



Issue brief Great-power competition in the Gulf

Written by
Jonathan Fulton



Bottom lines up front

As the unipolar moment ends, Gulf leaders have an unusual opportunity to shape their own region, with preferences for stability and economic development.

Though interests, not ideology, drive Gulf states' partnerships, Gulf leaders have shown they value the predictability that a rules-based international order creates.

De-escalating the region's longstanding tensions remains the Gulf priority it was pre-October 7, 2023.

■ The future of the global order

It has become accepted wisdom that we have entered a multipolar world. Political and business leaders, pundits, and academics frequently use this multipolarity as a starting point to describe the current churn in which we find ourselves. This, however, is really an unsatisfying explanation of the global order. As Jo Inge Bekkevold pointed out in *Foreign Policy*, "Polarity simply refers to the number of great powers in the international system—and for the world to be multipolar, there have to be three or more such powers. Today, there are only two countries with the economic size, military might, and global leverage to constitute a pole: the United States and China." Even this is contentious; China absolutely has global interests, and increasingly a global presence, but whether it has global power is debatable. In his influential 2013 book, *China Goes Global: The Partial Power*, leading

China expert David Shambaugh described the country's global footprint as broad but shallow across most indicators of power—including global governance and diplomatic, economic, military, and cultural power. His assessment of China as a trading superpower but a regional power in most other areas, which looked unlikely to last when the book was published, has become only more prescient after more than a decade of Xi Jinping's rule. Despite a more expansive global presence via the Belt and Road Initiative (BRI) and a wide range of regional forums meant to facilitate cooperation and coordination with Beijing, China's influence and power have yet to meet expectations.

In reality, the United States remains the only true pole in the international order, although the Donald Trump administration has channeled popular frustration with this global leadership among US voters, many of whom have come to reject the burden

of global leadership. While the Democrats appear to still position themselves as “responsible stakeholders” in the liberal international order, the Republican consensus is centered on Trump’s “Make America Great Again” (MAGA) doctrine, with an inward focus that rejects a larger international presence. Those foreign policy objectives that are prioritized under MAGA seem to constitute a “fortress America” approach, explaining the Trump administration’s targeting of Greenland, Canada, and Panama, as well as its aggression toward Venezuela. Despite this recalibration, the United States still has a global security architecture and a system of alliances that allow it to project power around the world in a way that no other country can match, and a return to a traditional foreign policy under a Democratic administration after the 2028 general election is a possibility.

In any case, the international system we find ourselves in today is unlike any we have seen over the past century. Cold War bipolarity and post-Cold War unipolarity were historical anomalies. The end of World War II left two superpowers that could project power globally for the first time, and the collapse of the Soviet Union left the United States alone as a global power. But the order that is developing now is not focused on global competition to the same degree. While the Cold War and post-Cold War orders were Western centered, the emerging order, according to political scientists [Barry Buzan and George Lawson](#), is a decentered one “in which the configuration that marks the global transformation is no longer concentrated in a small group of states but is increasingly dispersed.” Rather than great powers competing around the world, a more likely scenario is a world of regional orders, in which regional powers compete to set the norms and practices that neighbouring powers need to follow.

Russia’s case is illustrative. Prior to its disastrous war in Ukraine, many saw Russia as a global power. Its cooperation with Iran made it a consequential actor in the Middle East, and its support for Bashar al-Assad in Syria was instrumental for the regime’s survival. Since the 2022 invasion of Ukraine, however, the illusion of Russia’s global power has dissipated. Moscow could no longer prop up Assad’s regime when support was most needed and, beyond rhetorical backing, it was not able to help Iran during the twelve-day war with Israel. Russia is a European power—and a challenged one at that, even as its [threat](#) to the continent has increased.

China’s response to events in the Middle East since the October 7, 2023, Hamas attack on Israel is also telling. In the months leading up to the attack, a popular narrative had emerged of China filling a power vacuum in the Middle East. Xi was hosted for [three summits in Riyadh](#) in December 2022, he [hosted Iranian President Ebrahim Raisi](#) in February 2023, and Iran and Saudi Arabia announced a [rapprochement](#) in Beijing a month later. With the expansion of the [BRICS](#) (Brazil, Russia,

India, China, and South Africa) and the [Shanghai Cooperation Organization](#) to include Middle East and North Africa (MENA) states, China [was seen](#) as an increasingly decisive actor in the region. The gap between this perception and the reality of a self-interested power with a minimalist approach to regional security issues was laid bare after the Hamas attack and ensuing war, as well as the Houthis attacks on Red Sea shipping. Both were met with a non-response from Beijing, although there have been [persistent rumors](#) that China and the Houthis had come to an informal agreement giving Chinese vessels safe passage through the Red Sea. When Israel struck Iran in October 2024 and then again in the 12 Day War, Beijing was similarly unimpressive in supporting its [Comprehensive Strategic Partner](#). China is an Asian power surrounded by other Asian powers, many of which are US allies or partners.

That does not mean that these countries are unimportant, but it is necessary to be clear about what an emerging order looks like. These regional powers are cooperating; [China and Russia, along with Iran and North Korea](#) – collectively referred to as CRINK – have found ways to support each other and act as [force multipliers](#). Russia’s war effort in Ukraine, for example, has relied on funds from trade with China—which also supplies dual-purpose components that have found their way into Russian weapon systems—North Korean troops, and Iranian drones. Iran, on the other hand, has seen less decisive support from its fellow CRINKs. China, for instance, has limited its engagement to purchasing discounted oil from the Islamic Republic, a transactional relationship that keeps the regime in Tehran on economic life support while helping satisfy Beijing’s insatiable demand for energy.

The most significant binding mechanism that animates this cooperation is a shared grievance: a sense that the liberal international order is designed to keep these countries on the outside looking in, and that the Western-dominated order wants to subvert authoritarian governments and promote liberal, democratic values as the preferred norm. While Russia, Iran, and North Korea have not articulated an alternative order beyond calls for multipolarity, China has been promoting its own [preferred mechanisms](#) of global governance, rolling out a series of global initiatives since 2020: the Global Development Initiative (2020), Global Security Initiative (2022), Global Civilization Initiative (2023), and Global Governance Initiative (2025). While these are still rather opaque, at heart they are essentially based on illiberal, state-centric approaches to development and security. A strong state may provide safety and prosperity; a weak state certainly cannot. Tools of state control, like repression, surveillance, censorship, and suppressing dissent are justified as providing stability - a necessary precondition for development. Beijing can point to its own transformation as proof of concept. In the late 1970s China was one of the least developed countries in the world and now has the

second-largest economy. For countries of the Global South, there are lessons to be learned from China's success, and while these global initiatives have yet to gain widespread traction, they currently represent the most compelling challenge to the liberal international order.

What does this mean for the Gulf? On one hand, the United States, the European Union (EU), Russia, and China all have economic interests there and want to see a stable, prosperous region. The United States and EU have reinforced these economic interests with security commitments that maintain this stability. At the same time, it is not a top-tier foreign policy priority for any of them. The United States has identified the Indo-Pacific as its priority theater and, under Trump, has been more focused on the Western Hemisphere. Both the EU and Russia remain focused on Europe. China has several pressing issues on its vast periphery, occupying itself with Taiwan, the South China Sea, and increasing tensions with Japan. Nobody outside the Gulf sees the region as a core interest. This means that there is more room for Gulf actors to set their own agendas for regional political, economic, and security affairs. But, at the same time, the Gulf can be a theater of competition for external powers that do not want to confront each other within their own spheres of influence. China, for example, has proven willing to support Iran as a means of distracting the United States; it is preferable to facing Washington directly in the South China Sea.

Gulf leaders therefore face an unusual moment, in which changes at the international level create opportunities and challenges within their own region. They will continue to make alignment choices, presumably based on a rational calculation of their interests. There is an assumption that, as illiberal monarchies, Gulf Cooperation Council (GCC) states fit more comfortably with authoritarian states on a values basis. But again, their alignment decisions are less about values than interests. While there is little interest in liberalism as a domestic ideology, GCC leaders deeply appreciate the embedded liberalism that shapes the Western-led international order. They appreciate the stability, predictability, market access, free trade, and dispute mechanisms that guide international relations. There is little interest in the alternatives being promoted by China through its global initiatives, although GCC countries are happy to continue their dense economic partnerships with Beijing.

Iran, meanwhile, does not have the same options as its GCC neighbors. It has been effectively shut out of the liberal international order and therefore has no stake in its stability. It is a revolutionary revisionist state, meaning it wants to change both the rules of the order and the status hierarchy within it. Russia and China are the only powers that Tehran sees as sharing this orientation, even though they have proven unreliable in Iran's time of need.

Taken together, on a macro level, the conditions are ripe for great-power competition in the Gulf.

■ Evolving power dynamics

How are Gulf leaders responding to this changing environment? GCC countries are often described as hedgers—balancing their interests by pursuing close ties with everyone. On the face of it, that logic makes sense. All GCC countries have some level of strategic partnership relationship with China, and all have pursued stronger relationships with Russia in recent years. At the same time, they continue to invest heavily in Europe and the United States, and have deep and long-standing defense partnerships with the Washington, London, and Paris. One would be forgiven for assuming they are playing both sides against each other, waiting to see which offers the better deal or comes out on top in their great-power competition.

That said, GCC leaders have their own preferences for regional order and have agency in pursuing such an order. Hedging implies a wait-and-see attitude, and their actions indicate anything but that. Gulf countries are building relationships around two tracks: those that promote their development agendas and those that contribute to regional stability.

Prior to the October 7, 2023, attack, “de-escalation” was the buzzword in the Gulf. Mohammed Baharoon of the Dubai Public Policy Research Center [described it as](#) “a fundamental overhaul of the zero-sum calculus that has underpinned geopolitical tensions in the region.” Domestic reform agendas like Saudi Vision 2030 and regional initiatives like the [India-Middle East-Europe Economic Corridor \(IMEC\)](#) required a functional and stable region that could attract foreign direct investment, international talent and know-how. This is hard to achieve in a region with multiple security flashpoints. The Abraham Accords, the United Arab Emirates’ (UAE) re-engagement with Turkey in 2021, Saudi-Iran rapprochement, and the end of Qatar’s dispute with Saudi Arabia, Bahrain, Egypt, and the UAE were all examples of regional efforts to tamp down sources of conflict that destabilize the Gulf.

While the intense series of conflicts and wars since October 7 have affected the trajectory of this de-escalation—particularly with respect to IMEC-affiliated projects—the underlying logic remains. The Gulf can be a prosperous region, but stability is crucial. In an October 2025 United Nations Security Council meeting, Qatari Ambassador Sheikha Alya bint Ahmed bin Saif Al-Thani [called for](#) “constructive initiatives to find means toward de-escalation and settle differences through dialogue.”

In this case and from a Gulf perspective, the role of external powers is based on their ability to support these [dual agendas](#) of domestic development and regional stability. Again, these relationships are not values-based but interest-based. States

that offer long-term, reliable partnerships that support these two tracks will find themselves at the front of the line.

More and more, the predictability of a rules-based order is seen as the preference, and Gulf leaders see their partnership with Washington as a [key element](#) of this. Saudi Foreign Minister Faisal bin Farhan Al Saud [recently described](#) the United States as “an essential actor in what concerns peace in the Middle East.” In a November 2025 speech, the UAE’s senior presidential advisor Anwar Gargash claimed that in the Middle East, “the role of the United States remains indispensable” and that political solutions to regional problems can only be

met with Arab alignment under US leadership. Recent bilateral developments—the 2023 US-Bahrain Comprehensive Security Integration and Prosperity Agreement, 2025 US security assurances for Qatar, and the ongoing negotiations for an enhanced US-Saudi security relationship—indicate that this view is shared across the GCC. While working with Europe is not seen as meeting as broad a range of interests, the importance of predictability and rules-based international relations could open the door for a deeper Gulf-European partnership too – if the Europeans can take advantage of the opportunity.

The Scowcroft Middle East Security Initiative (SMESI) pays tribute to Brent Scowcroft’s efforts to ensure a cohesive and robust relationship between the US and the region. Those associated with the Initiative engage on a myriad of critical, pan-regional topics, to include: China, Russia, and great power competition in the Middle East; the future of Iran; impending regional security challenges; the politics of Middle East states and decision-making of its leaders; intraregional tensions and conflict; climate and human security challenges; interstate warfare; emerging technologies and their impact on strategic relationships; and the underlying threats facing regional states. SMESI provides policymakers fresh insights into core US national security interests by leveraging its expertise, networks, and on-the-ground programs to develop unique and holistic assessments on the future of the most pressing strategic, political, and security challenges and opportunities in the Middle East.

Konrad-Adenauer-Stiftung (KAS) – Regional Programme Gulf States

The Konrad-Adenauer-Stiftung (KAS) is a non-profit German political foundation affiliated with Germany’s largest political party, the Christian Democratic Union (CDU). With over 100 offices in more than 120 countries and more than 200 programs worldwide, KAS promotes international dialogue, democratic governance, the rule of law and sustainable socio-economic development. Within this global framework, the KAS Regional Programme Gulf States (RPG), established in 2009, focuses on strengthening political, economic, and cultural cooperation between Germany, Europe, and the countries of the Gulf Cooperation Council (GCC). Its work centers on enhancing mutual understanding, supporting economic modernization, fostering regional and collective security dialogue, an empowering youth and civil society. As a think-tank and consultancy platform, the program facilitates bi- and multilateral exchange and contributes to informed policymaking while addressing the diverse contexts and evolving priorities of the Gulf region.