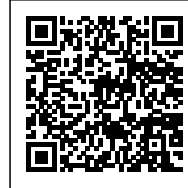




UKRAINE AND THE GULF: AGREEMENTS AND ABOUT- FACE

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The Russo-Ukrainian war—and the long list of potential global conflicts that could erupt, such as in Taiwan, the South China Sea, the Kuril Islands, North Korea and Iran—represents a rude awakening for the strategic landscape for several countries around the world, suggesting that the international order after this war (and potential others) will never be as it was before. But this is equally valid for already existing conflicts, such as those between Armenia and Azerbaijan, India and Pakistan, Palestine, Kurdistan (Turkish, Syrian, Iraqi and Iranian), Sahel, Somalia, Mozambique, etc. etc.

A new multipolar order of a different nature and contours to those that previously existed has begun to appear on the horizon, prompting countries to reevaluate their economic accounts and political alliances. Indeed, many nations are redefining (or trying to do so) their geopolitical interests to adapt and be self-sustaining and stable amid complex global crises with no clear goals (and no clear consequences), identifiable or controllable. This is especially true for the so-called Arab-Islamic states community and even more so for the Arab-Persian Gulf sub-region.

Among these states, particularly, for those adhering to the bizarre (in the sense that it is unclear how it is really governed given the very deep divisions hidden behind lavish meetings and very long final communiqués) Gulf Cooperation Council (GCC), these revaluations seem to be increasingly articulated, considering current geopolitical developments. Will the alliance with the United States continue to coincide with the present and, above all, future interests of the Gulf States? How are these nations trying to diversify their alliances with emerging powers like China, Russia (and others) in the fields of security, finance and energy?

But between these two horns of dilemma is a third, very delicate one, namely the construction of a balance between US interests on the one hand and Chinese and Russian interests on the other (not counting the weight and interests of states such as Iran and Turkey)? Identifying a path to follow is of the utmost importance, for the West and for Europe, in view of the important energy capacity (the Gulf states produce 40% of the world's total energy) and consequently, enormous financial resources.

Before examining the options and choices available to these states, however, there are several key points that need to be highlighted as factors in Gulf states' assessments of their interests and alliances.

Firstly, the Gulf States do not seem to ignore the signals coming from an important strategic alliance formed by the complex of international architectures alternative to the system of Euro-Atlantic political,

economic and security architectures (like EU, NATO, G7, G20, etc.) represented by a consolidated reality like the Shanghai Cooperation Organization (SCO) which includes Russia, China, Iran, India, Pakistan, Kazakhstan, Kyrgyzstan, Uzbekistan and other various countries both as observers and as partners, including Saudi Arabia), a very robust BRI (Belt and Road Initiative) and one in progress, the BRICS (Brazil, Russia, India, China, South Africa and several others interested in join).

Similarly, the Gulf states are aware of the important role of Russia and China in controlling Iranian excesses, especially if Teheran, despite some recent declarations of goodwill (probably dictated by the need to mitigate its isolation which has grown due to the brutal repression of civil protest movements), were to replicate North Korea's nuclear scheme. Furthermore, the GCC states, despite the obvious needs, are unable to develop a common policy due to the aforementioned interstate divisions and rivalries and divergent needs.

But what is more important is that the link between the subregion and the United States, which began with the meeting between President F. D. Roosevelt and the Saudi king, Ibn Saud aboard the cruiser USS 'Quincy' in the Suez Canal in February 1945, if historically fluctuating according to the Washington administrations, in recent years it has become more unstable due to the ideological polarization of the US leadership (not to mention Trump's insulting manners towards his local interlocutors).

Finally, the repercussions of the Ukrainian war still remain unclear and unpredictable in terms of security and economics, especially with regard to global energy prices, but have shown world leaders that, compared to China, Russia increasingly looks like the junior partner of Beijing. As a result, the Gulf states, while holding the energy blackmail card to the West, are understandably reluctant to give up major oil customers, such as China, especially in the perspective that all their customers (Beijing included) are turning to less dependence on hydrocarbons, and that their infinite gains will have to be reduced.

Given the current international conditions, the GCC leadership is faced with a number of options for defining a new strategic approach in the coming years. The diversification of international partnerships seems an obligatory choice, given the current context. However, diversification is an important issue, given the GCC's ties to the US and its allies, which incidentally have significant military assets deployed in the area. The difference is whether to increase strategic cooperation with Beijing and Moscow and take on a harsh hostility from the West or maintain it, albeit at a more reduced level that allows for good business, which appears to be the only *raison d'être* for many Western countries, and maintain a

high context of economic, political and military contacts with the West.

This option could make it possible to balance geopolitical interests between the West on one side and China and Russia on the other (but up to a certain point, in the case of the Washington/Brussels confrontation, Beijing/Moscow go to extremes). If they adopt the second option, the Gulf states could become a channel of communication, understanding and balance between US, Chinese and Russian interests on various global issues, especially energy and trade.

In particular, the UAE could play an important role in this option building on the vital international role it already plays (it is precisely in March that units of the UAE land forces exercise with US Army in the United States) and also to mark the difference with the cumbersome partner that is Saudi Arabia, Qatar and Oman could also manage complex issues between the United States, China and Russia, given their long experience in complex negotiations. For example, Qatar successfully brokered a deal between the Taliban and the US in 2020 (the problem was the fragility of the Afghan government that collapsed in front of the Taliban, thanks to the corruption of Kabul political and military leadership) and Oman successfully brokered several deals between Iran and the United States, including the 2015 nuclear deal.

A Red Line

In the perspective of Washington and Brussels, the red line would be military agreements with Beijing and/or Moscow. This hypothesis, so far distant, however could be in view, after the recent agreement for the normalization of relations between Teheran and Riyadh, sponsored by China; and it is useful to remember that since 1988 Saudi Arabia has acquired Chinese Dong Feng 3 missiles (with a range of 3,000 kilometres). But those were different times and the sale did not constitute a problem, given that this type of system was not produced by Western industries and those missiles were perceived as a deterrent against Iran.

Furthermore, the cooperation between the GCC states, Russia and China should not damage the interests of the United States and EU especially in the energy fields (and also if not clearly stated, also those of Tel Aviv). The GCC should, if it were in a position to do so, assure Washington and Brussels that cooperation with Russia, or even China, does not lead to the growth of their influence in the Persian Gulf region, potentially triggering a hostile response from USA, NATO and the EU, such as the further acceleration of energy policies independent of hydrocarbons, with dire consequences for the GCC

states (and in fact to it, albeit through OPEC and OAPEC, such as Iraq).

The agreement to normalize relations between Saudi Arabia and Iran, brokered and sponsored by Beijing, seems to be the first sign of this new approach (but maybe not); at any rate since it involves the leading nation of the GCC (albeit disputed) and has vast influence and influence over other Arab-Islamic nations (with some notable exceptions).

In any case, referring to the above, despite a not particularly positive climate between Riyadh and Washington, with a timing worthy of a better cause, the Saudi crown prince MBS (Mohammed Bin Salman) announced the finalization of a massive contract for the purchase of 121 Boeing airliners for the newly formed Riyadh Air and Saudia just after the international notification of the Beijing-sponsored agreement. The contract was commented on by a warm statement from the US State Department which underlined the solidity of bilateral relations (*excusatio non petit*). The negotiations for this contract took time to be finalized, also for technical reasons, but they probably would have started some time ago would have started some time ago, probably coinciding with Beijing's first diplomatic approaches and, equally clearly, it represents an assurance that Saudi Arabia wants to give Washington and a nice injection of money for the US aeronautical industry, a symbolic and strategic axis of the USA.

Consequences?

The latest developments, such as the promise to re-establish diplomatic ties and normalize relations between Riyadh and Tehran, promoted by China, have a potentially very wide range of consequences, both regionally and in the near (and not) abroad. At first glance, the Iranian-Saudi-Chinese deal could be seen as another affront by MBS to the US. If it is, it is surely a partial aspect of the complex bilateral relations that bind the two countries. Fears of Riyadh's possible departure from Washington ties are mitigated by Saudi Arabia's continued dependence on US military capability, not to mention the flow of spare parts for the Saudi arsenal.

However, the US irritation towards Saudi Arabia on the subject of human and civil rights and for the barbaric murder of Washington Post journalist Jamal Khashoggi in 2018 remains intact. The White House, meanwhile, downplayed differences with Saudi Arabia, saying Riyadh was in close contact with Washington for conversations with Beijing and Tehran, given that the United States and Iran have no direct diplomatic contacts.

The real reason for Riyadh's agreement with Iran seems to be dictated by the increasingly urgent need

to get out of the quagmire of war in Yemen, which began in March 2015, with enormous expenses, poor results and significant damage to the image of the suffering of the civilian populations, not to mention the military humiliation of theoretically very powerful armed forces, the Saudi ones, in fact blocked by the militias of the Yemeni-Shiite-like Houthi, who have come to hit Saudi Arabia and the UAE in depth, with missiles supplied from Tehran. Furthermore, due to the aforementioned human rights problems in Saudi Arabia, Biden, with the support of Congress, ended American assistance for Saudi offensive operations in Yemen.

Also, here too enters the increasingly fierce domestic ideological political dispute in the US, where Republicans criticize Biden for pushing Riyadh closer to Beijing, saying Democrats have alienated a key Gulf partner, lost another battle in the competition against China and jeopardize the opportunities to establish ties between Saudi Arabia and Israel and the possibility of reconstituting (on different bases and adherents, obviously) the ancient alliances and understandings promoted by Washington in the 1950s in the Middle East (Baghdad Pact, CENTO, METO).

Saudi Arabia has however said that opening ties with Israel is conditional on progress towards a Palestinian state. This condition constitutes a serious problem for Netanyahu, who, with his hard hand towards the Palestinians, has put himself in a corner in this perspective, given that Saudi Arabia's accession to the anti-Iranian coalition, is seen by Israel as a strategic necessity, would unblock the expansion of this agreement almost all the states of the region, with the expected self-exclusion of Syria, Algeria, perhaps Iraq and Lebanon (in these two for the massive presence of populations of the Shiite rite), but Saudi officials have asked for guarantees for a constant flow of armaments and placing this area outside of political differences, a commitment to the defense of the kingdom and help in the construction of a civilian nuclear program.

The countries of the region, with Saudi Arabia in the lead, continue to prefer Republicans negotiating partners to Washington, both for ideological reasons (both reactionary/conservative) and economic proximity, given the proximity of the US oil industry to the Republican party and proof of this, it would suffice to observe that the Saudis, before the mid-term elections of 2022, cut oil production despite the opposition of the USA, with the aim of driving up the price, damaging the electoral chances of the Democrats and helping the Republicans.

This distrust of Democrats is ancient, originating from the attention they give to issues that the Saudis find unbearable, such as the protection of human rights, but the turning point came in 2015, when US

President Barack Obama gave the green light for a nuclear deal with Iran without consulting the Saudis. He then insinuated that Saudi Arabia is a "free rider" and argued that the situation in the Persian Gulf "requires us to tell our friends and the Iranians that they must find an effective way to share the neighborhood".

According to many observers, the Iranian-Saudi-Chinese agreement would be a "tactical affront" by Saudi Arabia towards the Biden administration, but the perturbations of relations at the political level almost never have repercussions on the military-military level and the possibilities of further slides of the countries of the region towards the purchase of Chinese weapons is low (and the Russian one is very low, given the poor results provided of the Moscow weapons systems by the war in Ukraine) and more generally, there is strong dissatisfaction with goods and services supplied by companies and Chinese, while the United States and Europe maintain an undisputed advantage with the quality of the material, after-sales services, training, education and support.

A Different View

It remains to be seen whether Saudi Arabia and Iran will keep the commitments made in their trilateral declaration signed with China, such as the reopening of their embassies and the exchange of ambassadors within two months. Saudi Arabia and Iran also agreed to implement a decades-old security cooperation agreement, first established in 1998 and expanded in 2001, and to cooperate on the economy, trade, investment, technology, science, culture, sport and youth (agreement that remained a dead letter).

A new restoration of diplomatic relations between Saudi Arabia and Iran, brokered by China, is barely enough to overcome the long-standing hostilities of these two countries. Far from representing a regional realignment, ultimately it is more likely to appear as a further sign that Beijing is trying to make inroads in international diplomacy and that in its perspective the results, if any, can be seen in the medium term.

Saudi Arabia and Iran are bitter adversaries with a centuries-old history of enmity and mistrust. On that basis they are extremely unlikely to suddenly become friendly neighbors. But it is not clear in what terms and for how long MBS will be able to validate this result. The new deal is not like the Camp David deal (which effectively ended the war between Egypt and Israel); nor is it even comparable to the wishful thinking Abraham Accords (which established relations between Israel and Arab countries that

had never joined a war against it and which Israel now hopes to extend to other participants in an anti-Iranian fashion).

Rather, the deal promises little more than a resumption of normal diplomatic ties; without more concrete steps towards reconciliation, underpinned by external guarantees and oversight, the Chinese-brokered deal could simply represent an interregnum of calm before a possible next phase of bilateral tensions, as the underlying reasons for resolving and/or remove the suspicious mortgages, mistrust and fears have not been addressed, as far as is known.

The two states have a contentious relationship history. Iran severed ties with Riyadh in 1944 after the Saudis executed an Iranian pilgrim who had accidentally desecrated a rock at the shrine in Mecca. They reconciled in 1966. But then, in 1988, the Saudis cut ties after Iranian political demonstrations during the pilgrimage to Mecca the year before left at least 402 dead. Relations were then resumed in 1991, before being suspended again in 2016, when Saudi Arabia beheaded a Shiite cleric, leading protesters to storm his embassy in Tehran.

Most of these swings have been driven by regional and global dynamics. In 1966, Egyptian President Gamal Abdel Nasser's secular and pan-Arab rhetoric prompted the Saudis to approach the enlightened dictator, Sha Reza Pahlavi (then Washington's protégé). In 1968, the exit of Great Britain from the Gulf, following the decision to suspend all military presence east of Suez, shuffled the cards. OPEC's worldwide energy blackmail following the Yom Kippur War begins to give endless financial resources to that region, further igniting pre-existing rivalries. In 1991 both countries feared Saddam Hussein's Iraq. Today there is no common threat to both countries.

The accord is more like a temporary ceasefire, one of many promoted by regional leaders and all of which ended agonizingly, such as the accord promoted by Nasser between Lebanon and the PLO in 1969, giving the Palestinians a fixed area of operations against Israel. But six years later, the Palestinians were at war with Lebanon's Christian factions, igniting the civil war between local religious-political factions and setting off repeated and deadly Israeli actions; or how in February 1994, King Hussein of Jordan brokered a deal between feuding Yemeni leaders; but by May of that year a faction had split off, causing a new civil war.

As an aspiring hegemonic and regional player, China hopes its new diplomatic clout will bolster its military power and presence in the region (and sub-region). But there is an important American military presence in the Persian Gulf. The US Navy's 5th Fleet is based in Bahrain, CENTCOM (US joint central

command which has jurisdiction and operates in an area ranging from Egypt to Afghanistan) has its advanced operational command in Qatar and Saudi Arabia itself hosts nearly 3,000 US military personnel (and a huge, but unknown, number of 'contractors').

But GCC states remain on the top of US-led interest (politically and financially). Saudi Arabia, Qatar were classified among the top 10 global arms importers from 2018 to 2022, according to a report published by the Stockholm International Peace Research Institute (SIPRI) on March of this year. Saudi Arabia was the world's second-largest arms importer during that period and received 9.6% of all arms imports, second only to India at 11%, according to SIPRI's 'Trends in International Arms Transfers 2022'. Riyadh received the 78% of its imports from the US, which included the delivery almost 100 combat aircraft, hundreds of land-attack missiles and over 20,000 guided bombs. UAE and Kuwait got the majority of their imports at 66% for the UAE and 78% for Kuwait from US as well.

After these notes, which may appear reassuring with regards to the connection, perhaps forced by Saudi Arabia (and these parameters are also transferable to the other small states of the GCC), to the political-economic and military system of the West, it is useful to recall that Riyadh, which seems to be looking for its own space, recently flatly refused to participate in the recapitalization of the collapsing Credit Suisse. The amount, which is important but not insurmountable for Saudi finances, should make us reflect on how much it can really count on a partner who seeks to silence doubts and fears by monetizing them (i.e. by signing large contracts of all kinds).

Of course, each state has its own priorities and needs, but sometimes such moves leave client states in the open, which had aligned their policies on Saudi ones, such as Morocco. Rabat in solidarity with one of its major donors, had a very hard line with Iran, recently accused of providing military assistance to POLISARIO through instructors of the Iranian Hezbollah and more recently, of giving in to the movement fighting for independence of the former Spanish Sahara, drones to attack his troops deployed on the sand wall that divides the former colony of Madrid.

Enrico Magnani, PhD is a UN officer who specializes in military history, politico-military affairs, peacekeeping and stability operations. (The opinions expressed by the author do not necessarily reflect those of the United Nations). This paper was presented at the 53rd Conference of the Consortium of the Revolutionary Era, Fort Worth, Texas, USA, 2-4 February 2023.

