JINSA
The Jewish Institute for National Security of America

Partners in Production:
U.S.-Middle East Cooperation to Enhance Our Collective Defense Industrial Base

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I. Executive Summary

America's global security challenges are more complex and volatile than at any point since World War II. The rapid pace of change, significant geopolitical disruption, and deepening alignment of our adversaries are among the defining characteristics of the strategic landscape. In this environment, the United States and our allies are challenged to effectively deter conflict and respond if deterrence fails. One of the specific challenges we must address is the lack of capacity in our collective industrial base.

The recent conflicts in Ukraine and Gaza have highlighted the inability of the current U.S. and allied defense industrial base (DIB) to meet the demands of high-end combat operations. The challenge is particularly acute if we consider the need for the United States to engage in extended conflict or support simultaneous combat operations in multiple geographic regions. The shortfalls in critical munitions, missile defense capacity, space assets, and other core combat requirements are well documented. While there are a number of interdependent variables that affect deterrence and the ability to win a conflict if deterrence fails, an adequate DIB is foundational.

Growing the capability and capacity of the DIB to support the United States, our allies, and our partners will require a global approach. But there is a unique opportunity now to enhance the capacity of our partners in the Middle East, and thus our collective capacity as well.

Our Middle East partners have all expressed the need to bolster their capabilities to defend themselves. They have also significantly increased their defense spending. The United States can help accelerate these positive trends by supporting our partners in developing and maintaining sufficient defense production capacity, resilient supply chains, and access to technology. Working closely with partners including Israel, Saudi Arabia, the United Arab Emirates (UAE), and Bahrain will bolster regional security and stability, and contribute to solving the aggregate global DIB challenge. Effective allies and partners relieve the burdens on U.S. forces and enhance our collective deterrence and warfighting capabilities. A full range of solutions should be considered here, including technology transfer, streamlined processes for U.S. Foreign Military Sales (FMS), and co-production initiatives to enhance the DIB among our Middle East partners.

A. Strategic Context

Great powers China and Russia, nuclear-armed or threshold powers North Korea and Iran, and other nations are now aligning in meaningful ways. The mutual political support, technology transfer, intelligence sharing, and material assistance amongst these countries present a threat to the national security interests of the United States and our allies and partners. This current and future challenge was illuminated by the difficulties experienced by the U.S. DIB in supporting simultaneous combat operations in Ukraine and Gaza, while still meeting the requirements for U.S. forces and other allies and partners. NATO's secretary general captured the problem well in summer 2024 when he warned the alliance's arsenals "have been too small, the production capacity has been delinquent, and [there are] serious gaps in our interoperability. There is no way to provide a strong defense without a strong defense industry."[1] The challenge would be much greater were the United States required to fight in one or more protracted, high-end combat operations.

To this point, recent war games and studies project U.S. munitions stocks will last mere weeks in a great power conflict, and will take years to replenish.[2] American policymakers and strategists speak explicitly of how this situation undermines "deterrence by endurance," inviting aggression by adversaries who have good reason to doubt our capacity to sustain wars of attrition. Most succinctly, the 2024 National Defense Strategy Commission warned that "failure to restore the former might of U.S. defense production capability and capacity … would gravely erode the credibility of U.S. deterrence, undermine U.S. support to allies and partners in a crisis or conflict, and leave the Joint Force ill-prepared and ill-equipped to fight and win a conflict."[3]

B. New Strategy for Partnerships, Presence & Production

These challenges associated with our broader defense industrial capacity must be addressed with a sense of urgency. We highlight the Middle East in this report, both because of the very real opportunity in the region, and because of the current risks to our national interests posed by Iran's nuclear program, threats to the free flow of regional energy resources and to the global economy, the dangers of violent extremism, and the increasing malign influence of outsiders in the region. While it would take significant time to develop new sources of industrial capacity for sophisticated platforms and munitions, America's close friends in the region have the drive, capital, human capital, and critical resources to immediately establish domestic production for many of the munitions, materials, and platforms where current capacity is unable to meet global demand. This could conceivably include everything from raw materials, shells, fuses, and propellant charges for 155mm artillery rounds to unmanned aerial systems (UAS) and other requirements.

Of course, there already exist significant capacity and models in the Middle East to serve as a foundational element of an expanded regionwide effort. Israel's high-technology defense sector conducts joint research, development, and production with U.S. companies, most notably on air and missile defenses like Iron Dome, David's Sling, and Arrow. In light of global munitions and materials shortages, Israel also is expanding its defense industrial capacity and positioning itself to help fill some of these aforementioned gaps. Saudi Arabia and the UAE are equally ambitious. They are working to diversify global supply chains for critical minerals and other strategic materials away from China's near-monopoly control and the dangerous geopolitical leverage that comes with it. Both countries also are devoting massive investments, and courting joint ventures with Western firms, to expand their domestic production capacities for everything from raw materials and counter-drone systems to components for interceptors and warships. As part of its "Vision 2030" program of economic diversification, for example, Saudi Arabia aims to devote fully half of its nearly $80 billion annual defense budget to co-producing defense systems at home.[4]

The Pentagon and U.S. defense companies already conduct high-level "production diplomacy" with allies in Europe and the Indo-Pacific to bolster resilience and overall output, including initiatives to decouple vulnerable supply chains from Chinese control, increase co-production and technology-sharing with allies, and coordinate procurement. And America continues to display equally vital leadership to expand defense capabilities and capacities in the Middle East. The transformational Abraham Accords and the Pentagon's reassignment of Israel to U.S. Central Command's (CENTCOM) area of responsibility have boosted regional collaboration to previously-unimagined levels, even in the face and fallout of

catastrophes like October 7. The underlying possibilities for even deeper coordination were reflected in many of the discussions and initiatives identified during President Trump's May 2025 visit to the region, including signing a major U.S.-UAE defense partnership focused on enhanced interoperability and joint research and development. They can also be seen in the continued push for Israel-Saudi normalization and more formal U.S.-Saudi defense ties, reportedly including provisions to strengthen the kingdom as an asset in the larger great power competition with China and Russia.[5]

C. Recommendations

Working with Congress, defense companies, and our partners, the Trump administration has a valuable opportunity to build a more resilient and productive DIB to meet our needs and those of our critical partners around the world. Equally important, this will benefit the United States from an economic perspective while enhancing our aggregate defense industrial capacity. Initiatives in these areas are consistent with, and can build upon, the priorities and initiatives spelled out on President Trump's recent Middle East trip. They are also complementary to our ongoing regional diplomatic efforts, and would build upon the Abraham Accords, support Israel-Saudi normalization, and enhance security and stability while making America's regional presence more sustainable. As part of a larger deal to secure Israel-Saudi normalization, a potential U.S.-Saudi mutual defense treaty could enable much more rigorous bilateral defense industrial cooperation, along the lines of ongoing U.S. efforts with European and Indo-Pacific allies.

Capitalizing on this high ceiling for mutually-beneficial growth, and doing so with an urgency to match the pressing challenges from our shared adversaries, also entails a dose of pragmatism. The United States and its regional partners should adopt a "crawl, walk, run" approach that starts with relatively simple but crucial efforts to initiate joint procurement and co-production of basic but critical minerals and strategic materials, components for weapons systems, and attritable munitions. These endeavors can then generate momentum toward more ambitious joint efforts.

To this end, the Trump administration should streamline its approach to FMS and examine the legal and policy limitations in America's existing export control regime embodied in the International Traffic in Arms Regulations (ITAR). As per U.S. law, the Executive Branch and Congress can and must work together here, to come up with viable options to legislate and sign into law export control reforms. Progress on this front can help change bottom-line incentives for U.S. defense industry to view the Middle East, like it already does Europe and the Indo-Pacific, as an opportunity to boost global defense industrial capacity and resilience.

A specific approach for the United States and its Middle East partners could look like this:

Crawl, Walk, Run: A Realistic Path to More Capable Middle East Partnerships JINSA		
Low-hanging fruit ↓ Longer-term projects	**Critical Opportunity for Cooperation**	**Potential U.S. Partner(s)**
	Raw materials procurement/strategic materials production	Israel, Saudi Arabia, UAE
	Co-production: propellant charges/fuses for 155mm shells	Israel, Saudi Arabia, UAE
	Co-production: components for general-purpose bombs	Israel, Saudi Arabia, UAE
	Co-production: air/missile defense interceptor components	Israel, Saudi Arabia
	Co-development of new systems and technologies	Israel, Saudi Arabia, UAE

II. Strategic Context

America's global security challenges are more complex and volatile than at any point since World War II. We confront an evolving landscape defined by rapid strategic and technological changes, significant geopolitical disruption, and the deepening alignment of our adversaries China, Russia, Iran, North Korea, and potentially others. In this environment, the United States and our allies are challenged to effectively deter conflict, and to respond if deterrence fails. One specific challenge we must address is the lack of capacity in our collective industrial base. The United States and its allies are taking initial steps here, and much more can be done with our Middle East partners to strengthen their self-defense, the aggregate industrial capacities of the United States and its global partners, and America's defense producers.

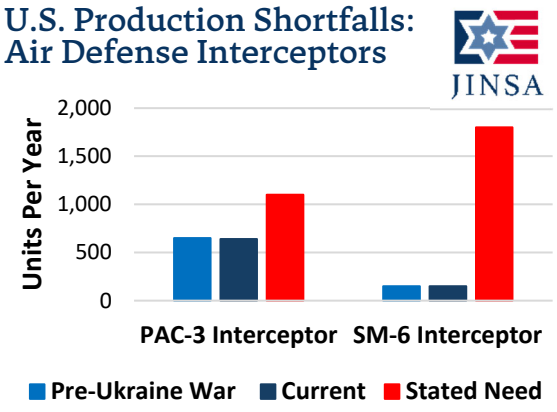
A robust defense industrial base (DIB) has always been a key component of America's alliances and their ability to counter shared threats, dating back to World War II and the "arsenal of democracy" that helped the allies prevail. Similarly, Britain's overseas dominions provided critical raw materials and industrial capacity to help sustain its resource-intensive operations in World War I. Canada alone produced nearly one-third of Britain's artillery munitions by the second half of the war, at which point British forces bore the primary burden on the Western Front.[6]

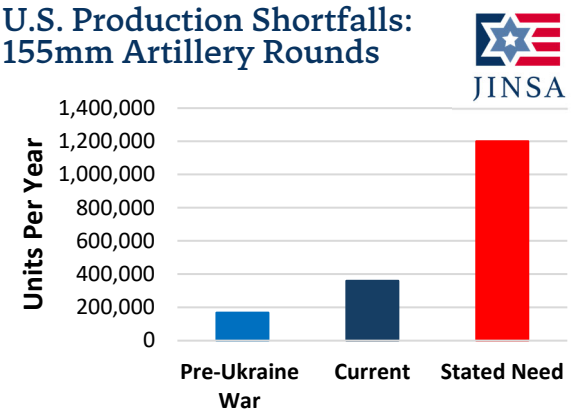
But major reductions in American and allies' defense spending after the Cold War, often called a "peace dividend," led to sizable and sustained contractions in their DIBs. In the wake of the Soviet Union's abrupt collapse, the number of primary U.S. defense contractors quickly fell from 51 to five.[7] From 1985 to the eve of Russia's invasion of Ukraine, Americans employed in defense-related industries likewise contracted by fully two-thirds.[8] Defense production capacity then shrunk, supply chain redundancies and resilience decreased, and sourcing of critical raw materials and other key inputs moved overseas—often to countries that could exploit this dependence for geopolitical leverage.[9] In early 2025, for instance, China retaliated against new U.S. tariffs by swiftly restricting its exports to the United States of key rare earth metals and other critical minerals. America's allies and partners have experienced similar challenges with their own DIBs.[10]

Consequently, our collective industrial base is inadequate to support frontline partners waging protracted wars, let alone ensure our own arsenals are sufficient to deter or prevail in conflict with another major power. Both the 2017 and 2022 U.S. National Security Strategies expressed concern for vulnerabilities in the country's defense-related supply chains and production capacities, particularly the latter in the wake of the COVID-19 pandemic's upheaval to global supply chains.[11]

The eruptions of large-scale prolonged conflict in Ukraine and the Middle East further exposed and intensified this challenge. Ukrainian, Israeli, and American forces have consumed significant quantities of air-to-ground munitions, explosives, artillery shells, air defense interceptors, cruise missiles, and other precious materiel already in high demand from U.S. and allied militaries in Europe and the Indo-Pacific. Reflecting on these challenges at NATO's July 2024 summit in Washington, the alliance's secretary general warned that its members' arsenals "have been too small, the production capacity has been delinquent, and [there are] serious gaps in our interoperability. There is no way to provide a strong defense without a strong defense industry."[12]

In response, the United States and its allies in Europe and the Indo-Pacific are taking initial steps to reinvigorate production, coordinate combined output more strategically, and revise procurement policies to make their forces more interoperable. Referencing transatlantic efforts to address the post-Cold War bottlenecks in defense-related supply chains and production lines, NATO's chief military officer declared last year that "we are moving from a just-in-time, just-enough economy model to a peak demand model."[13] The Pentagon has worked to increase 155mm artillery shell output six-fold as Ukrainian forces consumed years' worth of production in just weeks during the war's initial phases, and NATO's European members made corresponding pushes of their own.[14]





But American and allied planners still confront major shortfalls. Improvised stopgaps reflect the scale of this ongoing challenge, for instance the United States sending 155mm artillery shells to Ukraine from U.S.-owned depots in Israel in early 2023, then subsequently redirecting other 155mm shells originally destined for Ukraine to meet Israel's unexpectedly urgent needs after October 7, 2023.[15] Earlier this year, the United States agreed to refurbish and transfer to Ukraine approximately 90 Patriot air defense interceptors and radars after they were retired by Israel.[16] Simultaneously, European officials estimated they still need 5-10 years to replace U.S.-provided air and missile defenses, artillery systems, satellites, and aerial refueling tankers with domestically-produced alternatives.[17] This outlook is systemic, encompassing shortages in supply chains, production capacity, and stockpiles for everything from rare earth minerals, other strategic and critical materials, propellants, and explosives to artillery munitions, solid rocket motors, and air defense.[18]

Accordingly, recent war games indicate U.S. munitions stocks will last mere weeks in a great power war, and will take years to replenish.[19] In parallel, American policymakers and strategists speak explicitly of how DIB vulnerabilities undermine "deterrence by endurance," inviting aggression by adversaries who have good reason to doubt our ability to sustain drawn-out wars of attrition. Most succinctly, the 2024 National Defense Strategy Commission warned that "failure to restore the former might of U.S. defense production capability and capacity … would gravely erode the credibility of U.S. deterrence, undermine U.S. support to allies and partners in a crisis or conflict, and leave the Joint Force ill-prepared and ill-equipped to fight and win a conflict."[20]

III. New Strategy for Partnerships, Presence & Production

To begin grappling with these problems, American leaders naturally look to shore up ties with longstanding formal allies in industrialized areas of Europe and the Indo-Pacific. Cooperation among the United States and our Middle East partners has yet to match this level of effort, even as America's commitment of significant resources and attention to the Middle East reflects our enduring interests there. Amid Europe's largest land war since 1945, these commitments also show how our regional interests and partnerships increasingly intertwine with those more globally. More and more, our adversaries provide one another the tools to launch and sustain offensives in several theaters at once, pulling the United States in competing directions and undermining our already limited capacity to wage prolonged resource-intensive conflicts with our own forces, supply multiple frontline partners, and deter further aggression simultaneously.

As a superpower with global responsibilities, the United States innately confronts the difficult prioritizations and tradeoffs of defending these widespread interests all at once. With those strains now growing to levels not seen since World War II, however, America needs partners to help soften these tradeoffs by better defending themselves, interoperating with our other partners, and supporting a larger-scale—and more resilient and redundant—U.S.-led global DIB with far fewer vulnerabilities and bottlenecks. In this way, the United States can more adeptly manage the growing, and increasingly overlapping, risks to its interests worldwide. By the same token, more capable partners can strengthen shared deterrence while enabling more sustainable U.S. force presences across Europe, the Indo-Pacific, the Middle East, and elsewhere.

Fortunately, there is very real, but mostly untapped, potential for mutually-beneficial cooperation here. By building more comprehensive and strategic partnerships, the United States and its ready and able friends in the Middle East can make their forces and defense industries much more capable, resilient, integrated, and interoperable.

A. What's Regional is Global

America's enduring and vital national security interests in the Middle East increasingly interweave with challenges to U.S. interests more globally. In their official national security strategies (NSS), Democrat and Republican administrations alike have asserted the need to maintain freedom of navigation in Middle Eastern waters, ensure global access to the region's energy output, combat extremism and terrorism, and uphold security commitments to Israel and other partners.

Iran and its proxies directly jeopardize these interests, holding at risk maritime chokepoints, U.S. bases, and critical infrastructure across the region with missile, drone, cyber, and other attacks. The Tehran regime is perilously close to changing the regional equation altogether by achieving nuclear weapons capability should it try to do so. At the same time, there remains real potential for violent extremism and mass migration in and from the Middle East.

Continuity of U.S. National Security Interests in the Middle East				JINSA
U.S. National Security Interest	2010 NSS (Obama)	2015 NSS (Obama)	2017 NSS (Trump)	2022 NSS (Biden)
Energy Security	X	X		X
Counterterrorism	X	X	X	X
Partner Security	X	X	X	X
Counter-Iran	X	X	X	X

Securing these regional interests is inseparable from America's global great power competition, including its ability to deter and fight conflicts beyond the Middle East. Iran's capacity and willingness to endanger the regional order is abetted by China, Russia, and North Korea, each of whom wants to divert U.S. attention and assets back into the Middle East and away from its own doorstep. By the same token, stoking conflicts that unleash violent extremism and waves of refugees threatens to undermine America's partners in the Middle East, Europe, and elsewhere. Beijing and Moscow also try to weaken U.S. commitments to the region, and U.S. credibility and leadership writ large, by posing as more reliable and effective alternatives to America's longstanding diplomatic, economic, and security partnerships with countries like Saudi Arabia, the United Arab Emirates (UAE), Jordan, Kuwait, Egypt—and in certain ways even Israel.

On a grand scale, members of this axis are creating their own DIB cooperative, a veritable "arsenal of adversaries," to aid one another's aggression across far-flung theaters, including the Middle East, by plugging gaps in their partners' warfighting capacities. China helps Iran make ballistic missile components, including after Israeli airstrikes eliminated key Iranian production capabilities in late 2024.[21] Iranian, Chinese, and North Korean weapons, components, Western-sanctioned dual-use items, and related materiel—and now thousands of North Korean troops—help sustain Russia's war on Ukraine, in exchange for Moscow agreeing to send missiles and interceptors to Pyongyang and, potentially, assist Iran's nuclear weapons program and provide advanced air defenses to protect it.[22] Iran also is reportedly building production lines for attack drones in Venezuela.[23]

These countries now conduct much more frequent combined military exercises, and glean valuable lessons from using each other's battlefields as laboratories. For instance, North Korea is markedly improving the accuracy of its theater ballistic missiles, thanks to their use by Russia against Ukraine, and Russia reportedly is upgrading Iran's electronic warfare (EW) capabilities based on lessons learned from combat in Ukraine.[24] Altogether, these partnerships work to keep the United States and its allies off-balance strategically, and their DIBs behind the curve, by overmatching their capacities to deter and fight multiple conflicts across several theaters at once. As the U.S. intelligence community's public annual threat assessment stated succinctly in March:

> Cooperation among China, Russia, Iran, and North Korea has been growing more rapidly in recent years…. These primarily bilateral relationships, largely in security and defense fields, have strengthened their individual and collective capabilities to threaten and harm the United States, as well as improved their resilience against U.S. and Western efforts to constrain or deter their activities […] This alignment increases the chances of U.S. tensions or conflict with any one of these adversaries drawing in another.[25]

Defense-Industrial and Military Cooperation Among America's Adversaries		JINSA
Partners	**Date**	**Description**
Iran ↔ Russia	Aug. 2022	Iran provides Russia with combat drones, artillery, ammunition, advisory support, and glide bombs in exchange for trainer aircraft and material aid.
Russia → Iran	Aug. 2022	Russia begins launching Iranian reconnaissance satellites, making parts for Iranian satellites, and giving technical aid for Iran's space launch vehicles.
Russia → Iran	Nov. 2022	Russia starts providing Iran with U.S.-made weapons captured in Ukraine.
Iran → Russia	Jun. 2023	Iran begins building a manufacturing plant in Russia for combat drones.
Russia ↔ China ↔ Iran	Jul. 2023	Iran officially joins Russian-/Chinese-led Shanghai Cooperation Organization.
North Korea → Iran	Sep. 2023	DPRK begins sending artillery, shells, missiles, and other weapons to Russia.
Russia ↔ China ↔ Iran	Jan. 2024	Iran officially joins Brazil-Russia-India-China-South Africa BRICS group.
Russia ↔ China ↔ Iran	Mar. 2024	Trilateral naval exercises in the Gulf of Oman.
Russia ↔ North Korea	Jun. 2024	Russia and DPRK sign mutual defense assistance pact.
Russia → North Korea	Jun. 2024	Russian advisory support for DPRK satellite, missile, and space programs.
Iran → Russia	Sep. 2024	Iran agrees to supply Russia with short-range ballistic missiles.
North Korea → Russia	Oct. 2024	DPRK sends est. 11,000 troops to Russia for combat operations in Ukraine.
Russia → North Korea	Nov. 2024	Russia provides air defense and electronic warfare systems to DPRK.
Iran ↔ Russia	Jan. 2025	Iran and Russia sign 20-year strategic and defense partnership.
Russia → Iran	Jan. 2025	Iran reportedly purchases Russian Su-35 combat aircraft.
Russia → North Korea	Feb. 2025	Russian aid for DPRK raw materials sector and production of military drones.
China → Iran	Feb. 2025	Chinese supplies of chemicals for Iranian ballistic missile production.
North Korea → Russia	Mar. 2025	DPRK sends 3,000 reinforcements to Russia for combat operations in Ukraine.
Iran → Russia	May 2025	Iran prepares delivery of short-range ballistic missile launchers to Russia.

B. Partnerships for the 21st Century

This environment of increasingly hostile, capable, and cooperative adversaries requires the United States to recalibrate its worldwide alliance and partnership networks. From their Cold War-era beginnings, these relied on America's capable and resilient DIB, robust global force posture, and credible commitments to partners' security to prevent major conflict in Europe, East Asia, and the Middle East. With U.S. defense spending reaching all-time highs as a percentage of GDP in this period, and with the Soviet Union and China mostly at odds with one another, the United States and its partners understood, at least implicitly, that the burdens of collective defense and deterrence could fall primarily on American shoulders, with allies generally playing supporting roles.

This traditional partnership model is becoming outdated. Combined with the long shadow of the post-Cold War peace dividend, an adversarial axis that now spans the heart of Eurasia can cohesively challenge U.S. interests in multiple places at once. Consequently, America needs its allies and partners to do more when it comes to building up their own forces, bolstering their capacity to support the heavy demands of protracted and intensive conflicts, and cooperating more effectively among themselves to compensate for overstretched U.S. resources and attention. In exchange, our allies and partners continue to seek credible and reliable commitments from us—both in helping them become more active, productive, and interoperable on common defense, and ensuring they will not be left at the mercy of shared adversaries for assuming these costs and risks.

Even more so than in the Cold War, the effectiveness of America's partnerships are interdependent as well. Previously, this was important insofar as the Soviets would be less likely to challenge us in Europe if we reliably upheld our pledges to allies elsewhere, and vice versa. To be sure, this logic still obtains. But now we also need allies and partners to better defend and supply themselves, as well as one another, in order to supplement overburdened American resources and boots on the ground. Fittingly, the official Pentagon primer for international defense cooperation emphasizes that more holistic relationships with friendly countries can increase shared military effectiveness and standardization, reduce acquisition costs by achieving economies of scale and avoiding duplication of effort, and ultimately strengthen America's diplomatic and security partnerships.[26]

America's core Middle East relationships have not fully begun to address this shift. The region's absence of mutual defense pacts with the United States, enshrined in formal treaty guarantees, in some ways limits the efficacy of U.S.-led regional defense compared to, for instance, NATO's impact across the transatlantic space. America's Middle East partnerships largely have been built up through tactical and operational capacity-building missions like military advisory and training roles, intelligence-sharing, and combined counterterrorism and counterinsurgency operations. While logical and necessary, this emphasis means these partnerships have yet to focus as much on strategic efforts to make U.S. and Middle Eastern forces and defense industries more capable, resilient, integrated, and interoperable.

C. Getting Back to Basics

America and its closest allies in NATO and the Indo-Pacific are reinvigorating defense cooperation in response to Russia's invasion of Ukraine and the need to deter and respond to risks elsewhere. The Middle East can similarly become pivotal, rather than something to pivot away from, in the evolving context of our increasingly shared and global challenges. There is appetite and room to make our regional partners more sufficient in defending themselves, and U.S. interests, by making our DIBs more capable, resilient, integrated, and interoperable. Among other things, clear U.S. direction and commitment can create mutually-beneficial outcomes by tapping into the profound largesse and ambitions of our Gulf partners and Israel's vibrant, cutting-edge high-tech sector.

These steps will be vital for effective deterrence in the Middle East, as competing demands limit and complicate America's ability to maintain military presence in the region to match Iran-led threats. In lieu of such presence, this new approach can help replace boots on the ground as the primary currency of U.S. assurance in the Middle East, thereby enabling the United States to project power and influence more effectively and sustainably. By bolstering America's appeal and impact as a security partner, this new approach also can reinforce shared deterrence in the global contest against China, Russia, Iran, North Korea, and others.

To realize these opportunities, the United States and its partners must expand their security relationships beyond a longstanding focus on tactical and operational capacity-building, toward a more comprehensive and strategic-level approach. More systematic defense cooperation, built around joint ventures to co-produce much-needed weapons, components, and related materiel, could mitigate the political, strategic, and financial risks, on all sides, that have impacted key relationships between the United States and its Middle East friends. The long-term investments involved in such projects, their

payoffs for regional security and other U.S. interests, and their concrete signals of mutual commitment can encourage more durable and predictable partnerships in defense industry and beyond.

In light of inadequate and unreliable supply chains that became painfully evident since COVID-19 and protracted wars in Ukraine and the Middle East, co-production with regional partners could prove crucial in developing surge capacity to keep up with swelling demand from the Pentagon, and from U.S. partner forces, for even the most basic military equipment and materials. Beyond support for current U.S. and allied needs, co-development with Middle East partners could help deter future conflicts, and help replenish U.S. and partner forces during conflict, by building up critical stockpiles in advance.[27]

Co-production of vital munitions, components, and equipment also could distribute the weight of upholding Middle East stability more evenly. This would free up American resources and bandwidth to address competing challenges without leaving behind dangerous vacuums for Iran, Russia, China, and terrorist groups. Making the arsenals of the United States and its partners more resilient and redundant also could alleviate the political, logistical, and operational headaches attending America's periodic emergency resupplies to the region, most notably for both the United States and Israel in the 1973 Arab-Israeli War and after October 7, 2023.

More strategic and comprehensive partnerships could enhance interoperability of American and local partner forces as well. This is particularly important in the context of increasingly overlapping threats from Iranian-made drones, cruise missiles, and ballistic missiles, as well as the tightening regionwide coordination, under CENTCOM's auspices, on strategic planning, operations, and other critical military activities to counter these threats.[28]

Altogether, progress on these fronts would build on defense initiatives with regional partners that were identified during President Trump's Middle East trip in May 2025, complementing America's larger ambitions there and more globally. Stronger and more capable partnerships would reinforce the unique value of U.S. leadership and guarantees—an irreplaceable currency for securing Israel-Saudi normalization and genuinely integrating regionwide defenses against Iran-led aerial, maritime, cyber, and other shared challenges. In turn, more sustained and productive cooperation among the United States and its Middle East partners could counter persistent Chinese and Russian efforts to develop inroads there at our expense, plunge the region further into instability that distracts from other contingencies, and erode the credibility of U.S. commitments to its allies around the world.

IV. Unfolding Opportunities

A. Building Toward New Partnerships

Many of the legal and bureaucratic considerations that have encouraged risk-aversion from the United States, its allies and partners, and U.S. defense companies in their security relationships are softening in light of rapid strategic and technological changes, the increasing alignment among our adversaries, and the aggregate inadequacies of our collective defense industrial capacity.

Amid these historic events, the Pentagon and U.S. defense companies look more concertedly to foreign partners to help meet mounting demand for basic supplies and munitions. This is far from unprecedented. Key U.S. weapons systems like AIM-9 Sidewinder air-to-air missiles, Stinger air-to-ground missiles, HAWK surface-to-air missiles, and F-16 fighter aircraft have been co-produced with various partner nations for decades, with such arrangements often resulting in technological improvements and per-unit cost reductions. Originally Israeli-developed and U.S.-funded, the Iron Dome air and missile defense system now has the majority of its components produced in the United States.[29]

Responding to widespread disruptions to U.S. supply chains during the global pandemic, and the ensuing revelations about vulnerabilities to Chinese control over essential goods and materials, White House executive orders in 2020-21 directed the Secretary of Defense to identify risks to America's DIB stemming from dependence on competitor nations for critical minerals and other strategic materials. Since then, the Defense Department has sought to make supply chains more resilient and reliable by de-coupling them from China, in favor of security of supply arrangements (SOSA) in which the United States and its allies help plug resulting gaps in one another's supply chains.[30]

As part of a larger effort to reverse the offshoring of critical manufacturing and other activities to competitors like China, the Pentagon is easing regulations for co-production and technology-sharing with defense companies in allied countries.[31] This "friendshoring" reflects the urgency to invest in spare capacity and amass reserve stocks, at home and abroad. As Bill LaPlante, the Undersecretary of Defense for Acquisition and Sustainment, put it in summer 2023, "where we're headed is co-development, co-production, and co-sustainment with our partners."[32]

In late 2023, the Defense Department issued a comprehensive *National Defense Industrial Strategy* acknowledging "the global activity of pacing threats increasingly requires a global approach to defense industrial relationships." This approach entails "developing, growing, and sustaining multiple redundant production lines across the consortium of like-minded nations … to ensure adequate production capability and capacity." Noted areas for improvement include greater and more proactive investment in excess production capacity, licensing production of U.S. systems by allies and partners, and ensuring greater integration between U.S. and partner forces.[33]

In just the past few years, the United States and its allies have signed a variety of friendshoring agreements. In late 2024, Japan and Australia announced their intent to co-develop and co-produce new frigates, the first such agreement in Japan's naval history.[34] Perhaps equally unprecedented, and around the same time, NATO countries started implementing the so-called "Danish model" of financing Kyiv's government contracts to produce artillery rounds, missiles, drones, and other systems that can be manufactured cheaply, rapidly, and at scale. In this way, NATO countries can boost output for Ukraine's

needs, make Ukrainian forces more interoperable with their own, and reduce strains on their own stockpiles by investing directly in Ukraine's defense-industrial base.[35] Recent U.S. legislation seeks to expand the shrinking U.S. Navy and Coast Guard fleets by enabling certain vessels and their components to be built in shipyards of America's NATO and Indo-Pacific allies.[36] President-elect Donald Trump suggested outsourcing production of U.S. naval vessels to partner countries, at least as an interim measure while trying to revive America's shipbuilding industry.[37]

Friendshoring: Announced Co-Production and Technology-Sharing Agreements JINSA			
Manufacturer	**Product**	**Production Site**	**Announcement Date**
Germany	155mm artillery shells	Australia	May 2023
United States	Fighter jet engines	India	June 2023
United States/ France	Guided Multiple Launch Rocket System (MLRS)	Australia	July 2023
United States	Javelin anti-tank guided missiles	Poland	September 2023
United States	Homar-A MLRS ammunition	Poland	September 2023
United States	155mm artillery shell materials/components	Canada/India/ Poland	October 2023
Germany	155mm artillery shells	Ukraine	February 2024
United States	THAAD missile defense system components	Saudi Arabia	February 2024
France/Germany	Various spare parts and ammunition	Ukraine	March 2024
United States	F-35 stealth aircraft engines	Finland	March 2024
United States	Patriot GEM-T components	Spain	April 2024
Germany	155mm artillery shells	Lithuania	June 2024
France	*Belharra*-class frigate hulls and superstructures	Greece	July 2024
United States	Medium-caliber ammunition	Ukraine	July 2024
United States	AIM-120 AMRAAM air-to-air missiles	Japan	August 2024
United States	PAC-3 air defense missiles	Japan	August 2024
Norway	155mm artillery shells	Ukraine	August 2024
Norway	Joint Strike Missile (JSM)	Australia	August 2024
Norway	Naval Strike Missile (NSM)	Australia	August 2024
United States	Precision Guided Strike Missile (PrSM)	Australia	August 2024
United States	Medium-caliber ammunition	Lithuania	September 2024
United Kingdom	RIM-162 Evolved SeaSparrow Missile Block 2	Australia	September 2024
Norway	JSM	United States	September 2024
Norway	NSM	United States	September 2024
Germany	120mm/155mm howitzer barrels	United Kingdom	October 2024
Czechia	155mm artillery shells	Ukraine	October 2024
Germany/Italy	Infantry fighting vehicles/main battle tanks	Germany/Italy	October 2024
United States	Stryker armored fighting vehicles	India	January 2025
United States	Maritime patrol aircraft sonobuoys	India	January 2025
Türkiye	TB-2/-3 unmanned combat aerial vehicles	Ukraine	February 2025
Türkiye	155mm artillery shells	Germany	February 2025
United States/Israel	Solid rocket motors	United States	February 2025
Norway	120mm/155mm artillery shells	Denmark	March 2025
United States	155mm artillery shells	Australia	March 2025
United States	F-35 stealth aircraft fuselages	Germany	March 2025
Türkiye	155mm TNT propellant	United States	March 2025
South Korea	Homar-K MLRS ammunition	Poland	April 2025
Israel	Bullseye standoff precision-guided missiles	United States	April 2025

In parallel, Congress and the Pentagon are taking initial steps to enact multiyear procurement authorities, in order to incentivize U.S. defense manufacturers to boost key munitions production.

The FY23 National Defense Authorization Act authorized such contracts for everything from Patriot air defense interceptors and long-range missiles to artillery rocket systems and 155mm artillery rounds, and the Defense Department's 2024 budget request included multiyear procurement of basic munitions.[38] In 2023, the Pentagon awarded contracts in quick succession to nine companies, including three outside the United States, to ramp up production of 155mm shells.[39]

The United States also has conducted high-level "production diplomacy" with its European and other allies to make their DIBs more productive, cohesive, and resilient. The Ukraine Defense Contact Group (UDCG)—consisting of NATO members, most of America's formal allies in the Indo-Pacific, and a handful of its non-treaty partners—convened regularly to coordinate collective defense output and procurement. These meetings have gone some way to overcome or mitigate production bottlenecks and supply chain vulnerabilities, improve standardization of weapons and equipment delivered to Ukraine, and reduce direct burdens on America's armories and production capacity.[40] At its 2024 Washington summit, NATO committed to "accelerate the growth of defense industrial capacity and production across the alliance" by increasing investment in members' defense sectors, organizing multinational procurement, and intensifying efforts to make NATO member forces more interoperable.[41] In addition, the United States has pressed its Australian, Japanese, and Korean allies to cover NATO supply shortfalls for Ukraine.[42]

To be durable, any potential Ukraine-Russia armistice will require continued U.S. and European production diplomacy to support Ukraine deterrence by endurance, including enabling Kyiv's forces to field more of everything from basic artillery ammunition to air and missile defense interceptors. In a similar vein, addressing Israel's persistent material shortfalls through more reliable munitions deliveries will be a prerequisite to prevent Iran and its proxies from reconstituting their forces and endangering U.S.-backed ceasefires and diplomacy across the Middle East.

B. Untapped Middle East Potential

These are all significant steps toward making U.S. and allied DIBs more productive, coordinated, and resilient. In light of the sheer scale and urgency of the problem, for both current and possible future conflicts, there is much more that can be done to harness Middle East partnerships and maximize their potential contributions to collective defense industrial capacity.

The United States has no formal allies in the region, and their DIBs are generally less developed than those of NATO countries or America's Indo-Pacific treaty allies. But this is counterbalanced by the pressing global demand for fairly basic, attritable, and uncontroversial munitions and materials that are Defense Department programs of record with fairly few export controls, relatively short lead times for production, and relatively easy ability to scale up and build more resilient supply sources. This includes everything from shells, fuses, and propellant charges for 155mm artillery rounds to strategic materials, unmanned aerial systems, and even certain air defense interceptors. Shared U.S. and Middle Eastern adversaries Iran and China are reportedly undertaking their own efforts on this front, as Beijing supplies raw materials for Tehran to produce propellant for ballistic missiles.[43]

Particularly after October 7, our Middle East partners appreciate the need to reduce reliance on case-by-case arms sales in favor of building up their own capacities. Fortunately, these countries possess ample

capital, relatively young, well-educated, and affluent labor pools, and in many cases natural resources to start filling these voids. In line with its ambitious "Vision 2030" program to diversify economically away from fossil fuel exports, Saudi Arabia aims explicitly to devote fully half of its sizable defense budget—a total nearing $80 billion for 2025—to domestic production, and it is courting foreign defense firms to set up regional headquarters in the kingdom. Last year, it signed an agreement to become the first international customer to produce components of the U.S.-made Terminal High Altitude Area Defense (THAAD) anti-ballistic missile system. It also sealed a joint venture to assemble, and eventually produce, Singaporean counter-drone systems domestically.[44] Riyadh previously inked a joint venture to construct French warships in the kingdom, and it is now exploring options to finance British-Italian-Japanese co-development of a next-generation fighter jet.[45]

In 2025, Saudi Arabia announced plans to build more resilient global supply chains for critical minerals, and implicitly cut China's global predominance, by becoming a world leader in mining and processing lithium, bauxite, and rare earth elements.[46] This is all the more opportune given that many U.S. defense producers currently have fairly limited stockpiles of such materials.[47]

Similarly, in the past few years UAE-based defense companies have bought stakes in, and signed joint ventures with, multiple Israeli counterparts to co-develop counter-drone systems.[48] The Emirates also are pouring unprecedented investments into building artificial intelligence (AI) chip-manufacturing plants domestically, as part of a broader effort to become a global leader in such cutting-edge technologies—and often doing so in conscious coordination with the United States instead of China.[49] Like Saudi Arabia, the UAE has begun ramping up efforts to help diversify global supply chains for critical minerals and other strategic materials.[50] This is exceedingly relevant for the United States and its allies. Even with decoupling campaigns underway, they remain profoundly dependent on external sources for more than a dozen minerals deemed "critical" to national security, while Beijing's control of 95 percent of the world's rare earth metals gives it real leverage.[51]

Israel's relatively small, but agile and technologically-advanced, defense industry has worked with American counterparts for years on joint research, development, and production of some of the world's most sophisticated systems like Iron Dome, David's Sling, and Arrow air and missile defenses. The Israeli government also recently signed deals with domestic firms to produce more of its own air-to-ground munitions, as well as raw materials for defense articles.[52]

Using recent history to look forward, the transformational Abraham Accords and the Pentagon's reassignment of Israel to U.S. Central Command's (CENTCOM) area of responsibility underscore how U.S. leadership and initiative can grow regional collaboration to previously-unimagined extents—even in the face and fallout of catastrophes like October 7, 2023, intended to discourage such cooperation and drive deep wedges between Israel and its budding Arab partners. These same developments fortuitously reduce concerns, from Israel and Arab partners alike, regarding the potential impact of U.S. regional defense cooperation on Israel's qualitative military edge (QME).

Perhaps most impressively, the U.S. military has successfully coordinated large-scale efforts by Israel and multiple Arab partners to track and intercept hundreds of Iranian missiles and drones fired at Israel.[53] The underlying possibilities for even greater coordination are evident in the continued push for Israel-Saudi normalization and more formal U.S.-Saudi defense ties, reportedly including provisions to strengthen the kingdom as an asset in the larger great power competition with China and Russia.[54]

V. Recommendations

The United States and its friends in the Middle East should begin reframing and expanding their partnerships in earnest. Efforts to date have yet to match ambitious U.S. defense industrial initiatives with European and Indo-Pacific allies, giving the Trump administration a valuable and timely opportunity to make a lasting mark here. These recommendations are consistent with the priorities and initiatives spelled out during the president's May 2025 trip to the Middle East, and they can help shape an onward program of work to enhance capacity among our regional partners.

More strategic and capable Middle East partnerships can contribute directly to more resilient and productive DIBs that meet our needs and those of our hard-fighting partners around the world. Equally important, this will benefit U.S. industry and economic productivity, bolster U.S. leadership on Israel-Saudi normalization and other key Middle East opportunities, and ultimately make America's regional presence more sustainable.

Capitalizing on the high ceiling for mutually-beneficial growth, and doing so with an urgency to match the pressing challenges from our shared adversaries, entails some modesty and realism to actually take the most important first steps and start overcoming existing hurdles all around. The United States and its regional partners should adopt a "crawl, walk, run" approach to strategic capacity-building that starts with relatively simple but crucial efforts to initiate joint procurement and co-production, focusing on materials, components, and munitions with minimal existing U.S. bureaucratic and legal obstacles. As these initial endeavors accumulate tangible benefits for all parties involved, they can serve as momentum toward more ambitious and rigorous programs to build 21st-century partnerships that enhance capabilities, capacity, resilience, and interoperability.

Much like with the Abraham Accords and Israel's reassignment to CENTCOM, seizing these opportunities requires clear U.S. leadership to incentivize and coordinate greater commitments and efforts from regional partners. As part of a larger deal to secure Israel-Saudi normalization, a potential U.S.-Saudi mutual defense treaty could enable significantly more rigorous bilateral defense industrial cooperation, similar to existing U.S. efforts with European and Indo-Pacific allies.

Achieving these outcomes also requires serious thinking and tough decision-making from the Defense Department, Congress, U.S. defense industry, and their counterparts overseas, in order to devise pragmatic solutions that remove restrictions on procuring defense articles from abroad and exporting certain technologies and capabilities to partners.[55]

To this end, the Trump administration must streamline and simplify its approach to Foreign Military Sales (FMS), and examine the legal and policy limitations in America's existing export control regime embodied in the International Traffic in Arms Regulations (ITAR). As per U.S. law, the Executive Branch and Congress can and must work together here, coming up with viable options to legislate and sign into law export control reforms. Progress on this front can help change bottom-line incentives for U.S. defense industry to view the Middle East, like it does Europe and the Indo-Pacific, as an opportunity to boost global defense industrial capacity and resilience.

Specifically, "crawling" should start by working with partners on raw materials procurement and production of strategic materials directly relevant to national security, given America's continued overdependence on China in this regard. Our partners like Saudi Arabia, the UAE, and Israel are all taking

serious steps that could help diversify U.S. sources, either by increasing their domestic production capabilities in these fields or developing alternatives to existing global supply chains. Other fairly low-hanging fruit includes co-production of components for high-demand munitions, for instance propellant charges or fuses for NATO-standard 155mm artillery rounds, as well as components for general-purpose bombs.

Depending on initial progress and timeframes, the United States and Middle East partners could then proceed with co-production of fairly straightforward finished products urgently demanded by regional, U.S., and other partner forces—most obviously, 155mm artillery rounds, general-purpose bombs, and potentially other critical needs such as air defense interceptors. Over time, these partnerships could evolve to co-develop new systems and technologies.

A specific approach for the United States and its Middle East partners could look like this:

Crawl, Walk, Run: A Realistic Path to More Capable Middle East Partnerships		JINSA
Low-hanging fruit ↓ **Longer-term projects**	**Critical Opportunity for Cooperation**	**Potential U.S. Partner(s)**
	Raw materials procurement/strategic materials production	Israel, Saudi Arabia, UAE
	Co-production: propellant charges/fuses for 155mm shells	Israel, Saudi Arabia, UAE
	Co-production: components for general-purpose bombs	Israel, Saudi Arabia, UAE
	Co-production: air/missile defense interceptor components	Israel, Saudi Arabia
	Co-development of new systems and technologies	Israel, Saudi Arabia, UAE

America can leverage and reinforce its unique regional leadership role in the process. By pairing Israel's high-technology defense sector and its growing DIB capacity with our Gulf partners' massive capital and demonstrated ambitions to diversify global supply chains that support national security needs, the United States could expedite production of directed energy systems to counter, at sustainable cost, shared asymmetric threats from attritable drones, rockets, and missiles like those used in abundance by Iran's proxy axis and by Russian forces attacking Ukraine.

As the United States and partners move forward on these fronts, including helping support U.S. allies in Europe and Indo-Pacific, the less America will face competing burdens that routinely and abruptly pull its focus away from the Middle East. By the same token, re-envisioning and deepening these partnerships will make it easier to pursue other shared, potentially transformational strategic goals of integrated Middle East air and missile defense, maritime security cooperation, expanding the Abraham Accords, and regional economic integration.

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