

the least restrictive member of the consortium. Thus the *Tornado* fighter could be exported by Britain to Saudi Arabia, although such a sale would likely not have been possible under German export controls (given the fate of various attempts to export *Leopard* tanks to Saudi Arabia). This problem of harmonization affects all multinational export control systems. On the positive side, collaborative projects lessen the pressures to export because of the larger captive market formed by the collaborating partners, reducing the economic sacrifices associated with restraint.

Cooperation with third-tier producers, however, poses greater challenges for controlling proliferation. Third-tier recipient/producers are today more able to insist on economic offsets, access to critical technologies, or joint production and technology transfers that will increase their ability to produce weapons (or components) in the near future. An excellent example of this is provided by the emerging Turkish arms industry, which has developed projects to manufacture an increasingly large number of components of the F-16, as well as armoured vehicles, light aircraft, helicopters, and multiple rocket systems.²³ It is even possible that after the American F-16 production line is shut down in the mid-1990s, Turkey will become a major supplier of parts, components or completed aircraft to existing clients for the F-16. A similar plan is in place for Egyptian production of the American M-1 tank. The implications for proliferation control that this contains are obvious: sophisticated technologies (and the ability to produce them) are more widely diffused, the number of potential suppliers of is increased, and the ability of the source producer to control the end-use of their own weapons platforms is further curtailed.

A Long-Term Transformation?

Despite these dramatic short- and medium-term changes, there is little reason to believe that the underlying factors that drive weapons proliferation and military build-ups have changed fundamentally. Regional conflict management processes are only active in some regions, and are likely to proceed fitfully, if at all. War and conflict in the developing world are not likely to diminish, and the accompanying demand for weapons will not disappear. In addition, if the "long recession" of the early 1990s only artificially suppressed demand, then improved economic conditions will dictate a resurgence (even if limited) in the demand for arms. Since arms procurement is directly tied to military spending, which is in turn linked to overall levels of wealth, the (slow) pace of economic development in the developing world will trigger a gradual process of military modernization and arms

²³ For details on the Turkish programme see Gülay Günlük-Senesen, "An Overview of the Arms Industry Modernization Programme in Turkey," in SIPRI, *1993 Yearbook*, 521-532.