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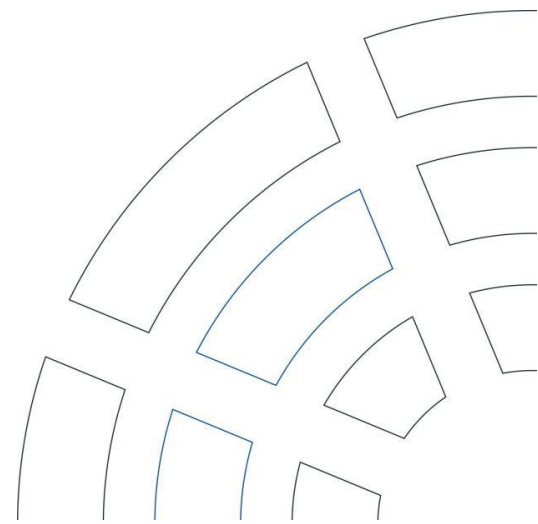
MEDITERRANEAN AND MIDDLE EAST SPECIAL GROUP (GSM)

SHIFTING GEOPOLITICS IN IRAN AND THE GULF

Report
Theo FRANCKEN (Belgium)
Rapporteur

036 GSM 23 E rev.2 fin – Original: English – 30 October 2023

Founded in 1955, the NATO Parliamentary Assembly acts as a consultative interparliamentary organisation which is institutionally separate from NATO. This document was adopted by the Mediterranean and Middle East Special Group during the GSM visit to Ankara and Istanbul, Türkiye in October 2023. It is based on information from publicly available sources or NATO PA meetings – which are all unclassified.



The Gulf Monarchies' energy reserves, prodigious wealth, strategic location between Europe, Asia and Africa and relations with Iran are all factors of the region's persistent geo-strategic relevance to NATO allies. For its part, Tehran's aggressive military posture and nuclear ambitions are drivers of tension in this area of strategic importance, while its direct support for Russia's war against Ukraine and terrorism further underlines the challenge it poses to Euro-Atlantic security. Developments in this important region tend to spill over directly into the broader Middle East. Gulf Cooperation Council (GCC) members exercise influence through formal diplomatic channels but also via sectarian and other networks. The Islamic Republic actively supports militia groups operating in the region and terrorist networks that extend into Europe to pursue its broader ambitions. Russia and China are also increasingly active in the Gulf and engage both with the Gulf monarchies and Iran, in part, to undermine Western influence in the region.

Russia's war of aggression against Ukraine has reshaped Western energy ties with the Gulf. While the continued presence of European and North American military forces in the Gulf provides a degree of reassurance to the region, surprising shifts in the strategic landscape are also afoot, opening new diplomatic opportunities but also challenging Western governments. These include the easing of long-standing tensions between Qatar and other GCC members, the normalisation of relations between Israel and several states in the broader MENA region as expressed in the Abraham Accords and a recent Chinese-facilitated agreement between Iran and Saudi Arabia to re-establish diplomatic ties.

Domestic political changes in Iran are also having an impact. In September 2022, a popular uprising gripped that country and justifiable public anger with the regime and its harsh enforcement of Sharia law has clearly mounted. Economic grievances, a lack of political freedom and perceived government incompetence cascaded into an uprising that galvanised Iranian society and suggests the forces for political freedom in that country deserve Western support and solidarity.

Indeed, the report concludes by suggesting that Allied governments and societies should look for ways to empower democratic voices in Iran and to support the achievement of their aspirations. The Islamic Revolutionary Guard Corps (IRGC) should be listed as a terrorist organisation, unjustly detained foreign nations should be released and a new consensus must be forged on a shared approach to ending the military nuclear programme of the Islamic Republic of Iran. Were the regime to acquire a nuclear weapon, it would threaten regional stability and possibly trigger a proliferation dynamic that would further imperil the region and allied countries. Allies must also deepen their engagement with Gulf partners to defend fundamental strategic interests while advancing important values such as human security and shared prosperity.

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I- INTRODUCTION

1. The notion of strategically disengaging from the Gulf has periodically surfaced in Western policy circles only to be dismissed as an exercise in wishful thinking. The possible reasons for contemplating a strategic reorientation of this magnitude are worth considering even if some might judge these to be insufficiently compelling. For example, calls for a strategic pivot to Asia and away from the Middle East by some in the US strategic community were the product of concerns about a rising and more assertive China and the need to harness resources to exercise effective deterrence in East Asia. In practical terms, so it was argued, this would require shifting military assets and diplomatic attention from regions of less strategic importance to the United States than the Pacific where this burgeoning rivalry with China is most likely to play out. Some felt, moreover, that the old justifications for massive US engagement in the Gulf region had begun to wane, and this view was reinforced by an explosion of US domestic energy production linked to hydraulic fracking which allowed the United States to reduce oil imports (Ryan, 26/1/2023). This energy windfall, in turn, inspired some to begin to discount the strategic centrality of the Gulf region. Moreover, the undemocratic nature of the region's governments along both littorals, the presence of extremist sectarian movements and difficult relations with some of the region's governments raised concerns about entanglement with states that simply do not embrace liberal democratic values.

2. Europe has been relatively more dependent on trade with the region than has the United States and simply because of geographic proximity, it has long been exposed to developments in the region in ways that perhaps its North American Allies were not. That Iranian missiles can reach continental Europe is not inconsequential in this regard. But there are also opportunities in the region for Europe. GCC member states collectively constitute the EU's sixth largest export market and are an important source and destination for European investment. The EU is the second most important trade partner of the GCC after China and accounts for 12.3% of the GCC's total trade. The EU ranks as the GCC's number one import partner and in 2020 was the fourth biggest export partner of the GCC. EU-GCC total trade in goods in 2020 amounted to €97.1 billion (European Commission, Trade: Gulf Region, *n.d.*).

3. In fact, the challenging nature of the region and both the threats and opportunities it generates are precisely why NATO Allies need to deepen their collective engagement. Its proximity to the trans-Atlantic space and its strategic importance deriving from the energy it produces, the wealth it generates and the divisions and conflicts that threaten regional and global stability must be considered. Simply put, not to engage with this important region would compromise Allied security.

4. The Gulf region plays a central role in the global economy. GCC states have registered notable economic growth, and in 2022 Saudi Arabia was the world's fastest-growing large economy (Zakaria, 2023). The region, however, is also rife with threats, not the least of which is an unstable revanchist Iranian regime with hegemonic ambitions and an apparent hunger to develop and perhaps eventually acquire nuclear weapons capabilities. Tensions in the region sometimes quickly break out into outright conflict. The Islamic Republic of Iran and Saudi Arabia, for example, have conducted a proxy war in Yemen with devastating implications for the people of that beleaguered country. That conflict has at times spilled over the borders and raised alarm bells in Allied capitals.

5. Both Iran and the members of the GCC exercise influence throughout the broader Middle East through formal diplomatic channels but also informally through sectarian and other networks and so developments in the region can and do shape broader trends in the region. That Russia and China are increasingly active in the Gulf and are engaging with both the GCC and the regime in Tehran, in part, to undermine Western influence is also consequential, particularly at a moment when Russia is engaged in a major land war on the European continent and has looked both to Tehran and to the

Gulf Monarchies in different ways for support. This development, perhaps more than others in recent memory, points the challenge the region poses to Allied security.

6. The threats emanating from the Gulf are wide ranging, both local and globally consequential in nature, impact Allied countries in different ways and are thus difficult to address in a perfectly coherent fashion. It is not surprising therefore that the approach taken by NATO to the region has typically been cautious, because the countries of the region themselves approach NATO in different ways and with divergent expectations. Defence partnerships with the region have been generally fruitful and, at times, consequential, for example, during the Libyan conflict when Qatar and the United Arab Emirates (UAE) provided air support to NATO's United Protector operation. Qatar also played an outsized role in efforts to evacuate people from Afghanistan after the fall of the Afghan government and the coalition withdrawal from that country. These partnerships are, however, generally limited in scope and ambition.

7. Despite the structural nature of rivalry shaping the geo-strategic landscape of the Gulf, the region's diplomacy is hardly static. Indeed, profound, and surprising changes are afoot, creating both new opportunities and posing unforeseen diplomatic and strategic challenges for Western governments. These include the signing of the Al-Ula agreement in 2021, which helped ease long-standing tensions between Qatar and other GCC members, the normalisation of relations between Israel and several states in the region as expressed in the Abraham Accords, a burgeoning popular revolt against Iran's clerical authorities, who have controlled the Iranian state since 1979, and Russia's war against Ukraine which has had a powerful and worrying impact on global oil and gas markets (Cause, 2022). By providing weapons to Russia, the Iranian government is now supporting Moscow's brutal and illegal war of aggression against Ukraine.

II- THE IRANIAN CHALLENGE

8. The Gulf remains relevant because of its oil and gas reserves, prodigious wealth, strategic location between Europe, Asia and Africa and the need to contain the ambitions of the Government of Iran, which has been overtly hostile to Western interests since the 1979 Revolution. Tehran's offensive military strategy and nuclear ambitions are drivers of instability in the region, while its direct support for Russia's war against Ukraine further underlines the challenge it poses to Euro-Atlantic security. Finally, the clerical regime's ongoing brutal crackdown on its own civil society points not only to that regime's utterly repressive nature but also to its mounting illegitimacy in the eyes of the Iranian people.

9. Russia's war on Ukraine has made it a pariah state, and it has thus become a highly undesirable supplier of energy. Sanctions against Russia and a collective effort on the part of Allies to dramatically reduce or eliminate Russian energy imports have elevated the importance of the Gulf region as an alternative supplier of both oil and gas. The Iranian leadership continues to see the United States and Israel as its greatest enemies and seeks to counter both through its deepening partnership with Russia, nuclear and missile programs, and support for Hezbollah in Lebanon and Hamas in Gaza. The Iranian regime's backing of the Houthis in Yemen and for other non-state actors elsewhere, including elements of the region's Shia communities seeking to challenge the authority of the Gulf monarchies, constitutes another destabilising factor in the region. To varying degrees, the Gulf monarchies see the Iranian regime as constituting a security challenge. For Bahrain this threat is often characterised as existential while Qatar and the UAE have conducted relatively normal diplomatic relations with Tehran. The Saudis are now tentatively and cautiously engaging Iran although their concerns about its ambitions are apparent. For its part, Israel considers Tehran's military capabilities, its aggressive policies throughout the Middle East including its military support

for Hamas and Hezbollah, its nuclear ambitions, and its avowed rejection of Israel's right to exist as the greatest existential threat it confronts.

10. NATO Allies continue to have enduring interests in the stability of the Gulf region and see the Iranian regime as directly threatening those interests. This does not necessarily mean that the Allies have a common approach to this complicated region, something that became apparent when the United States withdrew from the Iran nuclear deal – the Joint Comprehensive Plan of Action (JCPOA) – to the great concern of many European governments. But the Government of Iran's nuclear ambitions, its military support for Russia, alliances with extremist groups throughout the region and increasingly brutal crackdown on its own people have subsequently clarified the threat to European and North American Allies alike while fostering renewed agreement on the nature of the challenge, if not always on the best policy responses.

11. The decision by the Trump Administration to withdraw the United States from the JCPOA and to designate the Islamic Revolutionary Guard Corps (IRGC) as a “foreign terrorist organisation” placed the nuclear agreement with Iran in jeopardy (Harb, 13/5/2022). Although initially interested in exploring the possibility for reviving its own participation in the JCPOA, the Biden Administration has now essentially suspended these efforts. European Allies and European Union (EU) member states have also been compelled to revisit their expectations for relations with Tehran. In light of the Iranian regime's heavy-handed response to civilian protests and its support for Russia's illegal and unjustified war in Ukraine, (European Parliament,2023) recently passed a resolution strongly condemning Tehran's behaviour and calling for “further adjustments in the EU's position towards Iran”. It also called on the EU to sanction Iran's senior leadership while designating the regime's paramilitary Basij and the Quds Force as “terrorist” organisations. It is worth noting, however, that in that same week, the European Parliament also passed a motion in favour of the full implementation of the JCPOA. Indeed, many in Europe continue to see the JCPOA,, or some form of it, as offering the most realistic means of containing the GOI's Government of Iran's nuclear ambitions, even if the conditions for restarting those talks are currently not at all propitious (Motamedi, 21/1/2022).

A. IRAN'S PARTICIPATION IN RUSSIA'S WAR ON UKRAINE

12. Tehran's direct support to of Russia in its war on Ukraine has further altered European views of the regime, the threat it poses to European security and the policies needed to contain it. The Government of Iran's decision to supply Russia with Shahed-136 loitering munitions, i.e. kamikaze drones, used to terrorise Ukrainian cities and destroy vital civilian and critical infrastructure, has made the Iranian threat to European peace and comity both visceral and consequential. In addition, the Government of Iran has deployed military teams to Crimea to support Russian deployment of these weapons. Tehran's direct participation in Russian-propagated terror attacks on European territory has prompted serious rethinking in Europe about the potential benefits of engaging with the Iranian regime (Gramer, 5/1/2023).

13. A common disdain for the West and the international rules-based order, as well as their shared pariah status, has brought the Iranian and Russian regimes closer together. According to William J. Burns, Director of the US Central Intelligence Agency (CIA), “a full-fledged defence partnership between Russia and Iran” is emerging, “with the Iranians supplying drones to the Russians, which are killing Ukrainian civilians as we speak today, and the Russians beginning to look at ways in which, technologically or technically, they can support the Iranians” (Pollak, 2022). This trade is of direct concern to NATO and has been further highlighted by the establishment of a new Russo-Iranian drone factory in the Russian republic of Tatarstan. The factory is at the centre of Moscow's growing partnership with Tehran and has already produced reconnaissance drones deployed in Eastern Ukraine for Russia's Ministry of Defence (Cook et al., 2023). At a meeting of Allied foreign ministers in Bucharest NATO Secretary-General Jens Stoltenberg warned, “We are saying very clearly that no country should support Russia's illegal war, and therefore, Iran and no

other country should provide Russia with missiles, drones or anything else that can help them to continue this brutal war of aggression against Ukraine” (Harkov, 29/1/2022).

14. Many in the Gulf are concerned that growing Russian-Iranian ties could augment Tehran’s military capabilities, threatening the already tenuous balance of power in the Gulf and the Middle East more generally. US officials have suggested, for example, that this burgeoning Russian-Iranian defence partnership could eventually bring game-changing Russian-made SU-35 fighter jets or its S-400 advanced air defence system to the region (Gramer, 2023). Russia’s mounting cooperation with the Government of Iran thus poses a challenge both to the European and the Middle East security order and has become a source of mounting concern for Allied and Gulf governments alike.

15. So far, Russia has refrained from purchasing ballistic missiles from Tehran as it worries that this could lead Ukraine’s western partners to provide it with similar munitions. The Kremlin is particularly concerned, for example, that were it deploy Iranian ballistic missiles, the US would then feel justified in providing Kyiv with ATACMS missiles that have a 300 km range and could reach into Russia. Iran’s Fateh-313 and Sulfiqar ballistic missiles have ranges of 500 km and 700 km respectively. US and European officials have warned Tehran of serious consequences if it sells these missiles to Russia. One problem here is that the Iranian leadership is already under powerful sanction and the potential marginal diplomatic benefit of additional sanctions may be somewhat limited even if there are other strategically compelling reasons to impose sanctions. Western leverage there is limited. Tehran now sees Russia as one of the few countries in the world with which it can do business and is effectively extending a lifeline to its sanctioned-battered economy. Concerned about its declining stocks of guided missile and artillery munitions, Russia has seized the opportunity Iran has offered to restock its overstretched military. The Iranian military has the largest fleet of ballistic missiles in the Middle East, and US officials characterise its arsenal as increasingly accurate and sophisticated. An ever more beleaguered Kremlin may feel it has no choice but to tighten its direct military links with Tehran, particularly as China has so far been reluctant to sell it sophisticated weapons for use in Ukraine (Rathbone et al., 6/3/2023).

16. The United States, Britain, France and Germany have argued that the GOI’s sale of drones to Russia for use against Ukraine violates UN Security Council Resolution 2231, the backbone of the JCPOA. These allegations, combined with ongoing diplomatic deadlock over reviving that 2015 nuclear agreement, have led some to suggest pursuing the “snapback” provision that would, in turn, reimpose full UN sanctions on Tehran and essentially terminate the JCPOA. This would further isolate Iran economically and diplomatically, but this increasingly seems not to alarm that country’s leaders (Rome et al., 25/10/2022). Indeed, in February 2023, international atomic monitors in Iran detected uranium enriched to 84% purity—a level just below nuclear weapons-grade. This obvious provocation could have been a test-run aiming to clear the way for the eventual production of weapons-grade uranium should the regime judge the moment propitious. It has, by extension, also tested the resolve of the international community. The Government of Iran had previously told the International Atomic Energy Agency (IAEA) that its centrifuges were only configured to produce uranium at 60% purity, which is well within the bounds of normal civilian nuclear use (Tirone, 19/2/2023).

17. Western initiatives to upend the logic of unending conflict with Iran have periodically surfaced, but all have failed to affect the kind of change necessary to reverse underlying sources of tension. The fundamental problem remains the nature of the Iranian regime, although a myriad of practical challenges also make reconciliation extraordinarily difficult. The most important of these efforts, the signing of the JCPOA, aimed at containing Iranian efforts to develop a nuclear military capability. The US withdrawal from the agreement, as well as the Government of Iran’s actions since this decision, has rendered the possibility of saving the agreement, even in a modified form, highly unlikely.

18. Iran, the five permanent members of the UN Security Council as well as Germany (P5 +1) and the EU, signed the JCPOA in July 2015. The primary ambition was to slash Iranian stockpiles of low-enriched uranium by 97% for 15 years and thus push the regime back from the threshold of nuclear arms possession. As part of the deal, Iran was required to place two thirds of the centrifuges needed to enrich nuclear fuel in storage and neither engage in spent fuel reprocessing for 15 years nor build or acquire heavy water reactors in that period. The Government of Iran also agreed to the Additional Protocol contained within the Nuclear Non-Proliferation Treaty (NPT) that called for continued monitoring and verification to ensure that it complied with its obligations to fulfil the terms of the Treaty. The IAEA was accorded oversight of Iran's nuclear supply chain and 24/7 access to declared nuclear sites including the Fordow and Natanz facilities. The number of inspectors carrying out these functions tripled. The agreement also stipulated that Iran could be sanctioned if it failed to respect the terms of the NPT.

19. A fundamental goal for the international community was to extend the breakout time Iran would need to make a nuclear weapon from two months to one year. In exchange, the Iranian regime sought relief from international sanctions, which had undermined its economy, and to recover an estimated USD 100 billion in frozen assets. If full compliance were achieved for eight years, the EU would lift sanctions on Iranian companies, individuals and institutions, and the United States would end secondary sanctions against firms doing business with Iran. The JCPOA, however, did not address US sanctions relating to human rights matters, Iran's missile programs and terrorism.

20. Were Tehran to violate any of the provisions, the agreement included a snapback clause that would trigger renewed P5+1 sanctions. Resolution 2231 of the agreement would permit resumption of UN sanctions on the Iranian regime in case of "significant non-performance" of commitments under the JCPOA. The agreement does not precisely define what constitutes "significant non-performance", but suggests that only violations of the nuclear deal itself can drive a snapback decision. Technical prohibitions on exporting weapons like the drones recently sent to Russia could not trigger the snapback. The resolution suggests that states seek to resolve disagreements through the deal's dispute resolution mechanism before invoking snapback. The snapped-back resolutions would call on countries to impose export controls, travel bans, asset freezes and other restrictions on individuals, entities and banks involved in certain Iranian nuclear and missile activities. Governments and the EU would be required to incorporate these restrictions into law and were the snapback provision to be invoked, most of Iran's nuclear activity, including that permitted under the JCPOA, would be prohibited (Rome and Dugit-Gros, 25/10/2022).

21. While many in Europe were concerned by the US withdrawal from the JCPOA, the decision was welcomed in Israel, which had long warned that the deal was flawed as it had not included restrictions on Iran's missile program and, more broadly, because it assumed that Tehran could be trusted to respect the terms of the agreement. While there are still aspirations to keep the JCPOA alive to exercise some leverage over Iran's nuclear program, Europe has grown increasingly frustrated with Iranian violations, threats and hostile actions in Ukraine, the Gulf and Europe itself. Reports of enhanced Iranian espionage activity in Europe and ICRG support for extreme right-wing antisemitic terrorists in Germany represent yet another setback. Germany and the EU are now exploring the possibility of listing the IRGC as a terrorist organisation for these actions and for its link to terrorists operating in Europe (Iranintl.com, 31/12/2022). The Government of Iran is rapidly losing any residual European trust that it will act in good faith.

22. Governments in the Gulf initially applauded the Trump Administration's decision to pull out of the JCPOA, but, reflecting their own concerns about the future of US engagement in the region, several subsequently suggested that it ought to be revived in some form (De Young and Sly, 2021). Gulf leaders had initially interpreted the JCPOA as yet another manifestation of a changing US assessment of its regional interests and an attempt to deal with the last major US strategic concern in the region—the Islamic Republic's nuclear ambitions. If this problem could be shelved, some in

the region worried, the US would have a free hand to move military assets and diplomatic attention towards Asia (Feierstein, 22/8/2022).

B. THE 2022 IRANIAN UPRISING

23. Beginning in September 2022, Iran was gripped by a popular uprising triggered by the tragic death in police custody of 22-year-old Mahsa Amini after she was detained for alleged improper veiling. In the wake of Amini's funeral, widespread protests quickly spread to over 100 cities, including Tehran, in open defiance of the regime (Alinejad, 2022). Despite an increasingly violent crackdown on protesters, demonstrations continued in various forms and public dissatisfaction and anger with the regime has never been as apparent as it is today¹. Economic grievances, a lack of political freedom and perceived government incompetence cascaded into an uprising that galvanised Iranian society (Takeyh, 2022).

24. Indeed, the backlash against Mahsa Amini's murder at the hands of the regime marked a turning point in societal resistance to the clerical regime (Rojhelati, 7/10/2022). The government in Tehran has faced protests and public resistance in the past, most notably in 2009 and 2019. In those instances, however, the regime was able to quash dissent effectively but brutally. The women-led protests that began in September 2022 represented a different and possibly more enduring challenge for the regime. Indeed, while Iranians regardless of gender, ethnic, religious or socioeconomic background took to the streets, it is the unified opposition of women against the clerical regime that has driven this resistance movement. Opposition to Sharia-based laws such as the compulsory wearing of the hijab has been an enduring source of tension in post-revolutionary Iran and the women's movement has long coalesced around that issue as its harsh application came to epitomise generalised discrimination against women (Bajoghli, 2022). Inspired by the courage of Iranian women to stand up to the repressive regime, protestors across the country unified around many strands of dissent – especially the dearth of economic opportunity and a strong feeling political disenfranchisement – and directly targeted their discontent towards Ayatollah Ali Khamenei and the regime over which he presides. While previous movements focused on singular issues such as electoral integrity, the recent uprising represents a fundamental departure insofar as it has put into question the very legitimacy of the regime in the eyes of the Iranian people.

25. Some have described protests in Iran as an element of a broader so-called "Shia Spring" that has also been evident in Iraq and in Lebanon, where Hezbollah has been the target of myriad protests for misrule and corruption. But there are obviously specific characteristics in the Iranian uprising which can be understood as a uniquely domestic protest movement that has grown ever more broadly based in recent years. The Iranian regime exercises powerful influence beyond its borders, so these protests resonate across the regions in ways that the clerical regime fears. At the very least, it dramatically counters the Government of Iran's narrative that it alone offers a model regime for other Shia communities in the region.

26. The regime, however, can avail itself of powerful tools of oppression and, for example, has deployed the Islamic Revolutionary Guard Corps (IRCG) against demonstrators. Although these vicious operations have compelled demonstrators to limit their presence on the street, they have done nothing to help the regime win the argument. Proposals such as those from the president of the Iranian Parliament, Mohammed Baqir Qalibaf, which evoked the possibility of changing laws on the hijab, suggest the regime was deeply aware of the public discontent and felt beleaguered and

¹ In 2023, efforts by the Iranian regime to crackdown on protestors resulted in the scale of the demonstrations to subside notably. However, acknowledging the reduced scale of the protests should not be confused with doubting the efforts and activities of the movement's participants (Batmanghelidj, 2023).

desperate. Ultimately, however, the decision was taken to continue with a crackdown on any dissent, and new legislation was adopted² to enforce the wearing of the hijab, including heightened surveillance using artificial intelligence to identify those defying the rule. In April 2023, Iran's Supreme Leader Ayatollah Ali Khamenei went so far as to declare that "removing hijab is not Islamically or politically permissible" (Karimi and Gambrell, 2023).

27. The concerns of Iran's governing elite are certainly justified. In contrast to previous demonstrations, the recent spate of protests is not limited to the middle class or to specific regions of the country. They mirror the broader society in its socio-economic, ethnic, and geographic diversity, and public demands have indeed been more comprehensive than in previous waves of demonstrations. Women, whose numbers approach 40 million in Iran, and young people, have driven the protests and their slogans reveal ever deepening frustration and anger: "Woman, life, freedom"; "we don't want the Islamic Republic"; "I will kill, I will kill, those who killed my sister"; "Death to the dictator, be it Shah or Ayatollah"; "We are all Mahsa, we are all in this fight together" (IranWire, 2022). Young people are particularly alienated from the regime, and this is consequential as 85% of the country is under the age of 55. The regime's ideology, over which an 83-year-old Supreme Leader presides, fails to resonate with this demographically important sector of society and their scepticism is reinforced by declining economic prospects linked to the country's poor economic performance and mounting isolation. This disconnect with Iranian society is placing enormous pressure on the regime, and it faces a choice either to advance reforms or ratchet up pressure on a society that is on the verge of exploding. It now appears to have chosen the latter course.

III- THE CHANGING GEOPOLITICAL LANDSCAPE IN THE GULF

28. In recent years, the geopolitical landscape in the Gulf has changed dramatically. As noted above, the countries of the region play a large role in the global economy, and their relative economic weight only grew in the context of Russia's attempted takeover of Ukraine. Despite attempts to reduce the overall dependence on fossil fuels, the world remains reliant on the Gulf for constant and reliable supplies of oil and gas. These conditions are likely to persist for the foreseeable future, thus ensuring the wealth and diplomatic weight of the region (Zakaria, 2023).

29. The geopolitical consequences of this development are notable and have reshaped the broader Middle East. Gulf States have surpassed previous dominant players in the region and are now driving a new approach to foreign policy. Regional actors are hedging their bets and maintain links to rival global powers with the aiming of advancing their short- and long-term interests (Zakaria, 2023). Furthermore, leading Gulf States such as Saudi Arabia and the UAE, weary of perceived US disengagement from the region, are leveraging their relative diplomatic weight to promote rapprochement with previous foes to reduce regional instability. A common consensus is building in the Gulf, despite continued divergences, that in a world characterised by growing competition between great powers, stability and security must be prioritised over regional rivalries and zero-sum calculations (Mazzucco, 2023).

30. The Iranian threat has long constituted the central strategic challenge to the Gulf monarchies and their concerns about the clerical regime have provided a foundation for the region's engagement with other countries, including the United States and its Allies. But other countries in the Middle East

² A group of experts from the UN Human Rights Council noted that "such repressive and draconian measures are a manifestation of gender-based persecution and would lead to unacceptable levels of violations of the rights of women and girls in the Islamic Republic of Iran" (UNHCR, 2023).

and North Africa (MENA) region have their own reasons to worry about the ambitions of the regime and its proclivity to interfere in their domestic affairs. This has provided one foundation for emerging diplomatic activity that is producing a decidedly more complex diplomatic map throughout the MENA region.

A. THE ABRAHAM ACCORDS AND GULF ENGAGEMENT WITH SYRIA

31. Among the cross-cutting diplomatic developments throughout the Gulf and the broader Middle East, the so-called Abraham Accords have been one of the most surprising and potentially consequential. Bahrain and the UAE signed agreements to establish diplomatic relations with Israel at the White House on 20 September 2020. Although Egypt and Jordan had made peace with Israel decades before, these agreements marked a potential sea change in Middle East diplomacy, despite underlying and unresolved tensions between the Gulf monarchies and Israel—the most important of which is the failure to end the conflict between Israel and Palestine. That said, there had long been a degree of quiet cooperation between Israel and several Gulf countries on shared interests and particularly on matters pertaining to the Iranian threat. In recent years, this cooperation intensified and became more visible as the Gulf monarchies recalibrated their strategic priorities. Worried about American disengagement from the region and the creation of a potential security vacuum, these states saw the dialogue with Israel as an element of a broader hedging strategy (Mazzucco and Alexander, 2022). It should be noted that the GCC is not a unanimous bloc and the character of bilateral relations with Israel varies considerably (Rahman, 2021).

32. Although the threat posed by Tehran has provided a foundation for forging closer diplomatic ties between these erstwhile enemies, other areas of shared concern include the influence of the Muslim Brotherhood and matters pertaining to trade and technological development. While the United States helped to broker, and welcomed, the Abraham agreements, they also reflect the region's yearning for greater strategic autonomy and the willingness of the Gulf monarchies to carve out their own diplomacy independent of external actors—a potentially beneficial development for the United States and Europe insofar as it might help stabilise the region by tightening ties among formerly hostile regional actors. This, in turn, could allow Allied countries to focus more attention on pressing strategic challenges elsewhere. Within an international system that is undergoing profound changes, the way in which Gulf States address persistent challenges to regional security will not always align with the preferences of the United States or its European allies. The region's expanding links to Russia and China provide a case in point.

33. The Abraham Accords have helped to foster an environment in which greater cooperation among regional actors is more likely. This has been exemplified by the Baghdad and Negev summits, as well as the Israel-Lebanon Maritime Agreement (Vakil and Quilliam, 2023). Although Israel and the Gulf Monarchies certainly do not have identical security interests, they nonetheless share a powerful interest in containing Iranian adventurism. Indications of deepening collaboration could enhance deterrence in the region and help signatories address other security challenges beyond Iran. For example, naval exercises engaging Israel, Bahrain and the UAE have already been facilitated under the auspices of US Centcom.

34. Although the Accords only engage a small number of states, they have nonetheless opened the door for other Arab countries to reassess relations with Israel. Morocco and Sudan, for example, have established their own diplomatic relations with Israel. The agreements importantly open the door for substantial economic cooperation. Not coincidentally, a flurry of commercial agreements with Israel followed on the heels of the signing of the Accords. For example, Israel and the UAE signed a free trade agreement – the first of its kind between Israel and an Arab country – within a Comprehensive Economic Partnership in May 2022, which could ultimately exempt 96 per cent of

traded goods from customs duties. The Water for Energy Agreement³, signed by the UAE, Israel and Jordan in November 2021, is another example of deepening ties and integration. The isolation of Israel, an important potential engine of development for the region, has long impeded wealth-generating regional trading ties and technology exchange.

35. The Accords have helped signatories play new and positive roles in the region. While there were signs this was transpiring, particularly with regards to trade and economic development, the outbreak of the current conflict in Gaza has lowered expectations that the Abraham Accords could be extended to other Gulf countries. The humanitarian crisis in Gaza has become catastrophic since Israel has intensified its response to the outrageous terrorist assault committed by Hamas on 7 October 2023. Reactions from the Gulf countries, including those that had previously signed the Abraham Accords, signals a reluctance to keep the broader normalisation process on the agenda - at least for the immediate future. How the current situation unfolds in Gaza will powerfully condition relations between Gulf states and Israel going forward.

36. Other surprises have emerged from this diplomatic fluidity, although not all are welcome. In March 2022, Syrian President Bashar al-Assad visited the UAE, the first Arab country to host him since the onset of the civil war in his country 11 years earlier. Assad has long been languishing in diplomatic isolation, including exclusion from the Arab League, for his government's abominable conduct of the long and bloody civil war in which it enlisted the support of both Russia and Iran. Damascus has, however, now begun to normalise relations with its Gulf neighbours and, following pressure applied by Saudi Arabia and the UAE, was formally readmitted to the Arab League in May. Although the reasons for this limited reengagement are complex and varied, Gulf states have acknowledged geopolitical realities and shifting expectations in the region, including the apparent staying power of Bashar al-Assad himself. Seeking greater stability in the region, Gulf states hope Assad's normalisation could lead to the return of Syrian refugees and lead to cooperation on matters of shared concern like the sudden proliferation of Captagon, an addictive amphetamine produced in Syria. However, some regional actors such as Qatar, Jordan and Kuwait have urged caution and called for Syria to demonstrate greater willingness to reach a political solution to its civil war (Lewis and El Safty, 2023). The perception of a US pivot away from the region may be why this normalisation process has continued despite objections from the United States, which has also argued that relations with Syria should not restart until progress is made towards a political settlement of the civil war (CRS, 2023). Recognising that al-Assad is here to stay and seeking to counterbalance Tehran's influence in the country, however, has encouraged the Gulf monarchies to reengage with al-Assad and to offer a degree of sanctions relief (Harb, 17/10/2021).

37. Five months since Syria's return to the Arab League, the Assad regime has taken no concrete steps to foster political reconciliation, deal with the root causes of terrorism, encourage voluntary returns of refugees, or tackle the illicit drug trade (e.g., Captagon). Some Arab countries have been clear in expressing their ongoing displeasure with and distrust of the Syrian regime. Meanwhile, the potential for a broader regional conflict emerging out of the conflict in Gaza cannot be discounted and would potentially open new avenues for the exercise of Iranian influence across the region, including in Syria.

B. FALLOUT FROM RUSSIA'S WAR ON UKRAINE

38. Russia's war of aggression against Ukraine has had an impact on the Gulf in several important ways. Firstly, it has triggered an energy and commodity price crisis that has struck the world economy

³ The Water for Energy Agreement outlined a plan for an Emirati company to build a solar plant in Jordan to produce and supply electricity for a desalination plant in Israel, which would in turn supply water to Jordan (Maher, 2022).

and poses daunting challenges for Allied countries, particularly in Europe. This has shaped Western energy ties with the Gulf and generated new complexities in inter-state relations within the region. The relative weight of the Middle East and particularly the Gulf in global oil markets has also increased because of the war, which has accorded the monarchies additional diplomatic leverage.

39. In 2021 the United States was the world's largest producer of oil, producing 16.6 million barrels a day, followed by Saudi Arabia at 11 million, Russia at 10.9 million, Canada at 5.4 million, Iraq at 4.1 million, China at 4.0 million, the UAE at 3.7 million and Iran at 3.6 million (Fleck, 6/12/2022). With Western countries scrambling to diversify away from Russian oil, demand for alternative energy sources quickly shot up, triggering a significant price rise. China's Covid-induced lockdowns constituted one off-setting factor and helped keep energy price rises in check as its own energy demand fell. Its return to normal market activity is now generating some concern about the energy supply outlook among those in Europe focused on procuring oil and gas for the coming year.

40. Gas markets are far more segmented than are oil markets as much of it is shipped by pipeline, which limits the capacity to arbitrage gas globally. LNG exports, however, are rising, partly for security reasons and this, in turn, is deepening global gas market integration. LNG sales will continue to increase as LNG shipping and receiving capacity expands. The war in Ukraine is helping to ensure the growth of LNG use and has demonstrated why it offers an important vehicle for hedging in uncertain times. In 2021, the United States was the world's largest gas producer at 975 billion cubic meters (bcm) followed by Russia at 791 bcm, Iran at 239 bcm, China at 209 bcm, Canada at 191 bcm, Qatar at 169 bcm, Norway at 119bcm and Saudi Arabia at 101 bcm (Yearbook.enerdata, n.d.). US LNG exports to Europe have played a critical role in helping the continent manage the precipitous decline of energy trade with Russia.

41. Indeed, Allied and several partner countries have responded to Russia's war by slashing their consumption of Russian oil and gas. The ambition for many allies is to end this trade all together. A number of gas pipelines from Russia, including Nord Stream 1, have been closed and a price cap on Russian oil, enforced through shipping insurance controls, has begun to hit Russian earnings. The initial impact of these measures, however, tightened oil and gas market conditions leading to substantial prices rises which struck a global economy that was just beginning to recover from the shock of the Covid-19 pandemic.

42. The expectation in Washington and Brussels was that the Gulf countries would respond to the war by increasing supply and thus easing the impact of the global price shock. Yet, at an Organization of the Petroleum Exporting Countries OPEC+ meeting⁴ in Vienna in October 2022, members of the cartel did exactly the opposite and agreed instead to a 2 million barrel per day production cut to bolster oil prices. This decision came at a time when the West felt particularly vulnerable to Russian energy blackmail and the global economy was teetering on the edge of a recession (Alterman, et al., 7/10/2022). In pushing for a production cut, Russia had two primary objectives: 1) to raise national revenues just as the international community was moving to inflict economic hardship due to its ongoing invasion of Ukraine; and 2) to inflict economic damage on the West. This decision, justified in broader OPEC circles as a rational response to an expected global economic downturn, came soon after President Biden had travelled to Riyadh in July 2022, among other reasons, to reset US-Saudi relations and encourage continued energy flows from the region to ensure global economic stability of severe uncertainty.

43. Washington and Brussels saw the OPEC+ decision as both a betrayal and a gift to Russia. "We are re-evaluating our relationship with Saudi Arabia in light of these actions and will continue to

⁴ OPEC is comprised of 13 member countries, while non-OPEC which nonetheless export crude oil are included in the OPEC+ grouping.

look for signs about where they stand in combatting Russian aggression”, President Biden said afterwards (Hokayem, 6/12/2022). Riyadh strongly objected to that interpretation, arguing that OPEC was merely seeking to stabilise prices in the face of costly oil price fluctuations that had injected greater risk into markets. Price stabilisation, as Suhail al-Mazrouei, the UAE’s Energy Minister, argued, would encourage continued investment in production and sustain supply over the longer term. The Kuwait Foreign Ministry also backed this economic interpretation of the decision (El Dahan, 18/10/2022). For their part, the Saudis feared that a fall in oil prices linked to Covid-driven lockdowns in China and possible recession in the West would significantly cut into their own earnings and undermine their investment in economic diversification. Part of the dynamic, however, is that the United States is no longer a customer of Gulf oil. It is rather the region’s most important competitor and yet decisions made in the Gulf shape prices Americans pay at the pump. The fungibility of global oil markets gives lie to the illusion of achieving oil market “independence” (Meyer, 19/3/2023).

44. Saudi Arabia and other OPEC members more broadly asserted that market stability over the longer term demanded continued investment to maintain capacity. This, they argued, could only be achieved if crude oil were priced at between USD 80 and USD 90 a barrel. Some OPEC leaders seemed to expect Washington to support this logic as these are prices at which unconventionally pumped US oil can be economically produced (Ibish, 14/10/2022). This argument failed to gain currency in either Washington or Brussels and the level of disappointment with the decision was palpable as oil prices had risen from USD 60 per barrel in April 2021 to USD 120 per barrel in April 2022 (Hokayem, 6/12/2022). Slashing OPEC production would not only hurt Western economies, but it would also effectively sustain Putin’s energy-driven economy while undercutting international sanctions against it. President Biden threatened “consequences” for US relations with Saudi Arabia, while some in the US Congress called for a freeze in cooperation with Riyadh. A Senate Committee responded by advancing legislation that threatened to lift sovereign immunity for OPEC nations and allowing the US government to sue their oil companies under antitrust laws. While it was never voted into law, the bill both raised concern in the Gulf and signalled the high level of disenchantment in Washington (Holland, 13/10/2022).

45. Despite the strong response from the West, OPEC + agreed a second production cut in April 2023 amidst mounting concerns among oil producers that a global recession was imminent and that this would push energy prices and the rate of inflation more generally upwards. The decision was hardly welcome news among Western central bankers then coping with a dangerous series of banking crisis and struggling to rein in inflation without unduly undermining growth. The announced production cut also struck poor energy importing countries struggling to manage high debt and a rising dollar. The cartel’s decision has also invariably enhanced Russian oil sales revenues even though that country remains under sanction. The decision demonstrated once again both the enduring relevance of OPEC and Saudi Arabia’s willingness to act in its narrow energy interests whatever the ramifications are for broader economic stability (Brower et al., 7/4/2023).

C. A VISION FOR A MULTIPOLAR REGION AND GULF TIES WITH CHINA AND RUSSIA

46. The Saudis and other Gulf actors, in fact, profess to remain committed to cooperation with Washington and its Allies on regional security matters, particularly when it comes to containing the Iranian regime. However, the growing strategic importance of the Gulf and the subsequent increase of its relative influence has meant that regional actors are unwilling to follow the Western lead on all geopolitical issues, notably with regards to energy output and relations with Russia and China. Russia is an important energy partner for the region, and the Gulf States will not break ties with Moscow either because of the war of aggression it has launched against Ukraine or for its failure to adhere to liberal democratic values which they patently do not share. With regards to Russia’s war against Ukraine, the Gulf States perceive the situation as first and foremost a European crisis and have thus sought to maintain a “balanced” position, refraining from outwardly criticising the Russian

regime while not entirely adhering to its narrative (Al Sager, 2022). China is an increasingly important consumer of the region's energy and an ever-more important trade and investment partner (Singh, 2022). The Gulf Monarchies increasingly discern risks in betting on only one superpower and have sought out friends in both the East and the West when it suits their interests. China offers the region a hedge against overreliance on any one great power.

47. Developments in global oil and gas market are thus central factors in the region's evolving geopolitical landscape. In 2021, the United States purchased only 5% of Saudi exports (largely oil), Europe purchased 10%, and 50% of the Riyadh's exports flowed to China, Japan, India and South Korea. Emile Hokayem suggests that this "points to the fundamental strategic challenge faced by Saudi Arabia: its security lies in the West, its prosperity in the East" (Hokayem, 6/12/2022).

48. For its part, China has moved carefully so as not to be seen to align itself too closely with any given power in the region. But its level of engagement is growing, and over time it is expected to more actively seek to deepen ties with regional partners. For the moment, however, its diplomacy focuses primarily on identifying shared interests with regional actors including Saudi Arabia and Iran. Beijing recently announced a deal to restore diplomatic relations between Tehran and Riyadh—a process which also included facilitation efforts by Iraqi and Omani authorities (Azimi, 2023). The announcement provides yet another confirmation of the region's shifting diplomatic landscape and the willingness of the Gulf actors to work with other outside powers to shape the regional strategic map. The deal is strategically and symbolically important for China as it underscores its growing activism in the region. For the Government of Iran, the agreement helps it both to counter diplomatic isolation and deescalate tensions with its Gulf neighbours (Gallagher et al., 2023) For its part, Saudi Arabia has found a new means to engage with the Iranian leadership while deepening cooperation with Beijing which it sees both as a valued trading partner and as a useful counterweight to Washington. All of this reflects Saudi Arabia's broader hedging strategy (Gallagher et al., 2023). That said, the fundamental dynamics of the Saudi-Iranian rivalry endure. It is unlikely that this deal can do more than reduce certain tensions (Miller, 2023). A profound transformation in the bilateral relationship remains unlikely for now.

49. China has a 25-year cooperation agreement with Tehran and has been an important oil customer for that country despite international sanctions. It has supported its membership in the Shanghai Cooperation Organisation and conducted naval exercises with Iran and Russia in the Gulf of Oman (Moonakal, 2022). Iranian President Ebrahim Raisi recently visited China to deepen cooperation, particularly on the trade front. While Beijing has begun to purchase more oil from Russia instead of Iran due to the dramatic discount in Russian oil prices linked to sanctions, it views Tehran's long-standing rivalry with the United States with a degree of sympathy. Their shared suspicion of Washington provides a foundation for the relationship (Tiezzi, 2023).

50. There are, however, limits to China's relationship with the Government of Iran, as it must balance engagement with Tehran against its increasingly important ties with Saudi Arabia and other Gulf monarchies. These ties transcend energy trade and include shared geostrategic interests and trade in the telecommunications, technology and infrastructure industries, which have been packaged within the Belt and Road framework. Indeed, the Gulf monarchies have shown little of the hesitation about Chinese technology that is increasingly evident in the West. Huawei, for example, is a key partner in building out the region's 5G networks and developing markets in the region is precisely what the Chinese are looking to achieve by cultivating these ties. In late 2022, China signed a comprehensive strategic partnership with Saudi Arabia, which provides a framework for deepening economic ties across all these sectors and harmonising the Kingdom's Vision 2030 and the Chinese Belt and Road Initiative (BRI) (El-Khazen, 2022). It has also sought to make itself an indispensable partner to other regional modernisation and technology initiatives like Oman's Vision 2040, Qatar's Vision 2030, and Kuwait's Vision 2035. Economic diversification is very much part of these strategies, and the region's governments see China as a key partner for these purposes.

51. China has also forged increasingly important military ties with the region. It established a naval base in Djibouti at a strategic point near the entrance to the Red Sea across from Yemen. It claims that its role there is to fight against piracy and protect critical shipping in these strategic waters. Notably, however, the base has facilities capable of hosting aircraft carriers and nuclear submarines, which points to China's longer-term strategic ambitions in the region (Tanchum, 14/12/2021).

52. The Gulf countries also see China as an important potential supplier of military equipment and technology and a means to limit their overreliance on the West. The Saudis, for example, have established a plant to manufacture Chinese unmanned aerial vehicles (UAVs) which will both deepen defence ties with Beijing and advance the Kingdom's broader industrial technology modernisation agenda as laid out in the Vision 2030 program. At the Zhuhai Air Show in November 2022, Riyadh purchased USD 4 billion of Chinese weapons, reflecting a burgeoning trend as its arms trade with Beijing jumped 386% between 2016 and 2020 (El-Khazen, 2022). China has thus emerged as a key alternative weapons supplier to the region and this offers yet another avenue for the Gulf Monarchies to reduce their geo-strategic dependence on the United States and Europe (Iddon, 2022).

53. China itself remains relatively cautious in its approach to the Gulf, and energy constitutes its priority. In 2020, it replaced the EU as the region's top trading partner with bilateral trade valued at USD 161.4 billion that year. China is now Saudi Arabia's most important oil purchaser, buying roughly one quarter of Saudi Arabia's crude exports. It has also signed a 27-year deal with Qatar Energy for LNG, which is currently the world's longest-term LNG agreement. China, of course, has also increased its purchases of Russian energy at discounted prices since Russia launched its war on Ukraine. But Beijing does not want to rely too heavily upon a country that it does not entirely trust despite the partnership these two authoritarian states have forged. The Gulf countries provide a useful energy counterweight in this sense.

54. The region has its own reasons for deepening ties with China and these became apparent at the first China-Arab States Summit held in Saudi Arabia in December 2022. Indeed, those discussions revealed a shared vision for a multipolar Middle East (Bachulska and Bianco, 2023). Along these lines, Saudi Arabia, the UAE and Oman have all signed strategic partnership agreements with China and all three have seen significant Chinese investment in their ports under the auspices of the BRI. In 2022, Saudi Arabia was the largest single recipient of BRI investments and took in USD 5.5 billion in FDI from China. Beijing sees the Saudis as the key player in the broader Middle East and its investments are clearly strategic in nature and opens a doorway to the rest of the region.

55. The Chinese-Gulf relationship does not come without risks. There are, for example, obvious concerns both in Riyadh and Beijing that China's ties with Russia could complicate this relationship, particularly were China to provide direct military support to Russia in its war against Ukraine. China has so far refrained from offering the kind of assistance to Russia that might trigger US and European anger and possibly even sanctions. But this possibility is looming over its economic diplomacy in other regions, including in the Gulf (Bachulska and Bianco, 2023).

56. As for Russia, Saudi Arabia has identified shared interests with the Kremlin not only on energy matters but also on military ones including possible purchases of Russian air defence systems, despite its close security relationship with the United States and Russian ties to Iran. Riyadh's outlook is shared to various extents across the GCC and explains why Gulf States were reluctant to openly criticise Russia for its illegal invasion of Ukraine. They continued to conduct business with Russia while their North American and European partners launched a series of sanctions against Putin's regime. Saudi Arabia, along with other Gulf actors, however, has provided financial aid to Ukraine, and, in recent months, positioned themselves as potential mediators in the conflict. For example, peace talks which supported Ukraine's territorial integrity were hosted in Jeddah in August 2023 and attended by 40 countries, including China, India and other Gulf States (Santora et al.,

2023). Needless to say, Russia did not attend these discussions which focused on Ukraine's proposals to end the conflict.

57. Russia's ever closer ties with Tehran constitute one source of concern among the region's governments which had not expected the West to respond with such unity of purpose in supporting Ukraine. The Saudis subsequently voted to condemn Russia's annexation of parts of Eastern Ukraine in the UN and have also provided notable humanitarian assistance to Ukraine. But a broader shift is underway in Riyadh's foreign policy as it asserts its own autonomy and global influence and seeks to move beyond the entanglements of regional politics that have not served its greater interests, including long-time support for the governments in Yemen, Lebanon and even Jordan. It has backed away from unquestioning support for the Muslim Community in Kashmir while establishing closer ties to India and cultivating diplomatic and economic relations with China despite that country's crackdown on the Muslim Uighur community in Xinjiang. This points to a concerted effort by Mohammed bin Salman, the Crown Prince of Saudi Arabia, to recalibrate the country's diplomacy in order to prioritise its geo-economic and geo-political interests (Hokayem, 6/12/2022).

58. All that said, the Western powers and particularly the United States remain critical to regional stability. For example, only France and the United States provided Saudi Arabia with defensive military systems after the Houthis attacked key oil installations in 2019, which may suggest there are limits on Riyadh's quest to balance its relations with the United States, Russia, China and Europe. The West, and particularly the United States, remains its most reliable security partner despite concerns about the American's growing focus on Asia.

59. In the months since OPEC first took the decision to cut energy production and after getting over its obvious disappointment with that decision, the US administration has refocused attention on its security ties with Saudi Arabia and the region. From the US perspective, concerns about Russian and Iranian challenges in the region, as well as China's growing regional presence, have essentially trumped the dispute over oil production limits, although underlying sources of tension between the Saudis and the U.S. persist. Following the controversial October OPEC meeting, the U.S. scrambled jets toward Iran when intelligence reports suggested a possible attack on Saudi Arabia. The following month, the State Department recognised that as the acting head of government, Mohammed bin Salman was immune from a lawsuit filed by the fiancée of Jamal Khashoggi, the Saudi dissident and *Washington Post* journalist assassinated at the Saudi Consulate in Istanbul. The Biden Administration also took a decidedly less alarmist position to the second OPEC production cut decision taken in the spring of 2023, perhaps because that decision was taken when prices were significantly lower than the previous year when prices had skyrocketed. Intimations that the Saudis are looking to end the war in Yemen and a provision of USD 400 million in humanitarian assistance to Ukraine provide another indication that relations between Riyadh and Washington are improving, although Congress has not approved any arms transfers to the Kingdom since the OPEC 2022 decision and criticism linked to the Khashoggi case persist in Congress (Ryan, 2022). The apparent suspension of efforts to revive the JCPOA and the futility of fostering a dialogue with the Iranian regime while it engages in a vicious domestic crackdown has provided more space for a consolidation of US-Saudi relations. Riyadh has also improved relations with Qatar and Türkiye in recent years.

IV- EUROPEAN OUTLOOKS ON THE GULF

60. Although the EU does not play a strategic military role in the Gulf in the way that the United States does, it has a vital interest in the stability of the region, its economic development and in continued access to its energy exports. Efforts to reduce reliance on carbon-based fuels over the

longer term and to defend human rights factor into the block's views on the Gulf, but these sometimes conflict with its primary interests, particularly ensuring Europe's short- to medium-term requirement for continued access to the region's energy exports. The EU, like the United States, must therefore play a balancing game among immediate requirements, enduring values and longer-term aspirations.

61. Despite outstanding tensions, a Joint Communication of the European Commission (2022) on relations with the Gulf describes a budding "strategic partnership" between Europe and the Gulf on matters like sustainable energy, peace and security and human rights. Given the challenges on all of these fronts in the Gulf, the possibilities for a genuine strategic partnership on these foundations seem somewhat remote (Van Veen, 4/5/2022). Trade and investment opportunities, however, are likely to drive European engagement with the Gulf. The EU is the second most important trade partner of the GCC after China. Almost a fifth of total GCC imports came from the EU member states in 2020 when trade volume between the two approached EUR 100 billion (European Commission, 2022).

62. The importance to Europe of the energy relationship with the Gulf countries has only increased in the wake of Russia's war against Ukraine. The energy fallout from that war, including wide-ranging sanctions against Russia, has compelled Europe to increase gas and oil imports from the region. Germany, which is seriously challenged to replace Russian gas needed by both industry and consumers, recently signed a 15-year energy partnership with Qatar, the world's third-most important natural gas exporter (Al Jazeera, 2022). European governments need to assess what they can do to bolster security in the region to help ensure access to this critical energy. This assessment should recognise the value of remaining engaged diplomatically with the governments of the region while recognising the challenge of Russia and China's growing activism in the region. The Gulf region also aspires to play a critical role in the development and production of sustainable energy which remains a top priority for the EU and most of its member states. There are expectations that the Gulf will become a "regional hub" for the production and distribution of sustainably produced hydrogen, and in the future, Europe would likely be a primary client for this relatively clean source of energy. (Sons, 2023).

63. Several European Allies have established a military presence in the region (Bianco, 2020). The RAF's operational headquarters in the Middle East is located at Al Udeid air base in Qatar. It also has use of Al Minhad airbase in the UAE and Al Musannah airbase in Oman. The UK Naval Support Facility in Bahrain is its primary naval facility in the Persian Gulf. The UK opened a permanent Joint Logistics Support Base in Oman in 2018. It is designed to support the new aircraft carriers when these are deployed in the Indian Ocean/Persian Gulf (Brooke-Holland, 2020). In 2009, France built its first permanent military installations outside of French territory in fifty years in the Gulf. The base in Abu Dhabi hosts French naval, air and army assets. The facility at the Emirate's Al Dhafra air base can accommodate Mirage and Rafale jets while the naval base at Mina Zayed can host all French naval ships except aircraft carriers. In a speech to open the facility, then French President Sarkozy said, "The permanent French military installation in Abu Dhabi shows the responsibility that France, as a global power, agrees to assume with its closest partners, in a region that is a fault line for the whole world" (Saltmarsh, 2009).

64. The EU itself has deepened ties with friendly governments in the region and communicated European interests in helping to preserve regional stability. In May 2022, the EU announced a strategic partnership with the Gulf that aimed to expand EU-GCC cooperation based not only on economic and energy matters, but also on shared security concerns. These include enhancing maritime security, counterterrorism efforts and cyber security (European Commission, 2022). Some in Europe have linked Europe's presence in the region as reflecting a broader ambition for European strategic autonomy, but without a doubt American power remains the lynchpin of Gulf security despite evolving US relations with the region (European Parliament, 2022).

65. European and US views on the region do not always align perfectly. For instance, following the US exit from the JCPOA, the other signatories, including the EU and the United Kingdom, continued engaging with Tehran not only on nuclear matters but also on concerns about human rights and the war in Yemen. The EU also launched the European Maritime Situation Awareness mission in the Hormuz Strait in January 2020 in response to a series of attacks targeting commercial vessels in the Gulf in 2019, which followed EU member states' refusal to join the US-led naval mission in the same region (Pejsova, 2020).

66. Several factors constrain the EU from further expanding its presence and influence in the region. The United States has clearly not abandoned the Gulf and is not likely to do so. It remains the largest weapons provider to the GCC and maintains a sizeable, if reduced, military presence in the region. The EU remains internally divided on both the direction it should take on foreign policy and defence strategy as well as in finding the correct balance between preserving European interests and upholding Western values such as democracy and human rights. The EU-GCC strategic partnership document reflected these tensions in recognising that that “human rights, democratisation, and rule of law-related challenges remain” outstanding between the two sides (European Commission, 2022). Finally, to have a decisive impact on the numerous complex and longstanding conflicts in the region would require the mobilisation of significant political, military and diplomatic resources, which many European capitals would be reluctant – or would be unable – to provide anytime soon.

67. EU-Gulf relations will continue to focus on deepening economic and energy ties, international development, enhancing cooperation on climate change and the energy transition. The United Nations COP28 will be hosted by the UAE in 2023, where Abu Dhabi will likely look to engage with European countries on climate change adaptation and mitigation. In addition, the EU is likely to provide stronger support to the Saudi Green Initiative and the Middle East Green Initiative (European Commission, 2022). Broader foreign policy ambitions in the region, however, will be tempered by a combination of EU-wide cleavages about European strategic autonomy, the current lack of defence resources to match those ambitions insofar as they cohere, and the complex geopolitical dynamics within the Gulf region.

68. Meanwhile, EU-Iranian relations have also shifted from limited engagement to more direct confrontation (Alcaro et al., 2023; Adebahr, 2023). The 2016 EU Global Strategy document, reflecting a post-JCPOA sense of optimism, included a passage on Europe's willingness to “gradually engage” Iran on trade, environment, energy, anti-trafficking and migration (EUGS, 2016). De-escalation and the eventual resolution of active conflicts in the region such as Yemen and Syria might have followed had the JCPOA been effectively implemented. Following the US withdrawal from the deal, the EU struggled to ensure Iranian compliance with the terms of the agreement (Geranmayeh, 2022). It also established the Instrument in Support of Trade Exchanges (INSTEX), a special instrument to facilitate non-US dollar and non-SWIFT transactions between Iran and Europe on items exempt from US sanctions (Mason, 2022). Relations have since worsened, however, because of the regime's contemptible crackdown on its own people.

69. Further complicating Tehran's relationship with European governments is the regime's practice of detaining and holding European and dual Iranian-EU citizens hostage on false charges. The case of Olivier Vandecasteele, a Belgian aid worker arbitrarily detained and imprisoned in Iran, illustrates the problem. The regime continues to resort to the illegal detention of civilians to extract all manner of concessions from Western governments, including financial concessions and the release of Iranian nationals arrested abroad (Rome, 2022). The regime eventually released Mr. Vandecasteele along with three other Europeans, but only in exchange for the release of Assadollah Assadi, an Iranian official who was convicted in Belgium for his role in the foiled terror plot to bomb an Iranian opposition rally outside Paris in 2018 (Camut et al., 2023). For European governments, the challenge of dealing with a regime that is willing to use civilians as bargaining chips to gain political and

diplomatic leverage is an unfortunate reality and will have to factor into their diplomatic approach to the Government of Iran. The United States has also had to wrestle with this tension and in August 2023, for example, secured the release of five imprisoned Americans in exchange for several jailed Iranians and eventual access to about USD 6 billion in frozen Iranian assets—funds, however that the deal stipulates can only be spent to meet the humanitarian needs of the Iranian people (Fassihi and Shear, 10/8/2023).

70. The regime's actions both at home and abroad, including the most recent wave of oppression and violence it has launched against peaceful protesters and its expanding network of armed groups in Lebanon, Yemen, Syria, Iraq and beyond, have damaged the prospects for diplomatic outreach and economic engagement with Tehran. As a sign that European governments no longer feel that they can effectively use trade incentives to encourage Iran to adhere to the terms of the JCPOA, ten European INSTEX shareholders recently decided to liquidate that institution (France Diplomacy, 2023). Furthermore, the Islamic Republic's extensive material support to Russia during the war in Ukraine underlined the direct threat the malignant Iranian regime poses to the European continent (Council of the European Union, 2022; European Parliament, 2023). At the 2023 Vilnius Summit, NATO leaders called on the regime to "cease its military support to Russia" and expressed "serious concern over Iran's malicious activities within Allied territory" (NATO, 2023). The prospects of altering the current dynamics of the relationship are thus very poor.

V- NATO, THE GULF, AND THE ISTANBUL COOPERATION INITIATIVE

71. NATO's multi- and bilateral engagement with the Gulf is primarily centred around the Istanbul Cooperation Initiative (ICI). Established at the Istanbul Summit in 2004, the ICC is a forum that enables the Alliance to work more closely with four GCC states – Bahrain, Kuwait Qatar, and the United Arab Emirates – on a wide range of defence and security-related issues. While not official ICI members, Oman and Saudi Arabia participate in selected activities within its framework.

72. The ICI focuses on activities which essentially reflect shared interests jointly identified by NATO Allies and ICI partners. It is based on six core principles including: *Non-discrimination* – all ICI partners are offered the same basis for their cooperation with NATO; *Self-differentiation* – a tailored approach to the specific needs of each partner country; *Two-way engagement* – the ICI is a "two-way" partnership, in which NATO seeks partners' contribution for its success, through a regular consultation process in which partners equally express their needs and goals to NATO; *Non-imposition* – ICI partners are free to choose the pace and extent of their cooperation with the Alliance; *Complementarity* – the ICI complements the work of other international institutions in the region; and *Diversity* – the ICI respects and considers the specific regional, cultural and political contexts of its partners (NATO (a), 2022).

73. The establishment of the NATO-ICI Regional Centre (NIRC) in 2017 in Kuwait has provided yet another multilateral avenue for enhanced cooperation. The mandate of the NIRC is to serve as a regional hub for partnership and cooperation on security matters between NATO and the Gulf region through political dialogue, education and training, as well as public diplomacy. In addition, its goal is to raise awareness among key audiences about NATO, its partnerships with ICI countries and regional security matters. Since its inauguration, the NIRC has conducted 48 training courses and 39 events. Overall, more than 2,400 people from Allied countries and ICI/GCC countries have participated in its activities. As the Centre is not only open to NATO Allies and ICI countries, but also to Oman and Saudi Arabia, in addition to the GCC Secretariat, it provides a unique platform for NATO to also sustain its engagement with multiple important actors in the region. In 2022, NATO and its Kuwaiti counterparts agreed to open specific political dialogue events to selected NATO

partners such as Austria, Switzerland, Japan, South Korea, Australia, Egypt, Morocco, Tunisia and Jordan.

74. The ICI has developed politically and in terms of substance since its founding. It has established new partnership tools and activities, such as the contribution of ICI partners to NATO-led operations and missions. For example, in 2012, NATO cooperated closely with Qatar and the UAE in *Operation Unified Protector* in Libya. The UAE has also participated in NATO military missions in Bosnia and Herzegovina and in Afghanistan, developments which the Alliance regards as an example of the practical growth of the partnership. All GCC states and NATO Allies are members of the US-led Global Coalition against Da'esh. The joint work of states within the Coalition demonstrates a collective commitment on the part of GCC states and the Euro-Atlantic community to address terror threats in the region and around the world.

75. There is strong interest in the Gulf in deriving lessons from NATO's long experience in coalition and alliance management. The UAE has viewed cooperation with NATO as a key element of their regional defence posture. In 2012, it became the first MENA country to open a mission to NATO and since then has agreed to further partnership programmes to enhance operational cooperation with the Alliance. The UAE also works bilaterally with several Allies on military and security matters including the United States, the United Kingdom and France. In addition, Qatar has accelerated its engagement with NATO over the last two years with the aim of deepening bilateral and multilateral cooperation with the Alliance and its Member States on issues pertaining to regional peace and security. It 2023, it hosted NATO's Military Strategic Partnership Conference (MSPC) and Regional Exercise (REGEX)⁵, with further programmes and activities envisioned for the near future.

76. In recent years, a multilateral element of the ICI has emerged with NATO ambassadors and those from ICI countries meeting to discuss issues of common interest. At the 2023 Vilnius Summit Allied leaders recognised the value of this multilateral engagement and identified the Middle East and Africa as "regions of strategic interest" (NATO, 2023). They also committed to deepening their "political engagements and public diplomacy outreach" to long-standing partners engaged in the Mediterranean Dialogue and ICI, while also increasing collective "outreach to relevant regional organisations, including the African Union and the GCC (NATO, 2023).

77. In the context of Russia's war of aggression against Ukraine, Allies have reiterated their determination to enhance regional partnerships and engage with partners on global security challenges where NATO's interests are affected (NATO (b), 29/6/2022). Deeper political engagement with Gulf regional partners through the Alliance's various platforms for dialogue and the identification of concrete areas for cooperation to address shared security concerns can serve that purpose. NATO's 2022 Strategic Concept Conflict further elaborates on these concerns and specifically names fragility and instability in Africa and the Middle East as directly affecting Allied and partner security. NATO's southern partners and neighbours, particularly those in the Middle East, North Africa and Sahel regions, confront interconnected security, demographic, economic and political challenges. NATO recognises that these are aggravated by climate change, fragile institutions, health emergencies and food insecurity. This, in turn, provides fertile ground for the proliferation of non-state armed groups, including terrorist organisations, and enables destabilising and coercive interference by strategic competitors. In the document adopted at the 2022 Madrid Summit, Allies promised to work with partners to tackle shared security threats and challenges in regions of strategic interest in the Middle East, North Africa and the Sahel regions (NATO (c), 29/6/2022).

⁵ REGEX is a NATO-supported initiative for partner countries to plan and conduct military exercises which are formed to meet national requirements.

78. Leaders gathering in Vilnius at the June 2023 Summit made a point of again stressing the importance of the broader Middle East to the security interest of Allies. The final communiqué stated that “NATO’s southern neighbourhood, particularly the Middle East, North Africa and Sahel regions, faces interconnected security, demographic, economic, and political challenges. These are aggravated by the impact of climate change, fragile institutions, health emergencies, and food insecurity. This situation provides fertile ground for the proliferation of non-state armed groups, including terrorist organisations. It also enables destabilising and coercive interference by strategic competitors. Russia is fuelling tensions and instability across these regions. Pervasive instability results in violence against civilians, including conflict-related sexual violence, as well as attacks against cultural property and environmental damage. It contributes to forced displacement, fuelling human trafficking and irregular migration. These trends pose serious transnational and humanitarian challenges and have a disproportionate impact on women, children, and minorities. In response to the profound implications of these threats and challenges within and in the vicinity of the Euro-Atlantic area, we have today tasked the North Atlantic Council in permanent session to launch a comprehensive and deep reflection on existing and emerging threats and challenges, and opportunities for engagements with our partner nations, international organisations, and other relevant actors in the region, to be presented by our next Summit in 2024.” (NATO, 11/7/2023).

79. NATO’s Military Command in Naples plays an important role in fostering cooperation with Gulf partners. For example, the NATO Strategic Direction South Hub focuses on matter of direct relevance to its GCC partners, including the fight against terrorism, the problem of radicalisation, migration and even environmental concerns and their potential strategic impacts. The Hub also seeks to bolster regional situational awareness and encourage a shared understanding of regional threats, challenges and opportunities. It manages and shares information, assists partners in implementing individual partnership and cooperation programmes and has established Defence Capacity Building Programmes with partners throughout the MENA region.

80. Ultimately, NATO’s role in the Gulf region has focused on the immediate security requirements as understood both by Allies and the Partner countries. NATO’s presence and impact there is guided by the principles of prioritisation and feasibility. Regional challenges are significant and complex, and this highlights the importance of NATO’s engagement with the governments of the region against a background of increasing strategic competition. NATO continues to monitor regional developments there, plan for contingencies, determine where its comparative advantages lie with regard to the Gulf region and make a positive contribution to building stability. This, in turn, will require member countries to conduct a sustained Alliance-wide discussion on all of these challenges and agree on an appropriate policy course (Tardy, 11/2/2022).

VI- CONCLUSIONS

81. The war in Ukraine and the energy crisis that followed have reinforced the Gulf region’s strategic and economic importance. The region is changing quickly and increasing its relative geopolitical weight—a development that could potentially benefit Allied interests in some areas and disappoint in others. The Gulf reconciliation process and Abraham Accords are among the more positive developments to emerge, and they create possibilities for a higher level of stability in the immediate region and in the greater Middle East. The promising yet fragile ceasefire in Yemen and the diplomatic traffic between Riyadh and Tehran that preceded it also point to a newfound willingness to resolve conflicts in the region. It should be noted, however, that while diplomacy is

welcome and beneficial, the underlying causes for tensions in the region remain⁶. Recognition of this fundamental conflict of values and interest must inform regional diplomacy and strategic calculations. In this context, further analysis is required to assess the primary trends in Iranian foreign policy, especially after the China-brokered deal signed between Iran and Saudi Arabia on 10 March 2023. The deal paved the way for further Iranian efforts to normalise relations with other countries in the region. Despite these efforts, tensions persist, and it is important to consider the possibility that an outbreak of hostilities in the region could trigger a wave of migration towards NATO countries.

82. In line with their more nuanced diplomatic approach and aversion to aligning too closely with competing great powers, the Gulf monarchies have sought to counterbalance Western engagement by further developing their ties with China and Russia. OPEC's decision to cut oil production during a serious energy price shock linked to Russia's war on Ukraine underlined this trend. But the key players in the region also recognise their important stakes in maintaining ties with the West, which remains a key market for its energy, a source of technology and an important player in the region's security—primarily in counterbalancing an aggressive and increasingly unstable Iranian regime that appears once again to be advancing its military nuclear programme.

83. Indeed, the Iranian government and its proxies throughout the broader Middle East constitute one of the region's most compelling and enduring security challenges. There is broad alignment with NATO member countries on the nature of the Iranian threat and the need to ensure that a reasonable balance of power persists in the region to deter Iranian aggression, which, as the attack on Aramco oil facilities in 2019 and its military support for Russia's war on Ukraine suggest, remains a persistent threat. Mounting domestic turmoil in Iran itself only adds to a degree of uncertainty as well as promise, insofar as it demonstrates a society-wide yearning for systemic change. In any case, the regime's violent crackdown on domestic dissent and protests and its support for Russia in its war on Ukraine have helped build a stronger transatlantic consensus on the threat it poses and the need to contain that threat. The presence of European and North American military forces in the region provides a degree of reassurance to the region as does an array of partnerships between NATO and several countries in the region through the Istanbul Cooperation Initiative.

84. Allied countries need to work together to sustain pressure on the regime in Tehran and clearly send the message that violence and oppression against its own civilians, the kidnapping of foreigners, as well as Iranian-back terrorist acts will have consequences for the regime, and that Iranian support for Russian aggression and war crimes is unacceptable. Allied governments and their societies should look for ways to empower democratic voices in Iran and to support the achievement of their aspirations. Given the oppressive nature of the Iranian state, this kind of support will demand discretion and care in identifying and working with interlocutors. Iran's future lies with its people, and they should be the primary interlocutors of western governments. US leadership is crucial to the broader effort to contain Iran and block its nuclear aspirations. Further efforts are needed to prevent Iran from playing a role in Russia's illegal war on Ukraine and more comprehensive sanctions against the regime in Tehran are essential to dissuade it from engaging in foreign adventurism, end its game of nuclear brinkmanship and create new opportunities for the Iranian people to assert themselves over their repressive government.

85. The regime in Tehran continues to sponsor terrorism and uses its own military and militia groups to support these nefarious efforts. The evidence here is unambiguous, and all democratic countries, including NATO Allies and members of the European Union, should place and keep the IRGC and its subsidiary forces on their lists of recognised terrorist groups and take measures aiming to deter the IRGC's destabilising activities. Countries where these forces are present and conducting

⁶ These include Gulf enmity with Iran, the Israeli-Palestinian conflict and long-standing strategic concerns in places such as Yemen and Sudan (Hiltermann, 2023).

economic or informational operations should sever these ties immediately and outlaw any links to these terrorist organisations. Pressure must also be increased on the regime to release all foreign or dual nationals unjustly detained in that country. Solidarity with the Iranian people should remain a priority and a clear distinction must always be made between the oppressive regime and those demanding their basic human and political rights. A new consensus needs to be forged on a shared approach to the Iranian nuclear program and its nuclear aspiration. European Allies continued to engage in earnest with Iran to revive the JCPOA, but recent developments have stalled that effort with no clear pathway to achieving a sustainable agreement that satisfies the expectations of all parties. Were Iran to acquire a nuclear weapon, it would threaten regional stability and possibly trigger a proliferation dynamic that would further imperil regional and potentially Allied security. This cannot be allowed to happen and could well trigger a Western military response. Allied governments can engage Iran in focused nuclear talks and in other areas of strategic and humanitarian concern, but this must also be coupled with pressure on the regime to prohibit its acquisition of nuclear weapons.

86. NATO's ICI has worked well since its establishment in a range of defence-related issues and it has expanded in both political and practical terms over the years for the benefit of all sides, including through the establishment of working-level ties between NATO and GCC secretariats. The establishment of new partnership programmes and the expansion of existing ones provides a ready-made structure for furthering cooperation while building stability, against a background of increasing strategic competition and the Russian aggression against Ukraine.

87. Russia's war on Ukraine has clarified Allied interest in the flow of Gulf energy to global markets, particularly as an effort is underway to slash and eventually eliminate Russian oil and gas from the European energy mix. Although the longer-term goal is to move to sustainable energy models, the transition to that model will take decades. Ensuring the unimpeded flow of Gulf energy will thus remain a strategic priority for Allied and Gulf governments alike and it should continue to provide a foundation for security cooperation both within the ICI forum and bilaterally. That Iran launched a very serious attack on Saudi oil facilities in 2019 and that this attack had a negative impact on global markets suggests that the threats to this supply are real and need to be countered. Countering climate change while mitigating its impacts represents another avenue for further collaboration with Gulf countries. Allies can look to enhance cooperation with the countries in the region through stronger support of the Saudi Green Initiative and the Middle East Green Initiative. The region has the means to finance important initiatives in these fields and the trans-Atlantic community has the technological and scientific heft essential to affecting this transformation. There is ample space for deeper cooperation on this front. Allies should continue to signal that deeper cooperation between NATO and the region's governments is welcome, including the eventual participation of Saudi Arabia and Oman in the ICI.

88. As part of their broader engagement with Gulf States, Allies must continue to promote human rights in the region. Many citizens in Gulf countries are denied basic rights and, despite progress, women are still subjected to discrimination, prevented from exercising political and economic rights and are often treated as second-class citizens. Foreign workers, particularly from disadvantaged communities around the globe, continue to be exploited despite the essential role they play in supporting the region's economies. Allied governments should remain steadfast in supporting reform and integrating human rights considerations into their engagement with Gulf partners.

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