

The Gulf region 2022

Three scenarios

Gulf States Analytics

Preface

In 2022, much will be at stake in the Gulf sub-region. In this report, we analyze three unique scenarios that could possibly play out next year in the monarchies of the Arabian Peninsula. These various situations involve improvements in Iranian-Saudi relations, the future of the Joint Comprehensive Plan of Action (JCPOA), and the risks of Afghanistan's chaotic instability spilling into the Gulf both directly and indirectly.

Scenario 1: JCPOA talks fail to revive the 2015 nuclear accord

Geographic realities give the six Gulf Cooperation Council (GCC) member-states high stakes in the outcome of nuclear brinkmanship between the US and Iran. Amid the ongoing uncertainty over the future of the Joint Comprehensive Plan of Action (JCPOA), commonly referred to as the Iranian nuclear deal, there are serious dilemmas that Arab Gulf monarchies must consider when contemplating the JCPOA's status. At this juncture, GCC states are preparing for future scenarios whereby talks in Vienna fail to revive the nuclear accord which the Trump administration unilaterally withdrew from in May 2018.¹

Although the different GCC states have their unique perspectives on Iran-related issues, including the JCPOA, there will be a general view in the Gulf that engaging Iran should continue regardless of the nuclear deal's fate. In fact, this view has strengthened considerably because of the uncertainties over the longer-term reliability of the US partnership, which has heightened awareness in Gulf capitals that they cannot automatically rely upon US support come what may. Additionally, there is a belief that even if the JCPOA is reconstituted via negotiations in Vienna, the GCC states and Iran should engage in follow-up talks to resolve non-nuclear issues that have fueled tension between Arab Gulf monarchies and the Islamic Republic.

Throughout 2021, analysts have grown increasingly pessimistic about the prospects for a JCPOA revival. One factor has been the election of hardliner Ebrahim Raisi in the Iranian presidential election in June 2021. With a new administration in power in Tehran, the dynamics vis-à-vis the nuclear accord have shifted. This is not to say that Raisi would not like the JCPOA reconstituted. But he and those in his inner circle will be less willing than the previous administration to make concessions to the US amid nuclear talks, especially since doing so would likely damage them politically within the Islamic Republic. At least it is safe to say that any concessions from Iran will probably come at a slower rate now that hardliners have essentially taken full control of the Iranian state.²

Another factor is the Biden administration's inability to assuage Iranian concerns about the US ending its commitment to the 2015 deal in the post-Biden era. Given how much the accord has become a partisan issue in Washington, such concerns are valid. Officials in Tehran are justifiably nervous about making concessions on their side to revive the JCPOA if a Republican president enters the Oval Office in January 2025 only to trash the accord as did Trump in 2018. One way to overcome this would be for the Senate to ratify the JCPOA as a treaty; for example, as it did the United Nations Framework Convention on Climate Change in 1992. However, this would require the support of 67 Senators, which is unrealistic, and so even a revived US commitment to the JCPOA would leave it vulnerable if the Biden administration, like the Obama administration, classified it 'merely' as a nonbinding political commitment.

¹ <https://www.nytimes.com/2018/05/08/world/middleeast/trump-iran-nuclear-deal.html>

² <https://www.cbsnews.com/news/iran-nuclear-deal-will-raisi-resume-talks-on-jcpoa-with-us/>

Within this context, what is more likely is a less-for-less approach in which Iran makes smaller and more short-term concessions and the US provides Tehran with smaller degrees of sanctions relief than what would be feasible with the accord being fully salvaged.³ With each passing day, the window of opportunity is narrowing as the US is moving closer to the eventual post-Biden era, which could begin politically as early as November 2022 should the Republicans gain control of the House of Representatives and/or the Senate. This means that any short-term deal which could benefit Iran would be guaranteed for an increasingly shorter span of time, decreasing Tehran's incentives to negotiate a revival of the JCPOA.

Regardless of how talks unfold in Vienna and whether the JCPOA can be saved, GCC states will have different reactions, which is consistent with the post-1979 history of Arab Gulf monarchies lacking any consensus towards the Islamic Republic. Threat perceptions of Iran vary from one GCC member to the other especially over whether Iran is seen as an internal or external threat. Although no GCC state welcomes Tehran's sponsorship of militant Shi'a groups in the Middle East such as Lebanese Hezbollah and the Fatemiyoun Brigade, Arab Gulf governments are divided in terms of their strategies and tactics for addressing the alleged Iranian threat.

On one side there is Kuwait, Oman, and Qatar. These Arab Gulf monarchies view Iran mostly through a commercial set of lenses. Kuwait City, Muscat, and Doha tend to understand the most "malign" aspects of Tehran's foreign policy as mostly a regional (not so much an internal) challenge, although Kuwait does have a sizeable Shi'a community which is nevertheless far better integrated than their counterparts in Bahrain and Saudi Arabia. In Oman and Qatar's cases, the ruling governments have never had any serious problems with their country's Shi'a minorities, and Kuwait's Shi'a citizens have been tolerated and have lived in harmony with their Sunni counterparts since the Iraqi occupation (during which they proved their loyalty by forming the bedrock for local resistance movements, following the chaotic years of the 1980s when the Iranian Revolution and the Iran-Iraq War increased Kuwait's sectarian temperatures).

The inclusion of Kuwaiti, Omani, and Qatari Shi'a into their countries' political and economic systems have made these GCC states far less vulnerable to any potential sectarian meddling by their Persian neighbor to the East. This factor contributes to their view of the Iranian regime as not posing any threat from within.

Furthermore, economic opportunities for the Arabian sheikdoms would open with the unfreezing of Iran's relations with the global economy. Kuwait, Oman, and Qatar would be keen to capitalize on such a scenario under the JCPOA's possible revival. In terms of security, the JCPOA is the most realistic path to peaceful resolution of the standoff over Iran's nuclear program according to conventional wisdom in Kuwait City, Muscat, and Doha. These three GCC members strongly supported the Obama administration's efforts to negotiate the nuclear accord. Although they avoided directly criticizing the Trump administration in May 2018, they did not join the three other members of the Council in praising the US for withdrawing from the historic 2015 accord.

These three GCC states, which strive for a workable geopolitical balance between Saudi Arabia and Iran, have unique interests at stake when it comes to their relations with Tehran. For Kuwait, good relations between its different communities (including the Shi'a minority) contributes to its desire to maintain a healthy relationship with Iran.⁴ Oman and Iran have historical ties—strengthened by the Shah of Iran's support for Sultan Qaboos amid the Dhofar Rebellion during the 1970s—and the two countries share ownership of the Strait of Hormuz.⁵ Muscat has long seen Iran as a regional force that can help Oman maintain greater autonomy from Riyadh, which the smaller GCC states have worried about given Saudi Arabia's history of not always respecting the sovereignty of its Arab Gulf neighbors.⁶ Qatar and Iran share the world's largest natural gas field—South Pars/North Dome, which is largely responsible for Doha's prosperity and naturally gives Qatari officials incentive to maintain healthy, respectful, and working relations with Tehran to be pragmatic, even if Doha objects to aspects of Iran's foreign policy such as supporting the Syrian government and Yemen's Houthi rebels.⁷

However, Bahrain, Saudi Arabia, and the UAE (specifically Abu Dhabi, not Dubai) see Iran through a specific prism that is oriented around constant security dilemmas. To these countries' leaders, the Islamic Republic is a predatory state which must be countered by Arab states and others in the international community, most importantly the United States. Historically, officials in Manama and Riyadh have also

³ <https://www.reuters.com/world/middle-east/despite-talk-options-iran-us-has-few-good-ones-2021-07-15/>

⁴ https://ecfr.eu/special/battle_lines/qatar_regional

⁵ <https://foreignpolicy.com/2020/01/16/sultan-qaboos-oman-loves-iran-shah/>

⁶ https://ecfr.eu/article/commentary_oman_between_iran_and_a_hard_place1/

⁷ <https://www.aljazeera.com/economy/2017/6/15/qatar-iran-ties-sharing-the-worlds-largest-gas-field>

seen post-1979 Iran as a threat to internal security by dint of perceived Iranian 'meddling' with the loyalties of their domestic Shi'a communities. These Gulf monarchies viewed the Trump administration's "maximum pressure" agenda favorably, despite their understandable concerns about the anti-Iranian campaign spiraling out of control.

Today officials in Abu Dhabi, Manama, and Riyadh share concerns about a possible JCPOA revival. Their fears are that the nuclear accord being salvaged would embolden Tehran in terms of its regional foreign policy, particularly with respect to its arming and financing of non-state actors in Arab states like Iraq and Yemen and ballistic missile activity. The easing of sanctions would give Iran's economy a major boost, strengthening the government-to-citizen social contract inside the Islamic Republic while making the leadership more confident abroad, according to those most concerned about the JCPOA's potential revival later this year or in 2022.

To be sure, no GCC member wants to see a new war erupt in the Persian Gulf, especially if it entailed Iranian attacks against GCC states as revenge for their (outright or implied) support for possible US and/or Israeli military action against the Islamic Republic. That said, officials in Abu Dhabi, Manama, and Riyadh would be more supportive of US policies that maintain pressure on Iran and force the country into staying in relative isolation. The GCC members which take a more moderate and pragmatic stance on Iran—Kuwait, Oman, and Qatar—would see a continuation of such US pressure (sanctions, military threats, etc.) as increasing the risks of a military confrontation in the first place, thus giving them ample reason to facilitate any development that can lower the temperatures in US-Iran relations.

In any event, all the GCC states (except for Bahrain) have recently indicated a desire to engage Tehran more deeply irrespective of the JCPOA's fate. The key difference among the monarchies of the Arabian Peninsula is between those which would like to negotiate with the Iranians while they are under Washington's pressure and those which believe such pressure being lifted would make them safer. Regardless of what transpires in Vienna, it is safe to bet that Iran-related issues such as the nuclear accord will continue to expose major fault lines within the GCC.

Scenario 2: Saudi Arabia and Iran restore official diplomatic relations

Since Iran and Saudi Arabia sent delegations to Baghdad for direct talks that commenced in April 2021, tensions in Tehran-Riyadh relations have, to some degree, de-escalated. Current circumstances in Iran, Saudi Arabia, and the region indicate that Tehran and Riyadh could possibly restore diplomatic relations in 2022, if not sooner. However, given the distrust between the two sides and all the sensitive conflicts in West Asia pitting their agendas and interests against each other, an Iranian-Saudi rapprochement is highly unlikely for the foreseeable future.

Even the analysts most optimistic about Iranian-Saudi reconciliation agree that it will be difficult for the two powers to overcome all their issues. Much bitterness and hatred in Iranian-Saudi relations have played out destructively in many parts of the Middle East from Iraq to Lebanon and Yemen to Syria, especially in the post-Arab Spring period. For decades, powerful ideological tensions and at times outright hostility have shaped bilateral ties. Although it is misguided to oversimplify the friction in Iranian-Saudi relations by attributing it to the Shi'a-Sunni divide in Islam, sectarian factors – and political decisions in both capitals to deploy sectarian tactics – have undoubtedly contributed to severe tensions in relations between these two countries.

Iran's claims to be a protector of oppressed Shi'a Arabs in countries such as Saudi Arabia and Bahrain have made numerous regimes in the Arab region view Tehran as guilty of meddling in the internal affairs of other countries through sectarian narratives and agendas. Likewise, in Iran's restive border provinces where minority groups have grievances against the Iranian state, such as Khuzestan, officials in Tehran accuse Saudi Arabia of sponsoring various separatist forces.

While 1979 did not mark the start of tension between Tehran and Riyadh, the ascendancy of Islamist factions in the Iranian revolution of that year marked the beginning of Saudi Arabia perceiving its neighbor to the northeast as a hostile and predatory threat. Throughout the Persian Gulf, geo-sectarian temperatures rose in the 1980s amid the Iran-Iraq war (1980-1988) – in which Riyadh supported Baghdad against Tehran – and episodes with the annual Hajj that ignited more friction between Saudi Arabia and

Iran.⁸ Beginning in the 1980s, the Saudis have been accusing the Iranians of sponsoring restive forces in their country's oil-rich Eastern Province and in neighboring Bahrain.

Bilateral relations remained negative in the 1990s, although they did thaw somewhat after the election of Iran's President Mohammad Khatami in 1997 and the signing of a Saudi-Iranian security agreement in 2001.⁹ Then the fall of Saddam Hussein's government in 2003 resulted in Saudi Arabia having major (and in hindsight very valid) concerns about Iranian influence expanding and consolidating across Iraq.

Since 2011, the "Arab Spring" uprisings, subsequent civil wars in Syria and Yemen, and the crackdown on dissent in Bahrain, have added new and complicated dimensions to the Iranian-Saudi rivalry, which has played out across numerous Arab states over the past decade in highly destabilizing manners. Especially in Bahrain, but also in the Eastern Province of Saudi Arabia, blaming the disturbances on external (i.e. Iranian) 'meddling' served to deflect away from the root causes of political and economic grievance by externalizing their origins.

By January 2016, Riyadh severed diplomatic relations with Tehran following Sheikh Nimr Baqir al-Nimr's execution and the subsequent violence waged against Saudi diplomatic missions in Tehran and Mashhad – one of the tensest moments in the history of Iranian-Saudi relations this century. In May 2017, then-Deputy Crown Prince MbS said there was no room for dialogue with Iran and that any confrontation between his country and the Islamic Republic would occur "inside Iran, not in Saudi Arabia."¹⁰ By March 2018 tensions between the two Persian Gulf states only heated up after the now Crown Prince compared Iran's Supreme Leader Ayatollah Ali Khamenei to Adolf Hitler, promising that Saudi Arabia would develop a nuclear weapon "as soon as possible" if the Iranians did so.¹¹ The Foreign Ministry in Iran responded by calling MbS a delusional novice with "no idea of politics".¹²

The Trump presidency, which began one year after Saudi Arabia severed diplomatic ties with Iran, gave Riyadh further incentive to conduct a muscular foreign policy directed against Tehran. Throughout Trump's time in the Oval Office, the US administration went to pains to support Saudi Arabia. At least initially, Trump's anti-Iranian campaign of "maximum pressure" left Saudi officialdom confident of strong US support for the kingdom in the face of the perceived threat posed by the Islamic Republic. The Trump presidency, from the Saudi perspective, was useful in terms of 'making up' for the perceived flaws in Obama's approach to Iran, which led to the JCPOA – a deal the Saudis only gave lukewarm support to and were content to see Trump pull the US out of in May 2018.¹³

But the missile and drone attacks against Saudi Aramco facilities in September 2019 changed everything and forced Riyadh to view both the idea of engaging Iran and the kingdom's dependence on Washington differently. These unprecedented attacks against key energy infrastructure exposed the Saudi economy's vulnerability to Iran-aligned forces in the region. The lack of any response from the US beyond rhetoric demonstrated to the Saudi leadership how even with Trump in the White House, the kingdom still had to call into further question the reliability of Washington as a security guarantor against Iran. That episode prompted Saudi Arabia to begin outreach to Tehran almost immediately via intermediaries, and to call for regional de-escalation after US-Iran tensions soared following the January 2020 killing of Qassim Soleimani in Iraq.

The Biden presidency only further contributed to Saudi consideration of all the benefits that could come with closer ties with Iran and a lowering of the tensions built up between Riyadh and Tehran. Although Biden's administration has not treated the Saudi Crown Prince or the kingdom as a "pariah", which the president promised to do as a candidate in November 2019, the view in Riyadh at the time of the 2020 US presidential election was that a Biden win would make the US less supportive of Saudi Arabia's regional foreign policy.¹⁴

The concerns in Riyadh were that Biden's administration would put more pressure on the Saudi government with respect to human rights, causing new frictions to emerge between the Kingdom and the White House. The grander issue of Biden's push to reorient the center of gravity in US foreign policy from the Middle East toward the Indo-Pacific to counter China's rise is a critical factor contributing to

⁸ <https://www.brookings.edu/blog/markaz/2016/09/12/groundhog-day-in-mecca-another-year-another-escalation-of-saudi-iranian-tensions/>

⁹ <https://www.arabnews.com/node/211187>

¹⁰ <https://www.reuters.com/article/us-saudi-prince-iran/powerful-saudi-prince-sees-no-chance-for-dialogue-with-iran-idUSKBN17Y1FK>

¹¹ <https://www.bbc.com/news/world-middle-east-43419673>

¹² <https://www.nytimes.com/2018/03/15/world/middleeast/mohammed-bin-salman-iran-hitler.html>

¹³ <https://www.saudiembassy.net/news/kingdom-saudi-arabias-statement-united-states-withdrawal-jcpoa>

¹⁴ <https://www.washingtonpost.com/politics/2019/11/21/transcript-november-democratic-debate/>

Saudi Arabia's view that it must prepare for a post-US order in the Gulf. Within this context, the Saudi leadership believes it best serves Riyadh's interests to open dialogue with Iran, along with other states in the Middle East including Syria, Qatar, and Turkey while also diversifying its global alliances by strengthening ties with China, India, and Russia.

Shortly after Biden entered the Oval Office, a new tone came from MbS regarding Iran-related issues. No longer was he comparing Iran's Supreme Leader to Hitler, speaking bluntly about a confrontation with Iran, or claiming that there was no opportunity for dialogue with the Tehran regime. To the contrary, by April 2021, the Crown Prince said that the Saudis are "seeking to have good relations with Iran" in an interview with Saudi television.¹⁵ "We are working with our partners in the region to overcome our differences with Iran."¹⁶ That same month, another major development in the Iranian-Saudi relationship unfolded.

In April 2021, the two countries began talks which were taking place parallel to the nuclear talks in Vienna between Tehran and the P5+1 members (all five permanent members of the UN Security Council plus Germany). Between that point and the beginning of Ebrahim Raisi's presidency in August, the Iranians and Saudis held three rounds of talks in Iraq.

At the time of the presidential election in June 2021, Dr. Sanam Vakil, Deputy Director of the Middle East and North Africa programme at Chatham House, told one of these authors that "the [Arab Gulf] states see a Raisi victory as a potentially positive outcome."¹⁷ She explained that "unlike Rouhani, [GCC states] see Raisi, who is close to the Supreme Leader and the security and intelligence apparatus, as being able to deliver on regional compromises."¹⁸ Ultimately, this means that "this changed view will enable both sides to build on the current dialogue underway in Baghdad."¹⁹

Indeed, the new administration in Tehran quickly made a diplomatic outreach to Riyadh. President Raisi took advantage of the chance to address his country's relations with Saudi Arabia in his first press conference as president-elect on 5 August. Delivering his address before Iran's parliament, he stated that no barriers stand in the way of Iran and Saudi Arabia's embassies reopening in Tehran and Riyadh. His foreign policy message was that the Islamic Republic is keen to improve relations with those who permanently share the region with Iran.

However, some analysts did not interpret his 5 August inaugural address as grounds for expecting any improvements in relations between Tehran and Riyadh. "When Raisi was talking in his speech about expanding and strengthening relations in the region, he was talking about the proxies and not, let's say, to Saudi Arabia, the United Arab Emirates and other Sunni-led powerhouses in the region," said Rasool Nafisi, a US-based academic and Middle East expert.²⁰ "As I listened to the speech, Raisi emphasized several times that he will not negotiate directly with the United States. If he does not want to sort out Iran's problem with the US, then the chances of establishing good relations with Saudi Arabia and UAE are next to nothing."²¹

Regardless of the chances of a détente in Iranian-Saudi relations, the Islamic Republic certainly has incentives to ease friction with Saudi Arabia and bring this bilateral relationship into a new chapter. If the two countries can move past periods of hostility and begin forming a working relationship while reducing tension between them, that would significantly decrease Iran's relative isolation in the region. This is in line with Raisi's foreign policy vision for the Islamic Republic, and those of many Iranian hardliners in his camp. Their conviction is that Tehran can survive with or without the JCPOA. Their priority is not reviving the 2015 nuclear accord. Instead, Raisi and his political allies believe that Iran must prioritize better economic and diplomatic relations with regional states, including Saudi Arabia, without investing in any efforts to improve relations with the US.

The start of Biden's presidency has also been a factor in Iran's quest to smooth over relations with Riyadh. Officials in Tehran understand that their country's relationship with Saudi Arabia improving would lead to the Iranians earning some goodwill with the Biden administration amid a period in which the nuclear talks in Vienna are stalled. "...[Iran] may believe that an outreach to Saudi Arabia might improve its image regionally and internationally," wrote Gregory Aftandilian, a Nonresident Fellow at Arab Center

¹⁵ <https://foreignpolicy.com/2021/04/29/saudi-arabia-iran-uae-mohammed-bin-salman-secret-talks-biden-withdrawal-pivot-middle-east/>

¹⁶ Ibid.

¹⁷ <https://english.alaraby.co.uk/analysis/could-raisi-be-good-iranian-saudi-relations>

¹⁸ Ibid.

¹⁹ Ibid.

²⁰ <https://www.voanews.com/a/middle-east-voa-news-iran-irans-new-president-pledges-diplomacy-lift-us-sanctions/6209234.html>

²¹ Ibid.

Washington DC and a Senior Professorial Lecturer at American University.²² “That, in turn, may put pressure on the United States to remove most of the sanctions, even in the absence of a return to the 2015 nuclear deal.”²³

The Iranians also have some good reason to feel that the time is opportune for negotiating with the Saudis on regional files due to their sense of confidence throughout various areas of the Middle East where Tehran has been involved. It is not difficult to persuasively argue that in Syria, Yemen, Iraq, and Lebanon, it is forces backed by Iran (not Saudi Arabia) which have the most power on the ground.

There are obstacles to a better Iranian-Saudi relationship that must be considered. To begin, in Yemen, where many analysts believe there is a low hanging fruit for the process of advancing a *détente* between these two countries, there could be misperceptions about what each side can deliver as well as a mismatch of priorities with Yemen being a high priority for the Saudis and a far lower one for the Iranians. It is reasonable to worry that Saudi Arabia’s expectations for Iran’s ability to influence, let alone dictate terms to, the Houthis are too high. Put simply, even if officials from Tehran would vow to put pressure on the Ansurallah militia to cease its hostilities against Saudi Arabia, it is unclear whether the Houthi rebellion would abide or continue pursuing its military objectives on the ground. Although the Islamic Republic, more than any government worldwide, has influence over the Houthis, it is an oversimplification to conclude that the rebels are Iran’s “proxy” or that they are without any agency.

Therefore, there could be disappointment in Riyadh and other GCC capitals if Iran, either due to unwillingness or inabilities, does not rein in Houthi militancy in Yemen. If that were the circumstance, such a development could add perceived credibility to arguments put forth by anti-Iran hawks who maintain that engaging Tehran serves no productive purpose.

There is a desire in some other GCC capitals to lure Iraq and Syria back to the Arab world’s diplomatic fold and away from Iran’s orbit of influence. Yet the Saudis successfully negotiating a withdrawal or disarming of Iranian-backed militias in either country is difficult to imagine. The presence of powerful non-state actors in Iraq and Syria such as Kata’ib Hezbollah, Asa’ib Ahl al-Haq, Fatemiyoun Brigade, and Zainebiyoun Division constitute important foundations for Iran’s overall approach to security in the Middle East. It is highly unlikely that the Iranians would be willing to fundamentally change their relationship with these forces, at least in the foreseeable future, given how important they are to Tehran’s strategic posture in the Arab region.

Nonetheless, these obstacles to an Iranian-Saudi *détente* are not insurmountable. Although these challenges and difficulties cannot be overcome instantly, if officials from both Tehran and Riyadh can prove to be flexible and patient, there are reasons to hope that dialogue between Iran and Saudi Arabia can result in these two regional powers finding ways to mitigate their tensions and avoid an escalation of hostilities.

The geopolitical implications of an easing of tensions between Tehran and Riyadh could be felt in many different areas in the Middle East. One country in the region which would not favor any major improvements in Iranian-Saudi relations is Israel. A major factor contributing to the Jewish state’s informal relationship with Saudi Arabia and formal ties with Bahrain and the UAE is a shared view of Iran as a major threat. Any *détente* between Iran and Saudi Arabia, however, would lower the chances of Riyadh entering the Abraham Accords and could potentially become another point of divergence between Riyadh and Abu Dhabi. That said, countries such as Iraq, Oman, and Qatar, which have all worked to maintain positive relations with both Saudi Arabia and Iran would welcome improvements in Iranian-Saudi relations that could help lower temperatures in the Gulf.

Scenario 3: Instability in Afghanistan spills into the Gulf

The future of Afghanistan is highly uncertain. It is unclear whether the “Taliban 2.0” will successfully consolidate its power and/or be able to exercise control over the whole of Afghanistan and govern in any form of national (rather than Taliban) interest. Another unknown variable is how powerful the anti-Taliban resistance will become and the extent to which it threatens the new regime in Kabul. At the same time, without any countries recognizing the “Taliban 2.0” as a legitimate government, it is unclear if/when foreign powers will formalize diplomatic relations with the new Afghan administration.

There are valid concerns that Afghanistan will once again become a haven for terrorist groups, as the country was in the 1996-2001 period. Also, the potential for another Afghan civil war to erupt and be

²² <https://arabcenterdc.org/resource/a-saudi-iranian-rapprochement-still-has-a-long-way-to-go/>

²³ Ibid.

fought along ethnic and religious lines is real. These two possible outcomes of the US/NATO withdrawal and the Taliban's return to power over the summer of 2021 represent grave threats to the stability and security of all countries neighboring Afghanistan, as well as some which are further away. The risks of Afghanistan becoming a safe haven for ISIS-K and al-Qaeda and/or falling into a civil war unsettle GCC members which share vested interests in the conflict-ridden country stabilizing and being ruled by a moderate and tolerant regime.

Throughout the foreseeable future, Afghanistan will likely remain a chaotic country. In 2022, Gulf states will need to prepare for the possibilities of the country's violence spilling into the Gulf even though no GCC member borders Afghanistan. There are several ways in which exacerbation of violence in Afghanistan could have a destabilizing impact in the Arabian Peninsula.

First, terrorist organizations such as ISIS-K and al-Qaeda consider the rulers of GCC states to be their enemies, highlighted by various ISIS attacks in Kuwait and Saudi Arabia during 2014/2015, and al-Qaeda's 2003-2006 insurgency in Saudi Arabia.²⁴ This is to say nothing of Osama bin Laden's 23 February 1998 "fatwa" which decried the presence of western military forces on Saudi soil and called on Muslims worldwide "to comply with God's order to kill the Americans and plunder their money wherever and whenever they find it...[and] to launch the raid on Satan's U.S. troops and the devil's supporters allying with them, and to displace those who are behind them so that they may learn a lesson."²⁵ Naturally, the GCC states are nervous about how Afghanistan becoming a haven for ISIS-K and al-Qaeda would directly and indirectly threaten Gulf security.

After the so-called "Caliphate" seized power of large parts of Iraq, Syria, and Libya in 2014/2015, Gulf states witnessed scores of their own citizens joining ranks with ISIS in these countries. In fact, the successor to be the caliph was a Bahraini national, Turki al-Binali, who died from an airstrike in 2017.²⁶ Even among radicalized segments of Arab Gulf countries who never left the Gulf, the ISIS ideology and cause gained support through the internet and other ways of spreading hateful propaganda. If ISIS-K attracts GCC nationals to its ranks, it would be understandable for governments and societies in the Gulf to fear the possibility of such violent extremists making Arabian monarchies their future targets.

Second, refugee flows out of Afghanistan are a major concern for authorities in GCC countries. Officials in the Saudi kingdom must contend with domestic opposition to the country accepting high numbers of Afghan refugees. For the most part, Afghan refugees do not speak Arabic nor English and they lack the skills necessary for making any meaningful contribution to Vision 2030. Security factors also inform Saudi Arabia and other GCC members' perspectives on the effects of Afghan refugee crisis. The Gulf monarchies do not want radicalized Afghans affiliated with ISIS or al-Qaeda entering their countries. As the Atlantic Council's Kirsten Fontenrose explained, "Riyadh was confused by the US request for it to accept Afghans for processing before taking them to the United States, and officials have wondered why they were expected to allow in Afghans who were not sufficiently security-vetted if the United States would not."²⁷

Third, just as GCC states have had major concerns about the expansion and consolidation of Iranian influence through Shi'a paramilitary power in the Arab region, Tehran pursuing any agendas aimed at growing the Islamic Republic's clout in Afghanistan would raise concerns in the Gulf. "In the case of Iran, the Biden administration's determination to return to the nuclear deal – abrogated by former US President Donald Trump – has caused alarm in Gulf capitals that they may soon face a stronger Tehran empowered by money from sanctions relief," explained Rupert Stone, an Istanbul-based freelance journalist, who argued that this factor "gives [Saudi Arabia and other GCC states] an incentive to chip away at Iranian influence in Afghanistan."²⁸ Even though GCC members have tended not to view Afghanistan as being necessarily so critical to either Gulf security or the rivalries between GCC states and Tehran throughout the post-1979 period, a stronger Iranian hand in the conflict-ridden West Asian country would unsettle officialdom in some Arabian monarchies.

The Fatemiyoun Brigade is an Iranian-sponsored Afghan Shi'a militia with roots in the Iran-Iraq War (1980-1988) and the Afghan-Soviet war (1979-1989) that became officially established amid the Syrian crisis (2011-present) when the Islamic Republic deployed the force to fight ISIS and other anti-regime forces. The militia, frequently labeled an Iranian "proxy", made considerable contributions to the government of Bashar al-Assad's essential military victory in the Syrian civil war, underscored by the Fatemiyoun

²⁴ <https://www.bbc.com/news/world-middle-east-33287136>, <https://www.ft.com/content/dd13aaa2-008f-11e5-b91e-00144feabdc0>

²⁵ <https://jamestown.org/wp-content/uploads/2006/05/jamestown-SaudiOil.pdf>

²⁶ <https://www.cnn.com/2017/06/01/middleeast/top-isis-figure-killed-in-syria/index.html>

²⁷ <https://www.atlanticcouncil.org/blogs/new-atlanticist/what-the-arab-gulf-is-thinking-after-the-afghanistan-withdrawal/>

²⁸ <https://www.middleeasteye.net/opinion/afghanistan-saudi-arabia-qatar-iran-taliban-vie-influence>

Brigade's fighting in Aleppo, Damascus, Idlib, Palmyra, Hama, and other parts of Syria, where many of the organization's members were killed as cannon fodder to reduce Iranian casualties in Syria. Today the 64,000-dollar question is whether Iran will deploy the Fatemiyoun Brigade to Afghanistan to combat forces of Sunni extremism, especially those threatening the country's Hazara/Shi'a population or Iran's own security.

Saudi Arabia and other GCC members, which view Iran's foreign policy in the Arab region as sectarian, aggressive, and destabilizing, have extremely negative perceptions of the conduct of militias like the Fatemiyoun Brigade. Such non-state actors represent the true face of post-1979 Iran's agenda in the wider Islamic world, according to many GCC officials. If Tehran deploys the Fatemiyoun Brigade to Afghanistan in 2022, if not sooner, there would be good reason to expect the Saudis and Emiratis to become only more concerned about the West Asian country's future.

As GCC states face myriad security and geopolitical challenges stemming from the chaos in Afghanistan, the most sensitive diplomatic question vis-à-vis Kabul is whether regional states such as Saudi Arabia, the UAE, and Qatar should recognize the Islamic Emirate of Afghanistan as a legitimate government. For now, the Arab Gulf monarchies – like all governments worldwide – have refrained from recognizing the “Taliban 2.0” since the resurgent Islamist group took control of Kabul and virtually all of Afghanistan in August 2021. It is unclear whether GCC states will formalize relations with the new government in Kabul in 2022. The decisions which Arab Gulf governments will make about this recognition question will be largely tied to how the Taliban conducts itself in the upcoming future as well as how the international community approaches the new Kabul regime.

At this juncture, any GCC state establishing formalized ties with the Taliban, which Saudi Arabia and the UAE had in the 1990s, would be controversial and widely condemned by many in the international community. China and Russia along with influential powers in the Islamic world (Iran, Turkey, etc.) have made it clear that they are in no rush to recognize the Taliban's legitimacy and that that step would only be made after the new Kabul regime backs up its rhetoric about inclusivity, moderation, and tolerance. The current position of GCC states, Turkey, and Iran is that the “Taliban 2.0” has thus far failed on these fronts and is therefore unworthy of recognition.

However, two major factors could lead to GCC states normalizing relations with the “Taliban 2.0” in 2022 even if it maintains an extremely poor human rights record.

First is ISIS-K. Put simply, states in the region will want to have a partner in Afghanistan for counter-terrorism purposes, especially if the ISIS-K threat intensifies in 2022. Within this context, the Taliban may have significant amounts of luck in terms of telling the wider region that combatting ISIS-K and countering the threat which it represents require working the de facto Afghan government. What will matter significantly is the extent to which the Taliban regime can successfully sell itself as a reliable partner in the struggle against extremist organizations such as ISIS-K.

Second would be the Taliban consolidating its power in 2022. While regimes that come to power in ways deemed illegitimate by the global community (such as the current government in Kabul) may not receive international recognition shortly after taking control of their country, their ability to make their rule a long-lasting reality pushes them toward being legitimized eventually by foreign governments. Put simply, if Afghanistan's new rulers consolidate their hold on the country, it is possible that GCC states will come to terms with that reality, even if unwelcome in the Gulf, and embrace the inevitable. However, that point could possibly come many years after 2022. After all, four out of six of the GCC members (Bahrain, Kuwait, Oman, and Qatar) never recognized the “Taliban 1.0” even after it had been governing Afghanistan for a five-year-period.

In any event, while GCC members will deal with the Taliban carefully, pragmatically, and largely bilaterally rather than through the GCC Secretariat. The whole situation in Afghanistan and its countless uncertainties will leave Arabian monarchies nervous. The potential for chaos to spill over from Afghanistan into other countries will alarm officials in Gulf states who will see the crises in Afghanistan largely through the prisms of terrorism and refugee concerns. Officials in Doha will be following especially closely for any sign that the more ‘moderate’ wing of the Taliban which had been based in Qatar prior to 2021 may be losing out in factional struggles with hardliners who remained on the frontlines in Afghanistan throughout the years of US/NATO occupation, just as, in Yemen, similar struggles have pitted externally-focused ‘moderates’ based in Oman against battle-hardened militants in the Houthi leadership in Sana'a.

Gulf State Analytics (GSA) is a Washington, DC-based geopolitical risk consulting firm which assesses risks and opportunities among Gulf Cooperation Council (GCC) states for lenders, traders, investors, policymakers, and other parties. <https://gulfstateanalytics.com/>

Disclaimer

The views and opinions expressed in this article are those of the author and do not necessarily reflect the beliefs and positions of the Regional Program of the Gulf States at Konrad- Adenauer-Stiftung.

Contact Konrad-Adenauer-Stiftung e.V.

Regional Programme Gulf States

Fabian Blumberg
Representative to the Gulf States
Email: fabian.blumberg@kas.de

Dr. Mohammad Yaghi
Research Fellow and Programme Manager
Email: mohammad.yaghi@kas.de

<https://www.kas.de/rpg>