルを利用してこの地域の問題に関与する余地は十分ある。常に関与することによるリスクを意識しつつも、可能な範囲で能動的に地域の情勢に関与していくことが望まれる。

サウジアラビアとの関係については、米国は皇太子の人権問題などがあってトランプ時代ほどの親密さを有していない。日本も米国の態度には配慮する必要があるが、経済協力を梃に築き上げた同国との太いパイプを十二分に活用し、この中東における最大のエネルギー大国を引き続き地域の平和と繁栄の柱にすべく、米国と共に支援していくべきであろう。中東湾岸地域に対するエネルギー依存度の高い日本と、同地域に対して依然として安全保障面で強大な影響力を有する米国は相互補完的な形でこの地域の多様な政治・経済問題への対処が可能なはずであり、その意味で政策的協議を今後も継続していくことが望ましい。

7. Destabilization in the Middle East and Its Impacts on Japan’s Energy Security

Amane Kobayashi

Introduction

This paper explores the impact of increasing uncertainty in the Middle East and global energy trends on Japan’s energy security.¹

In recent years, the situation in the Middle East has been unstable; the countries in the region are facing mounting tensions, and unpredictable armed conflicts have begun to occur. As Japan relies on the Middle East for crude oil and natural gas supplies, the instability in the region has a serious impact on Japan’s energy security and economy. On the other hand, in the present circumstances, it is not easy for Japan to realize a “fossil fuel-free society” or “independence from the Middle East” in the short term. Consequently, Japan needs to create a system capable of responding to the destabilization of the political and security situations in the Middle East, assuming that dependence on the region for its energy resources will continue into the foreseeable future. In such a case, Japan’s contribution to stabilizing the Middle East will become more important.

1. Increasing Uncertainty in the Middle East and Decreasing US Involvement

The strategic environment in the Middle East is rapidly changing, such as in regard to the reduction of US involvement in the region, the expansion of Russia’s military presence, and China’s political and economic advancement. In particular, the United States under the Trump administration is reducing its involvement in the Middle East and is abandoning its role as a “mediator.” These US moves have a significant political and security impact. On the other hand, Russia is increasing its military presence in the region through military intervention in the civil war and construction of military bases in Syria as well as sales of weapons and military supplies. Notably, the Middle East is vital for China’s Belt and Road Initiative.

In this changing environment, countries in the Middle East have developed their own foreign and security policies, but their pursuit of national interests has hindered regional stability. Furthermore, multiple structures of conflict and cooperation have emerged --- Israel versus Iran and pro-Iran powers, Iran and the Gulf Arab States, and Saudi Arabia/UAE/Egypt and Qatar/Turkey. As a result, regional cooperation frameworks such as the Gulf Cooperation Council (GCC) have failed to function. Moreover, the governments of Yemen, Libya, and Syria became fragile because of the civil wars

¹ This report focuses, unless otherwise specified, on the situation before the global spread of the novel coronavirus disease (COVID-19).

following the “Arab Spring” and are incapable of border control and maintaining security. Under these circumstances, powerful non-state actors have emerged such as Hezbollah (Lebanon), Hamas (Palestine), Houthi (Yemen), Kurdish militants (Iraq and Syria), anti-government forces (Syria), and Shiite militias (Iraq). They have acquired a level of influence comparable to that of regional states.

As described above, because countries in the Middle East prioritize national interests rather than regional stability, the mechanisms for the resolution of regional disputes do not function. While the government has weakened in some countries, the emergence of non-state actors has heightened the probability of accidental military collision. In addition, as the channels of dialogue between conflicting states have narrowed, the possibility of escalation of conflicts has increased through the cycle of collisions.

There have been numerous significant changes in US energy and Middle East policies. The Trump administration pledged “An America First Energy Plan” and promoted the maximum use of domestic energy resources, the termination of dependence on oil imports, the relaxation of environmental regulations on fossil fuel production, the creation of employment through the maximization of shale oil and gas production, the development of clean coal technology, and the regeneration of the coal industry.² Owing to the increase in shale oil and gas production, the United States is expected to become a net petroleum exporter in 2020 and remain as such until 2050.³ The US is likely to link this superiority in energy supply and demand with its diplomatic policy, particularly toward the Middle East. In other words, as long as its energy security is maintained with robustness against external risks, the United States will likely adopt a harsh or unilateral foreign policy. The US’s harsh policy toward Iran is an example of the linkage between its energy and the Middle East policies.⁴ The United States has shown a keen interest in maintaining oil and gas prices but is not committed to securing a sea lane for a stable energy supply due to the belief that such efforts to protect freedom of navigation constitute a one-sided burden on the United States. Therefore, it is demanding “burden sharing” from its allies and partners.

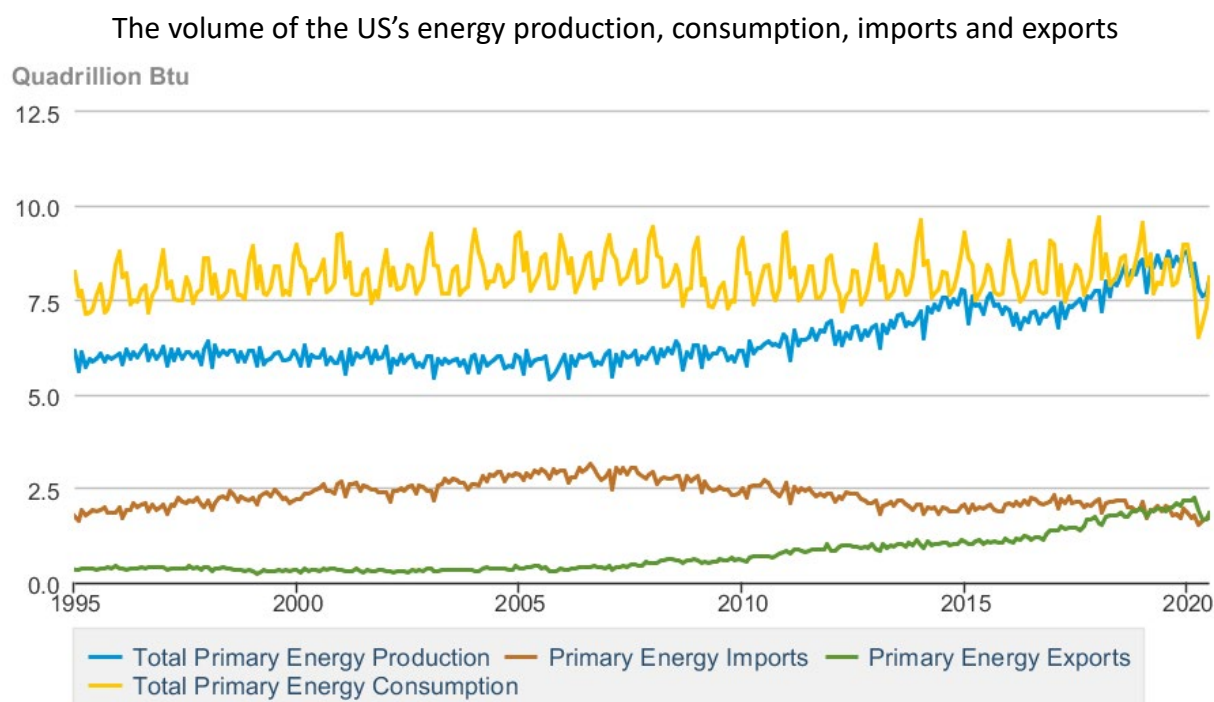
“Energy independence” will diminish the strategic importance of the Middle East for the United States. The US’s interests in the Middle East are not limited to oil and gas but also relate to other economic interests, alliances and partnerships, US military bases, and troops in the region. Although not directly related to energy security, US energy companies operating in the Middle East are also important elements. However, the necessity for the US to contribute to the stabilization of the Middle East,

² <https://www.whitehouse.gov/america-first-energy>; Nakano, Jane, Energy Opportunities under the Free and Open Indo-Pacific Vision, December 10, 2018, <https://www.csis.org/analysis/energy-opportunities-under-free-and-open-indo-pacific-vision>.

³ EIA, Annual Energy Outlook 2019.

⁴ According to the author’s interviews with US experts on the Middle East (January 2020).

bearing risks and costs solely for its energy security, is diminished.



At present, neither the United States, Iran, Israel, nor Saudi Arabia wants to start war. The Trump administration does not hesitate to use force in the Middle East, as evidenced by its conduction of the assassination of major general Qasem Soleimani of the Islamic Revolutionary Guard Corps of Iran, the killing of Abu Bakr Baghdadi of the Islamic State (ISIS), and the missile attacks in Syria. On the other hand, the administration has so far restricted its attacks on limited targets and avoided escalation to full-scale war. If, however, Iran, Israel, or Saudi Arabia miscalculates or tries to put pressure on rivals, or if a non-state actor suddenly conducts an armed attack, a single conflict may invite an overreaction among the parties concerned and escalate into an “unwanted war” in the region.⁶

2. Japan's Vulnerable Energy Security

With the growing uncertainty in the Middle East, Japan's energy security is becoming increasingly

⁵ U.S. Energy Information Administration, *U.S. Primary Energy Overview*, <https://www.eia.gov/totalenergy/data/browser/index.php>, last accessed on November 18, 2020.

⁶ Malley, Robert, “The Unwanted War: Why the Middle East Is More Combustible Than Ever,” *Foreign Affairs*, vol.98, No.6, pp.38-46, 2019.

vulnerable, as it relies heavily on the crude oil and natural gas supply from the region.

The most important task of each country in formulating its energy policy is to maintain a desirable balance among stable energy supply, economic efficiency, and the environment, while giving primary preference to safety. To achieve a stable energy supply, it is necessary to secure a constant procurement of energy resources, such as oil and gas, and maintain a sustainable energy supply.⁷

Japan depends on imports from abroad for most of its energy resources, such as crude oil, natural gas, and coal. In addition, there are technical, economic, and social challenges for introducing large-scale renewables and nuclear energy. Japan's energy self-sufficiency rate was maintained at 20% in the 2000s. However, when nuclear power generation decreased after the 2011 Great East Japan Earthquake, it temporarily dropped to 6%. In recent years, the self-sufficiency rate has recovered due to the increase in power generation by renewables, a partial resumption of nuclear power plant operation, and the progress of energy saving. However, it remains less than 10% as of 2020.

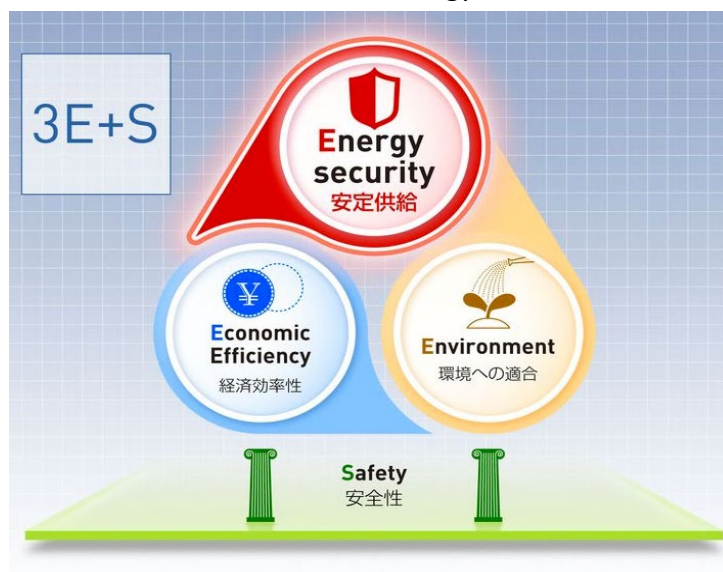
Japan's geographic and climatic conditions make it difficult to secure a stable energy supply. Geographically isolated, Japan maintains no energy infrastructure connected to neighboring countries; therefore, it is nearly impossible to borrow energy resources and electricity from its neighbors, as is the case in European or Eurasian countries. Moreover, due to recent tensions in the East and South China Seas, the security of sea lanes for transporting energy supplies may be threatened in the event of an emergency.⁸ Climatically, frequent major natural disasters coupled with aging energy infrastructures have led to an increase in the disruption of the domestic energy supply.⁹

⁷ https://www.enecho.meti.go.jp/about/special/johoteikyo/3es_graph01.html

⁸ The Japan Institute of International Affairs, "Japanese Resource Diplomacy and Energy Cooperation," March 2016, http://www2.jiia.or.jp/pdf/resarch/H27_Energy/h27_Japan_s_Resource_Diplomacy_and_Energy_Cooperation_fulltext.pdf; Shoji, Tomotaka, "The South China Sea: A View from Japan," *NIDS Journal of Defense and Security*, No.15, December 2014, http://www.nids.mod.go.jp/english/publication/kijo/pdf/2014/bulletin_e2014_7.pdf.

⁹ Agency for Natural Resources and Energy, "'Typhoon' and 'Electricity': Resilience of Electricity Viewed from Long-term Power Failure," January 23, 2020, <https://www.enecho.meti.go.jp/about/special/johoteikyo/typhoon.html>.

3E + S in Energy



Source: Agency for Natural Resources and Energy¹⁰

Under such circumstances, the increasing geopolitical risks in the Middle East constitute a major risk to the energy security of Japan, which imports more than 80% of its crude oil and about 30% of its natural gas from the region. The option of reducing dependence on the Middle East for crude oil and natural gas imports to avoid risks could be argued. However, it appears difficult to decrease Japan's energy dependence on the Middle East in a short period of time.

First, the Middle East holds about half of the world's proven crude oil reserves and has a sizable export capacity. It is, therefore, possible for importers, particularly international oil companies, to purchase and load large quantities of crude oil efficiently. Additionally, the production cost of crude oil in the Middle East is the lowest in the world. In oil-producing countries other than the Middle East, costs relating to the exploration and production of crude oil often fluctuate, making it difficult to secure a stable amount of oil over the long term.¹¹ The costs of crude oil transportation to Asian countries, including Japan, from the Middle East are also relatively cheaper, considering their geographical location.

As Japan has long imported large quantities of crude oil from the Middle East, many Japanese refineries have been designed and operated chiefly to refine Middle Eastern crude oil. Therefore, it is not easy technically or economically to increase imports of crude oil from areas other than the Middle

¹⁰ https://www.enecho.meti.go.jp/about/special/johoteikyoo/3es_graph01.html

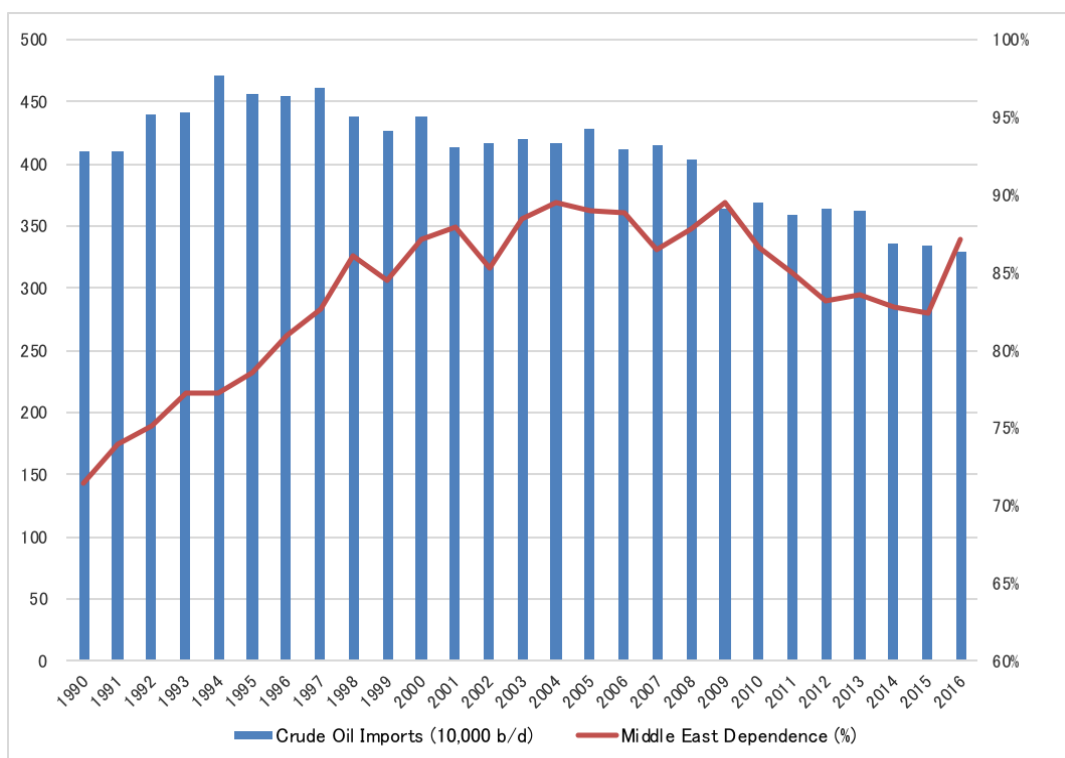
¹¹ The Institute of Energy Economics, Japan, "Survey Report on The Environment Surrounding the International Crude Oil Markets and Factors Affecting Price Formation," February 2017, pp. 15-17.

East. In addition, the Japanese government is legally not in a position to impose restrictions on private oil companies to reduce their dependency on the Middle East. This is not the case in China, for instance, where the government can control and issue orders to private sectors according to its policy.

Some Middle Eastern oil-producing countries, particularly Saudi Arabia, manage their oil production capacity to balance supply and demand in the global oil market. Thus, they are ready to meet urgent demand for additional supplies. Oil-importing countries, including Japan, need to maintain a good relationship with Middle Eastern oil-producing countries with surplus production capacity so that they are able to secure a stable supply of crude oil in an emergency.

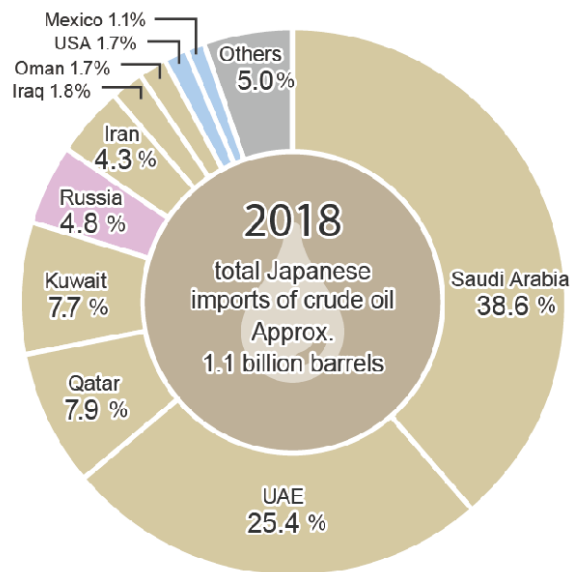
Japan’s crude oil imports have decreased by 1.5 million barrels per day (b/d) since the mid-1990s. It is estimated that oil demand will continue to decline because of the decreasing population and the development of energy-saving technologies. On the other hand, even if crude oil imports and consumption decrease in Japan, its dependency on the Middle East is unlikely to decline in the short term for the aforementioned reasons. Even if a decrease in demand for petroleum products could be set off by the reduction of crude oil imports from the Middle East, the dependency would not drop by more than 70%.

Japan’s Crude Oil Imports and Its Dependency on the Middle East



Source: Created from data from “Yearbooks / Monthly Reports of Mineral Resources and Petroleum Products Statistics” published by the Agency for Natural Resources and Energy.

Origins of Japan's Crude Oil Imports (2017)



* Crude oil imports from Iran have been suspended since May 2019.

Source: Agency for Natural Resources and Energy¹²

3. Energy Geopolitics and the Strait of Hormuz

As mentioned above, Japan's energy self-sufficiency rate is still less than 10%, and its high level of dependency on the Middle East for crude oil supply is likely to continue. Therefore, political and security instability in the Middle East would have a significant impact on Japan's energy security. Japanese citizens and interests have been involved in terrorist attacks, insurgencies and armed conflicts in the region. For example, in the In Amenas hostage crisis in 2013, armed groups attacked natural gas facilities in southern Algeria and killed 10 Japanese citizens. In June 2019, a tanker owned by a Japanese shipping company was attacked while sailing near the Strait of Hormuz. These incidents highlight the potential risk that instability in the Middle East constitutes a direct threat to Japanese interests.

Robert Kaplan noted that it is necessary to focus on the places of energy supply and consumption and transportation routes connecting them to understand the geopolitics of energy. Kaplan stressed the importance of the concepts of chokepoints and sea lanes.¹³ Energy geopolitics is an idea that

¹² Agency for Natural Resources and Energy, "2019 – Understanding the current energy situation in Japan," August 13, 2019, https://www.enecho.meti.go.jp/en/category/special/article/energyissue2019_01.html.

¹³ Kaplan, Robert D., "The Geopolitics of Energy," *Forbes*, April 4, 2014, <https://www.forbes.com/sites/stratfor/2014/04/04/the-geopolitics-of-energy/#730629c3b39e>.

does not necessarily assume classic strategic competition between nations but, rather, provides perspectives combining geopolitics, international security, and national strategies, as a stable energy supply is essential for a nation's survival and prosperity.

From the perspective of energy geopolitics, it is necessary to consider not only the destabilization of oil- and gas-producing countries in the Middle East but also the various risks of supply disruptions and market destabilization. Such risks include the destabilization of transportation routes, large-scale natural disasters, and armed conflicts. In the Middle East, there are several crude oil chokepoints: the Strait of Hormuz, the Strait of Bab el-Mandeb, and the Suez Canal. Thus, it is vulnerable to supply disruptions caused by political upheavals and conflicts. In addition, such supply disruption would easily lead to a sharp rise in crude oil prices if the surplus production capacity of oil-producing countries responsible for urgent additional production is insufficient or if international cooperation for managing stocks of crude oil is inadequate.¹⁴

In particular, the Strait of Hormuz is extremely important as a chokepoint for global oil and gas transportation. The strait is the passing point for crude oil exports from the Persian Gulf coasts to various destinations around the world; between 2016 and 2018, 21% of global crude oil and petroleum products exports passed through the Strait of Hormuz. Transportation to Asia has increased, while Europe and the United States have decreased the amount of their oil imports that travels through the strait. In particular, Japan and South Korea are highly dependent on transportation via the Strait of Hormuz: 85% of crude oil and 30% of liquefied natural gas (LNG) for Japan as well as over 70% of crude oil and some 40% of LNG for South Korea pass through the strait. On the other hand, Chinese dependence on Middle Eastern crude oil imports is about 30% because Beijing can force Chinese oil companies to diversify their sources of crude oil imports. Therefore, the risks for their energy security if China were to be involved in a crisis in the Hormuz Strait would be relatively lower than for Japan's or South Korea's.

Transportation routes that can function as alternatives to the Straits of Hormuz include 1) the East-West pipeline (the Petroline) that runs across Saudi Arabia and 2) the UAE Habshan-Fujairah pipeline. Saudi Arabia attempted to avoid concentrating hubs for energy exports and industries in the coastal areas of the Persian Gulf facing Iran and engage the Red Sea to hedge risks. In 1981, the East-West Pipeline, an oil and gas route bypassing the Strait of Hormuz, was completed. As of 2016, the pipeline is estimated to have a transportation capacity of 4.8 million b/d and a surplus oil transmission capacity of 1 to 2.8 million. Likewise, in 2012 the UAE also initiated the operation of the Habshan-Fujairah pipeline with a transportation capacity of 1.5 million b/d, which has enabled the UAE to transport crude oil without passing through the Strait of Hormuz.

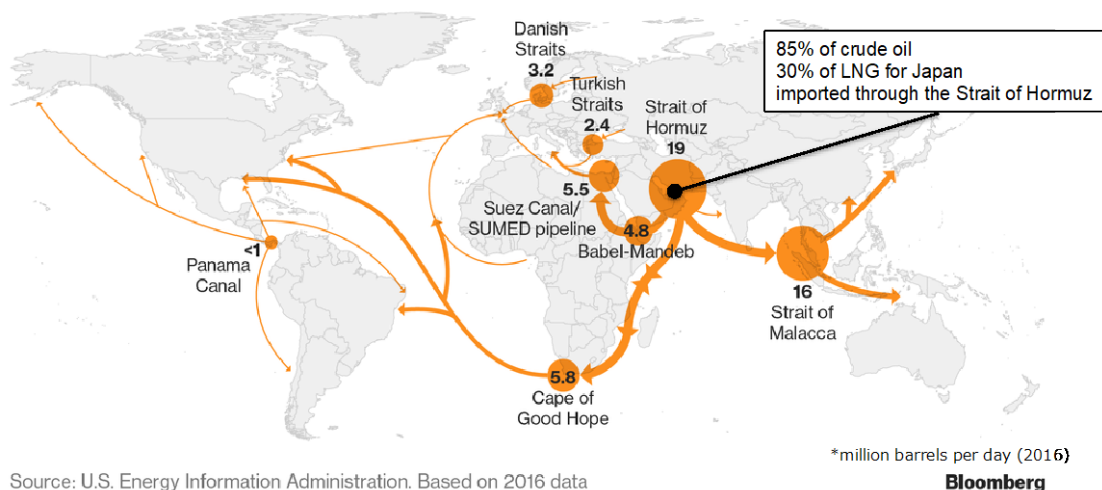
¹⁴ The National Institute for Defense Studies (2009), "Climate Change, Energy, Food Problems and Security," "East Asia Strategy Review," pp. 56-57.

However, even with the use of the aforementioned alternative transportation routes, the security risks of the Strait of Hormuz would not be eliminated. First, the total transportation capacity of the two pipelines is approximately 8 million b/d, which is much less than the 17 million b/d of maritime transportation through the Strait of Hormuz. In addition, if a large-scale armed conflict occurred around the strait, it would involve the two alternative pipelines, and oil, shipping, and insurance companies would limit their activities in consideration of the regional situation. As a result, the oil supplies needed for the Japanese economy could not be loaded or transported from the Middle East. In addition, the waters around the Red Sea are also fraught with risks because of the instability in Yemen and Somalia and the existence of another chokepoint, the Strait of Bab el-Mandeb.

World Maritime Oil Checkpoints

Daily Transit Volumes Through World Maritime Oil Chokepoints

All estimates in million barrels per day. Includes crude oil and petroleum liquids.



Estimates in million barrels per day, based on 2016 data.

Source: Created based on Bloomberg¹⁵

4. Mounting Geopolitical Risks and Challenges for Japan

Despite the increase in geopolitical risks in the Middle East, the global oil and gas market remains nearly unresponsive and calm. This is because the market has been oversupplied, and concerns regarding the deteriorated global economy were greater than those regarding the geopolitical risks. On September 14, 2019, there was a large-scale attack, presumably using cruise missiles and drones, against oil facilities in Saudi Arabia. The United States and Saudi Arabia suggested Iran's involvement

¹⁵ Lee, Julian, "Bab el-Mandeb, an Emerging Chokepoint for Middle East Oil Flows," *Bloomberg*, July 26, 2018, <https://www.bloombergquint.com/markets/bab-el-mandeb-an-emerging-chokepoint-for-middle-east-oil-flows>.

in the attack, but this was not proven. Immediately after the incident, Brent crude oil prices rose sharply from around \$60/barrel to \$69/barrel but soon dropped following Saudi Arabia's announcement of a quick recovery plan. Another factor preventing the rise in oil prices was shared concerns regarding the risk of the deterioration of the global economy, including the US-China trade war. In October of the same year, despite security risks increasing as tankers navigating the Red Sea were attacked, crude oil prices only minimally fluctuated.

Current market trends suggest that it is unlikely that crude oil prices will rise significantly in the short term. However, the quantity of oil supply disruption caused by the September 2019 attack on oil facilities in Saudi Arabia amounted to 5.7 million b/d at most. This amount is comparable to that at the time of the Iranian Revolution in 1979 and bigger than the supply disruption during the 1973 Arab oil embargoes (4.3 million b/d) or the 1990 Gulf War (4.3 million b/d). The September 2019 incident may have drastically increased crude oil prices in the case of tight supply and demand in the market.

Saudi Arabia has a capacity of 4 million b/d of surplus crude oil production, which is the largest in the world. The total surplus production capacity of the OPEC member states, except Saudi Arabia, was less than 1 million b/d. In other words, Saudi Arabia is the most important country that can stabilize the oil market through production adjustment. If the country is attacked and its production capacity suddenly drops, no other countries can adjust the global supply-demand balance of crude oil. Although the impact of recent incidents on the oil market was limited, the implications of possible armed conflicts in the Middle East for mid-term or long-term energy security should not be discounted.

Although it is unlikely that an all-out war involving multiple countries would occur in the Middle East in the short term, the regional countries are in a persistent state of tension, and an armed conflict could suddenly occur that involves Japanese citizens and interests. Since January 2020, the Japanese government has dispatched the Self-Defense Forces to the northern part of the Arabian Sea, the Gulf of Aden, and Djibouti to gather information. As the tensions in the Middle East are not transient, preparedness for emergency response is essential. In addition to the collection and analysis of information regarding energy geopolitics, it is also necessary to analyze the impact of revolution in military affairs such as cyber security and drone capability on the regional security situation.

If the crude oil supply from the Middle East is disrupted or sharply declines, competition with other countries to secure crude oil supply would intensify. Therefore, it is necessary for Japan to reserve sufficient amounts of crude oil. Currently, Japan maintains crude oil reserves equivalent to 238 days of consumption, including private and governmental reserves and joint stockpiles with oil-producing countries.¹⁶ However, as the government-stockpiled oil has never been released, it is critical to

¹⁶ Joint stockpiling with oil-producing countries: Japan is leasing crude oil tanks in Okinawa and Kagoshima to the UAE's Abu Dhabi National Oil Company and the Saudi Arabian Oil Company (Saudi Aramco) to store the crude oil of both

improve the system to secure a stable and smooth supply of stockpiled oil in case of an emergency.

Paradoxically, despite the unstable political and security environment in the Middle East, the prices of crude oil and natural gas do not fluctuate. Thus, this is a critical time to reconsider Japan's policies toward the Middle East and energy security. Japan's contribution toward easing tensions in the Middle East would help reduce the risk of conflict in the short term and achieve energy security in Asia, including Japan, in the longer term. In this sense, the "Free and Open Indo-Pacific (FOIP)" vision/strategy could function as a geo-strategy for Japan's engagement in the Middle East by combining economic, diplomatic, and security aspects with a multilateral cooperation framework. In other words, through the FOIP vision/strategy, Japan and other countries could collaborate to stabilize the Middle East, sharing the macro perspective of sea lane safety and energy security in Asia.

Conclusion: "Two Shocks" Attacking the Middle East

This paper examined the impact of increasing volatility in the Middle East and global energy trends on Japan's energy security. Finally, I would like to look at the "two shocks" currently prevailing in the Middle East --- the spread of the new coronavirus infection and the plummeting crude oil prices.

In April 2020, the World Bank drastically reduced its annual economic outlook for the Middle East and North African region from 2.6% (as of October 2019) to -1.1%. Global economic stagnation and movement restrictions due to the novel coronavirus infection will shrink the demand for oil and natural gas. Therefore, the economic growth of major oil-producing countries is expected to be adversely damaged, including Saudi Arabia (0.2%), UAE (-1.1%), and Iran (3.7%). The outlook for non-oil-producing countries is more severe because of the pandemic's stagnating effects on tourism, manufacturing, and remittances from oil-producing countries; these include Lebanon (-10.9%) and Tunisia (-4.0%). The Expo 2020 Dubai, which was scheduled for October 2020 in the UAE, has been postponed for one year, and a dark cloud is hanging over the upcoming G20 Summit in Riyadh, Saudi Arabia.

In addition, the collapse of the coordinated production cut among oil-producing countries and the sharp drop in oil prices are exacerbating the situation. On March 6 of 2020, the negotiations of OPEC-plus, including Russia, for cutting oil production broke down. Soon after, Saudi Arabia announced a large-scale production increase, and crude oil prices plunged to under \$20 per barrel. On April 12, OPEC-plus agreed on the largest ever production cut of 9.7 million b/d, but due to the decrease in global demand accompanied by the spread of the new coronavirus infection, the WTI crude oil price

companies. Normally, those tanks and their contents serve as both companies' supply and storage bases for their business in East Asia. If there is a shortage of oil supply to Japan in the event of a crisis, Japan will have a preference to purchase the crude oil in those tanks.

temporarily recorded a negative sign on April 20. At present, not only countries in the Middle East and Russia but also the United States have been facing a huge crisis due to declining oil prices. The leaders of these countries seem to be continuing efforts to stabilize oil prices that are favorable for their oil and gas industries, but the decline in global energy demand is predicted to be prolonged as well as to expand.¹⁷

Oil export revenues account for a greater portion of the financial revenues of major oil-producing countries in the Middle East. The countries share the serious concern that their economies would slow down because of the reduction in government expenditures resulting from diminishing oil revenues. Non-oil-producing countries are likewise affected by the economies of the oil-producing countries as they receive investment and assistance from oil-producing countries and provide them with labor to earn revenues from foreign remittances. Crude oil that is too cheap could not only induce political and economic destabilization in both oil-producing and non-oil-producing countries but also impede necessary energy investment and threaten damaging global energy security in the medium to long term.

¹⁷ Ken Koyama, "Disappearing demand, destructive adverse effects on oil-producing countries," the Nikkei, April 24, 2020, <https://www.nikkei.com/article/DGXMZO58404130T20C20A4TCR000/>

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