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Pacts and Precautions: Gulf Security in a Time of Flux

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The security of the Gulf, a region more than ever important in the global economy, is back in the spotlight in the wake of recent events. The historical threat posed by Iran is being tempered by conciliatory diplomacy. Fear of Israel asserting an unrestrained role as regional hegemon, meanwhile, has entered security calculations everywhere. What are the safeguards available to the wealthy Arab states of the Gulf?

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The anniversary of the massive Hamas terrorist attack of 7 October 2023 invited reflection on the challenges to Middle East peace and stability as a whole. The human consequences for Israelis, Palestinians, Lebanese, Syrians, Iranians and Yemenis form the essential elements of what has happened, and of what the future holds. This is (or should be) at the heart of deep re-thinking about what comes next. Continuing resort to military violence in place of a whole-hearted search for genuine peace is guaranteed to lead to even greater disasters.

Awaiting that miracle, the focus of this short piece, however, is more classical: it looks at the security of the Arab Gulf States, a region more than ever influential in the global economy, in the wake of recent events.

From their perspective, Iran has long been the major external threat, even before the Islamic Revolution of 1979. The United States has been their preferred protector and military supplier, with some re-insurance taken out with smaller roles for Britain, France and more recently Turkey.

For the wealthy monarchies of the Gulf Cooperation Council it is not only their territory that needs to be defended. It is the perception of safety and stability that affects their ambitious investment plans. Though some are well able to finance capital investment themselves from their oil and gas income, they know that this is the easy part. What they need above all is high quality employment for their young populations, and this means ensuring the skills and opportunities that can only come from being integrated with the advanced economies of the world. For them, the post-oil future is the main driver of their national strategies.

The UAE and Saudi Arabia have taken this logic further. Both are heavily committed to being at the forefront of the AI revolution, and have formed partnerships with major Silicon Valley firms. Normally they would have hedged this by forming partnerships with Chinese tech companies. But pressures from the second Trump Administration have forced them to abandon the idea. In making this choice they (and Qatar) have also doubled down on procuring American defence systems, and in promising major investments in the US.

Binding Washington close has always been a key strategy. It was the main driver of the Abraham Accords with Israel, the country integral to US policy-making towards the Middle East. The olive branch that the UAE and Bahrain held out to Israel by signing the Accords was genuine, with the prospect of mutual economic benefit and a path towards genuine regional peace. It was also a major investment in ties with US policy-makers.

There were always risks to this approach from the uncompromising nature of Israel's policies towards the Palestinians, and its undisguised territorial ambitions in Palestine, Lebanon and Syria. Also from its unwavering hostility towards Iran. Those risks doubled with the violence of the Israeli response to the Hamas attack of 7 October, and the evidence (now formally recognised by the International Court of Justice and most countries) of the genocidal character of Israel's actions towards the Gazans, and its never denied ambition not only to prevent the establishment of a Palestinian state, but to annex the West Bank as well as the Gaza Strip.

The assault on Gaza has given unprecedented prominence to these realities, which some Western governments still prefer to ignore. But public opinion everywhere, and most strongly in the Muslim world, has risen against the injustice and inhumanity of recent Israeli actions, and reopened examination of the entire history of the Jewish State in its forceful colonisation of what had been Ottoman Palestine.

The full effects of this change have yet to be seen. One result however can already be discerned: Saudi Arabia, which had been resisting being manoeuvred into signing the Abraham Accords, can now sign a bilateral security pact with the United States free of the condition being imposed by the Biden Administration of making it a triangular arrangement with Israel. This, if it happens, will be a cornerstone of future security in the region.

Deep mistrust of Israel's ambitions and mindset extend to suspicion of the US Administration and its true intentions for Gaza, Palestine and the region as a whole. But the Administration is for now serious about making the Gaza peace plan work. The Israeli government has badly misread this by massively breaching the ceasefire, repeating the mistake it made of attacking Doha in an attempt to assassinate the Hamas negotiators.

Though President Trump personally was quick to rebuke Israel and offer reassurances to Qatar, further damage to trust in US protection had been done. While the UAE, Saudi Arabia and Qatar are vigorously strengthening their ties with the United States, it is unsurprising that some hedging of security risks is happening. Internal disputes between GCC members have been set aside. Political and security cooperation with Egypt has strengthened. Turkey has overcome some lingering mistrust to become a key security partner. Conciliatory diplomacy between the Arab Gulf States and Iran is set to continue and become a permanent feature. A long-negotiated security cooperation pact between Saudi Arabia and Pakistan has been concluded.

Perhaps the strongest security card in the hands of the Arab Gulf states, however, is the strategic dependence of a large part of the global digital economy on the safety of data transmission cables, notably in the Red Sea. The huge investments being made by the major Silicon Valley upscalers in cabling. and in data centres in the Gulf countries concerned to be powered by plentiful cheap electricity, provide a potent incentive for the United States to ensure an end to conflict in the region. This will not be easy. But Washington and its Gulf allies are well aligned, in a way that makes an increasingly threatening Israel a disruptive outlier.   The chance of genuine and lasting peace needs to be seized with the energy it deserves.

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