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TRIPARTITE GULF POWER:
The Diverging Geoeconomics of Saudi Arabia, the UAE, and Qatar, and the Implications for MENA and the Global Order

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While acknowledging the centrality of security tensions and potential conflict in the Gulf, this essay intentionally sets aside a detailed treatment of military and hard-power dynamics, concentrating instead on the geoeconomic logics of capital, infrastructure, energy, and connectivity, through which Gulf states now articulate power in a fragmented world order.

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It examines the emergence of a new tripartite or three-pillar power configuration in the Gulf, arguing that Saudi Arabia, the United Arab Emirates, and Qatar have moved decisively beyond a shared Gulf identity toward competing geoeconomic models of power. Far from being a transient phase of intra-Gulf Cooperation Council discord, this divergence reflects a structural transformation in how these Gulf states conceive their sovereignty, influence, and global relevance in a fragmented, multipolar world.

The paper advances three core claims:

1. Gulf competition is no longer primarily ideological or security-driven, but geoeconomic. It is expressed through infrastructure, ports, corridors, energy contracts, sovereign wealth, and regulatory influence. Saudi Arabia pursues a model of sovereign scale and territorial anchoring, centered on its Vision 2030 strategy, industrial policy, and corridor-building. The UAE advances a platform-state model, leveraging logistics, finance, climate diplomacy, and global intermediation to exercise influence disproportionate to its size. Qatar, by contrast, relies on asymmetric niche power, using dominance in liquified natural gas, long-term contracts, mediation, and media outreach to achieve contractual indispensability, rather than regional primacy.

2. The influence of this Gulf divergence is increasingly being seen across Turkey, South Asia, the Eastern Mediterranean, and Africa. Turkey is a non-Gulf pole with industrial and security capabilities that align closely with Qatar, while constraining Saudi and Emirati ambitions. South Asia differentiates Gulf strategies further: Pakistan functions as a stabilization and security interface where financial leverage is deep but brittle, while India represents a scale, technology, and corridor prize that reinforces competitive interdependence rather than alignment. These arenas transform Gulf rivalry into a multi-pillar power system involving multiple middle powers with agency.

3. Gulf geoeconomics now has global governance consequences. Saudi Arabia positions itself as a voice of the New South in debates on the G20, International Monetary Fund reform, and BRICS+. The UAE reframes climate governance through pragmatic energy-transition leadership. Qatar shapes Europe's energy transition through long-term LNG lock-in. Together, these strategies illustrate how Gulf states are shifting from rule-takers to selective rule-shapers, influencing global finance, energy security, climate diplomacy, and connectivity without seeking ideological dominance.

The Gulf's evolving three-way competition represents re-composition rather than disorder. Power is exercised less through military dominance or ideology, than through ports, balance sheets, contracts, and convening authority. For MENA and the Global South, engaging with this new Gulf triad offers opportunities for diversification and leverage, but also introduces new asymmetries and strategic trade-offs in navigating the multipolar century ahead.

1. Introduction: From Gulf Unity to Strategic Divergence, With Turkey as a Pivotal External Influence

For decades, the Arab Gulf monarchies have projected an image of strategic cohesion under the institutional umbrella of the Gulf Cooperation Council. Common security concerns, hydrocarbon-based political economies, and alignment with Western security guarantees have sustained the perception of a unified Gulf bloc that is predictable, conservative, and collectively anchored in a United States-led order. While internal rivalries and asymmetries have always existed, they have been managed through informal bargaining among ruling families, and a tacit division of labor that preserved the appearance of consensus.

That equilibrium has now unraveled decisively. Since the early 2010s, the Gulf has entered a phase of structural divergence rather than episodic discord. A critical rupture occurred during the 2017–2021 blockade of Qatar, led by Saudi Arabia, the United Arab Emirates, Bahrain, and Egypt. Diplomatic normalization restored channels of communication, but did not restore a shared strategic project. Instead, Saudi Arabia, the UAE, and Qatar have emerged as three distinct power centers, each advancing its own geoeconomic model, external alignments, and vision of regional order.

This essay argues that the rivalry between Saudi Arabia, the UAE, and Qatar is no longer primarily political or ideological, but geoeconomic. Power is increasingly exercised through sovereign wealth, infrastructure investment, logistics platforms, energy contracts, regulatory regimes, and strategic diplomacy, rather than through traditional coercive instruments. The Gulf is thus becoming a laboratory for a broader transformation in international relations, in which influence is accumulated through control of capital flows, corridors, standards, and connectivity, rather than territory or military alliances.

Crucially, this intra-Gulf divergence cannot be understood in isolation from the rise of Turkey as an autonomous, activist middle power. Over the past decade, Turkey has moved from being a peripheral partner for the Gulf to a decisive external variable that shapes Gulf alignments and rivalries. Ankara's assertive regional posture combines military projection, defense industrial exports, infrastructure diplomacy, and transactional partnerships. It has intersected unevenly with the strategies of Gulf states.

For Qatar, Turkey has functioned as a strategic guarantor and amplifier of autonomy, most visibly during the blockade years, when a Turkish military presence and logistical support helped Doha withstand pressure and diversify its security dependencies. For Saudi Arabia and the UAE, by contrast, Turkey is often perceived as a competitor that challenges their influence in the Eastern Mediterranean, the Red Sea, the Horn of Africa, and parts of the Levant, while offering an alternative political and economic model to smaller states seeking room for maneuver.

Turkey's influence in this setting is not limited to hard power. It is a hybrid geoeconomic actor: neither a rentier hydrocarbon state, nor a purely financial hub, but an industrial, demographic, and military-capable economy that trades access, production, and security services for influence. Its growing footprint in construction, defense technologies, energy transit, and post-conflict reconstruction makes it a significant partner—or rival—in Gulf-led regional projects. In effect, Turkey introduces a non-Gulf pole into what might otherwise appear as a closed three-way competition.

Divergence in the Gulf is also increasingly shaped by two other Asian countries that anchor the external projection of Gulf power: Pakistan and India. Pakistan represents a theater of stabilization diplomacy and strategic leverage, with its financial support, security ties, and labor flows allowing Gulf states to translate economic assistance into political influence—though at the cost of exposure to chronic volatility. India, by contrast, embodies scale, technology, and corridor power: a rising economy with the energy demand, infrastructure ambitions, and strategic autonomy to make it a prize partner and a gateway to broader Indo-Pacific and global value chains (GVCs).

Turkey, Pakistan, and India illuminate how Gulf geoeconomics now operate outward, not merely inward. Saudi Arabia, the UAE, and Qatar are not competing only over Gulf primacy, but over who shapes the architecture that links the Middle East to Eurasia, South Asia, and global markets.

Seen through this wider lens, the Gulf is no longer a single actor in Middle Eastern geopolitics but a system of three parts embedded in a multipolar environment, marked by competition, overlap, and selective cooperation. Saudi Arabia advances a state-centric vision of primacy rooted in scale, centralization, and transformational ambition. The UAE deploys a network-based model built on logistics, finance, and platform power. Qatar sustains a niche strategy centered on energy dominance, diplomatic mediation, and strategic partnerships—most notably with Turkey—that reinforce autonomy rather than hierarchy.

This essay situates the diverging geoeconomics of Saudi Arabia, the UAE, and Qatar within this broader transformation, explicitly integrating the 'Turkey factor' as a structural variable rather than a subplot. It argues that what seems to be Gulf fragmentation is better understood as recomposition: the emergence of multiple, competing Gulf-centered and Gulf-adjacent visions of regional order. The implications of this tripartite (and increasingly multi-actor) power configuration extend well beyond the Gulf. It is reshaping the political economy of Middle East and North Africa, redefining South-South and Asia-Middle East relations, and contributing to a global system increasingly organized around geoeconomic competition rather than universal rules.

2. Strategic Divergence and National Visions

The transformation of the Gulf triad is rooted in diverging national visions—not merely policy choices, but competing conceptions of how power should be accumulated, exercised, and projected in a post-unipolar world. Saudi Arabia, the UAE, and Qatar are distinguished not only by scale or ambition, but by the strategic philosophy that underpins their economic transformations. These visions are not complementary; they represent mutually exclusive models of statehood and influence in a context of global fragmentation.

2.1. Saudi Arabia: Vision 2030 and the Politics of Centralized Transformation

Saudi Arabia's Vision 2030 is the most ambitious state-led transformation project in the contemporary Middle East. It is a deliberate effort to re-engineer the Kingdom from a classic rentier petro-state into a diversified, industrial, and geopolitically autonomous power. Unlike incremental reform agendas elsewhere, Vision 2030 is revolutionary in scope and method: it seeks to reorder the economy, the social contract, the role of the state, and Saudi Arabia's position in the global hierarchy.

Under Crown Prince and Prime Minister Mohammed bin Salman, economic power in Saudi Arabia has been decisively centralized. The Public Investment Fund (PIF) has evolved from a passive sovereign wealth vehicle into a strategic instrument of statecraft, channeling capital into megaprojects including the planned cities of NEOM and Qiddiya, Red Sea tourism, logistics corridors, mining, defense industries, and advanced manufacturing. These projects are not designed primarily for short-term profitability; they are intended to re-anchor Saudi Arabia structurally within GVCs as a producer, regulator, and market-maker.

What differentiates the Saudi model is its inward-first logic. Transformation begins at home through labor-market nationalization, industrial policy, and regulatory consolidation, and is only then projected outward. This reflects a realist reading of vulnerability: dependence on external capital, Western markets, and security guarantees are seen as strategic liabilities. Vision 2030 therefore encapsulates the implicit geopolitical ambition of reducing Saudi Arabia's exposure to Western conditionality, while building leverage in relation to both traditional allies and emerging partners.
This centralization, however, also creates external and internal friction. Regionally, Riyadh's drive for primacy challenges the networked models of smaller Gulf states. Globally, it unsettles partners accustomed to Saudi Arabia as a predictable energy supplier rather than a rule-setter in new sectors including hydrogen, mining, logistics, and digital infrastructure. Vision 2030 is thus a bid for systemic relevance in a world in which scale and sovereignty are returning as decisive assets.

2.2. The United Arab Emirates: Network Power and Platform Geoeconomics

In contrast, the UAE has pursued a radically different vision of power, which privileges connectivity over centralization, and networks over hierarchy. Rather than attempting to remake society through megaproject-driven transformation, the UAE—particularly Abu Dhabi and Dubai—has refined a dual-city model that blends state capitalism with extreme openness.

Abu Dhabi provides the strategic backbone: energy rents, sovereign capital, defense capabilities, and long-term geopolitical positioning. Dubai functions as a global interface: finance, logistics, aviation, tourism, digital services, and entrepreneurial ecosystems. Together, they form a platform state: a jurisdiction designed to attract, intermediate, and arbitrage global capital, goods, talent, and data flows.

This model gives the UAE disproportionate influence relative to its size. Control over ports, airlines, free zones, financial infrastructure, and logistics corridors allows Abu Dhabi and Dubai to shape trade routes and supply chains from East Africa to South Asia and Europe. Influence is exercised not through dominance, but through indispensability: by being the place where deals are made, through which goods pass, and where disputes are resolved quietly.

Unlike Saudi Arabia's inward-focused transformation, the UAE's strategy is outward-facing and entanglement-driven. Its leadership actively embraces interdependence by diversifying partnerships across the U.S., Europe, China, India, Africa, and increasingly the Global South. This makes the UAE agile and resilient, but also structurally different from Riyadh. Where Saudi Arabia seeks autonomy through scale and production, the UAE seeks resilience through optionality and redundancy.

This divergence has strategic consequences. Abu Dhabi's emphasis on speed, regulatory flexibility, and global embeddedness often clashes with Riyadh's push to recentralize regional capital flows toward Saudi-based hubs. The competition over headquarters relocations, logistics dominance, and investment destinations is therefore not tactical. Rather, it reflects two incompatible theories of geoeconomic power.

2.3. Qatar: Asymmetric Autonomy and Strategic Niche Power

Qatar offers a third, distinct model, which rejects both Saudi-style centralization and Emirati-style platform dominance. As a small state with outsized resources, Qatar has refined an asymmetric strategy of autonomy, built on niche dominance rather than breadth.

The experience of the 2017–2021 blockade was formative. It crystallized Doha's belief that survival in a fragmented order depends on diversified dependencies, strategic visibility, and narrative power. Qatar responded by doubling down on select levers: global leadership in liquified natural gas (LNG), diplomatic mediation, media influence, and strategic partnerships, most notably with Turkey.

Energy lies at the core. Qatar's dominance in LNG provides long-term contractual relationships with Europe and Asia that translate into geopolitical relevance far beyond its size. Unlike oil, LNG creates lock-in: infrastructure, terminals, and long-term supply agreements generate durable interdependence. This allows Doha to act with confidence and resist regional pressure.

Beyond energy, Qatar deploys soft and diplomatic power with precision. Through the Al Jazeera media company, mediation roles in conflicts, and engagement with a wide spectrum of political actors, including Islamist movements, Qatar positions itself as an interlocutor. This approach differentiates it sharply from both Riyadh and Abu Dhabi, which have more state-centric and security-driven foreign policies.

Qatar's model is thus not one of dominance, but of strategic indispensability. It seeks to remain relevant to all sides while being subordinated to none. In a fragmented world order, this niche strategy offers insulation, but also generates persistent tension with neighbors that are pursuing broader hegemonic ambitions.

2.4. Incompatible Visions in a Fragmented Order

These three national visions offer competing answers to the same question: how should a state accumulate power when globalization no longer guarantees convergence, and when Western leadership is selective, transactional, and contested?

- Saudi Arabia answers with scale, sovereignty, and centralization;
- The UAE answers with connectivity, flexibility, and platform power;
- Qatar answers with asymmetry, niche dominance, and strategic autonomy.

These are rival models of order-making. Each implies different regional architectures, different partnerships (including with Turkey, India, and Pakistan), and different relationships with global institutions and great powers.

Consequently, Gulf divergence should not be misread as instability or dysfunction. It reflects a deeper structural reality: the Gulf is no longer a cohesive subsystem, but a competitive arena in which multiple visions of geoeconomic power coexist and collide.

3. GEOECONOMIC INSTRUMENTS: INFRASTRUCTURE, PORTS, AND CORRIDORS

Geoeconomics is the new language of Gulf competition. Each power seeks to control the flow of goods, capital, and influence through infrastructure and investment:

- The UAE, via DP World, commands a global port empire. It manages more than 80 terminals in over 40 countries, extending the UAE's influence from Djibouti to Senegal, India to Brazil. Its 'Maritime Silk Road' strategy enables logistical entrenchment without a military footprint (Oxford Economics, 2023).
- Saudi Arabia, aiming to catch up, is building a rival logistical corridor. It has poured billions into Red Sea ports, railways, and the Saudi Global Logistics Hub, aiming to redirect global shipping through its territory. The India-Middle East-Europe Corridor (IMEC), unveiled in 2023, is Riyadh's counter to both China's Belt and Road and UAE's maritime dominance (World Bank, 2024a).
- Qatar lacks comparable geography but compensates through strategic investments in energy terminals, European ports, and global airlines. Qatar Airways, QatarEnergy, and the Qatar Investment Authority (QIA) form a strategic triad that allows Doha to punch far above its weight. LNG terminals in Poland, Germany, and the United Kingdom now depend on Qatari supply (IEA, 2023).

The race to control regional connectivity reflects not just economic ambition but a remapping of geopolitical hierarchies via trade, logistics, and energy access.

4. Energy, Finance, and Sovereign Capital as Instruments of Power

If infrastructure and corridors are the spatial dimension of Gulf geoeconomics, energy, finance, and sovereign capital form its balance-sheet dimension. Together, they translate resource endowments into long-term leverage, binding partners through contracts, liquidity provision, and investment dependency. In a fragmented global economy marked by energy insecurity, capital scarcity, and geopolitical risk, Gulf states have learned to convert abundance into structural influence, rather than episodic bargaining power.

4.1. Energy Statecraft After the Energy Shock

The 2022 energy shock accelerated a transformation that was already underway: energy is no longer just a commodity, it is a strategic relationship.

- Saudi Arabia continues to wield oil-market leadership through scale and spare capacity, but it increasingly pairs production management with downstream integration: refining, petrochemicals, and emerging hydrogen and minerals strategies. The objective is to move from price influence to value-chain control, anchoring long-term partnerships with Asia, and selectively with Europe, while retaining the ability to discipline markets.

- Qatar has emerged as the pre-eminent LNG security provider. Long-term LNG contracts—often 15–25 years—create durable interdependence, locking in infrastructure, regulatory alignment, and political attention. This transforms energy trade into contractual geopolitics, with reliability and scale conferring agenda-setting power.
- The UAE positions itself as an energy-transition broker. Maintaining oil capacity while investing aggressively in renewables, nuclear, and low-carbon technologies allows Abu Dhabi to speak the language of both incumbency and transition. This duality enhances its credibility across Europe, Asia, and the Global South.

The net effect is a differentiated energy diplomacy: Saudi Arabia shapes markets through scale; Qatar through lock-in; the UAE through diversification and transition signaling.

4.2. Sovereign Wealth Funds: Balance Sheets as Foreign Policy

Sovereign wealth funds (SWFs) are now among the most potent—and least visible—tools of Gulf power. They operate across jurisdictions, sectors, and political cycles, offering patient capital at a time when global financing conditions are tightening.

- Saudi Arabia's Public Investment Fund (PIF) functions as a developmental SWF, tightly aligned with Vision 2030 priorities. It absorbs risk domestically, co-invests strategically abroad, and leverages scale to negotiate technology transfer, localization, and market access.
- The UAE's sovereign funds operate with portfolio diversification and optionality. Investments prioritize resilience, liquidity, and strategic positioning across technology, infrastructure, and finance, reinforcing the UAE's platform-state logic.
- The Qatar Investment Authority (QIA) pursues node embedding by taking stakes in critical firms, infrastructure, and assets across Europe and advanced economies. These positions enhance political visibility and access, while preserving strategic autonomy.

For all three, SWFs have become counter-cyclical stabilizers for partners under stress, most visibly in emerging markets. This stabilizing role confers influence, but also exposes Gulf states to political risk and reputational entanglement, sharpening the trade-off between leverage and liability.

4.3. Finance, Liquidity, and the Politics of Stabilization

Beyond long-term investment, Gulf states increasingly deploy liquidity support—deposits, guarantees, and financing assurances—as instruments of influence. This is especially visible in relationships with fiscally constrained partners in MENA, South Asia, and parts of Africa.

Liquidity support differs from aid. It is conditional, reversible, and strategic. It buys time, signals confidence to markets, and can unlock multilateral financing, while preserving leverage over policy direction, asset access, or diplomatic alignment. The practice turns financial fragility elsewhere into a strategic instrument for Gulf power.

Yet this tool also carries risks. Repeated stabilization without reform can entrench dependency. Politicized support can invite backlash. Exposure to domestic instability abroad can complicate Gulf portfolios. The result is a careful calibration between influence and insulation—a hallmark of mature geoeconomic statecraft.

4.4. From Rentiers to Systemic Actors

Moves in energy, finance, and sovereign capital illustrate a decisive shift in the Gulf states. They are no longer mere rentiers reacting to global markets. They are systemic actors shaping market structures, financing conditions, and energy-security architectures.

This shift reinforces the three-way divergence outlined earlier:

- Saudi Arabia seeks sovereign scale, using energy and capital to build domestic industrial capacity and command respect externally.
- The UAE seeks systemic centrality, intermediating flows of energy, capital, and technology.
- Qatar seeks contractual indispensability, locking in long-term relevance through energy and strategic investment nodes.

The cumulative effect is a Gulf region that now exports stability, liquidity, and connectivity, but on terms increasingly set in Riyadh, Abu Dhabi, and Doha, rather than in Washington, Brussels, or multilateral institutions.

5. Turkey, South Asia, and the Externalization of Gulf Competition

The strategic divergence of the Gulf triad is increasingly projected outward into adjacent regions, where Gulf capital, energy, security ties, and diplomatic activism intersect with other emerging middle powers. Turkey and South Asia are the most important of these external theaters.

What distinguishes this phase is that these external arenas are not passive recipients of Gulf influence. They are interactive spaces in which Gulf models of power confront alternative visions of sovereignty, development, and strategic autonomy—and are, in turn, constrained, adapted, or hybridized.

5.1. Turkey: A Non-Gulf Pole in the Gulf Power Equation

Turkey's rise is the most structurally disruptive external factor in contemporary Gulf geopolitics. Unlike most regional actors, Turkey has industrial capacity, demographic weight, military power, and diplomatic ambition. It is neither a rentier state nor a purely financial hub, but a production-based, security-capable middle power with revisionist instincts.

5.1.1. Turkey-Qatar: Strategic Symbiosis and Autonomy Reinforcement

Turkey's closest Gulf alignment is with Qatar, and this relationship is best understood as strategic symbiosis rather than ideological affinity alone. During the 2017–2021 blockade, Turkish military presence, airlift capacity, and political backing were decisive in reinforcing Qatar's autonomy. In return, Qatari capital flowed into Turkey's financial system, infrastructure, and defense sector at moments of economic vulnerability.

This alignment has reinforced Qatar's asymmetric autonomy model:

- Turkey provides hard security depth and industrial capacity;
- Qatar provides liquidity, energy security, and diplomatic reach.

Together, they form a mini-axis that privileges strategic flexibility over regional dominance. Crucially, this partnership allows Qatar to resist Gulf hierarchical pressures, without aspiring to hegemony itself.

5.1.2. Turkey vs. Saudi Arabia and the UAE: Competitive Overlap, Not Zero-Sum Conflict

For Saudi Arabia and the UAE, Turkey is more ambiguous: sometimes a partner, often a competitor.

- In the Eastern Mediterranean, Turkey's assertive maritime posture, defense exports (notably drones), and infrastructure diplomacy complicate Emirati and Saudi ambitions;
- In the Red Sea and Horn of Africa, Turkish presence overlaps with Emirati port and security networks;
- In post-conflict situations and reconstruction (Libya, parts of the Levant), Turkish firms and security arrangements offer an alternative to Gulf-backed stabilization models.

Importantly, Turkey challenges not Gulf wealth per se, but the assumption that capital alone defines leadership. Its model—industrial, nationalist, and security-forward—appeals to states wary of financial dependency. This forces Saudi Arabia and the UAE to adapt: to blend capital with production, security cooperation, and political respect for sovereignty.

Turkey thus functions as a non-Gulf pole within the Gulf competition. It prevents the emergence of a closed Gulf-centered order and is accelerating the shift toward what is more a multi-pillar regional system.

5.2. Pakistan: Stabilization, Security, and the Politics of Financial Leverage

If Turkey represents a strategic competitor with agency, Pakistan represents a different external interface: a state in which Gulf power is present through stabilization, security ties, and financial leverage.

Pakistan occupies a unique place in Gulf geoeconomics:

- It is a major labor exporter to the Gulf;
- A long-standing security partner, especially for Saudi Arabia;
- A recurrent macro-financial stress case, reliant on external deposits, guarantees, and International

Monetary Fund programs.

5.2.1. Differentiated Gulf Approaches to Pakistan

Pakistan exposes sharp contrasts between the Gulf powers:

- Saudi Arabia views Pakistan through a strategic depth and security lens. Financial assistance, oil facilities, and investment pledges are closely tied to political alignment, military cooperation, and regional diplomacy;
- The UAE approaches Pakistan more transactionally, emphasizing deposits, ports, logistics, and commercial investments with greater exit flexibility;
- Qatar, while important as a destination for labor and diplomacy, plays a more limited financial role compared to Riyadh and Abu Dhabi.

In Pakistan, Gulf influence is conditional but fragile. Financial support buys time and access, but not structural alignment. Pakistani elites increasingly hedge, balancing Gulf support with China, multilateral institutions, and domestic political constraints.

Pakistan thus illustrates the limits of stabilization geoeconomics: leverage is real, but difficult to convert into long-term control without political backlash or overexposure.

5.3. India: Scale, Corridors, and Strategic Autonomy

While Pakistan is a stress test, India is the big prize for Gulf outreach. India's vast market, energy demand, technological ecosystem, and strategic autonomy make it indispensable, but also unconquerable by any single partner.

5.3.1. Divergent Gulf Strategies toward India

India reveals the sharp differentiation between Gulf models:

- The UAE has positioned itself as India's preferred platform partner. It leverages ports, logistics, finance, and diaspora ties to embed itself in India-facing trade and investment flows;
- Saudi Arabia pursues a state-to-state, energy-and-industry partnership, aligning India's growth with Saudi downstream, refining, and future hydrogen ambitions;
- Qatar focuses on energy security, using long-term LNG contracts to secure relevance without overreach.

India welcomes all three, but aligns with none. It treats Gulf states as complementary nodes, not patrons, reinforcing its own multi-vector strategy.

5.3.2. Corridors as Geopolitical Propositions

Initiatives such as the India-Middle East-Europe corridor illustrate how India becomes a theater of corridor competition. Gulf states seek to anchor connectivity through their territories, while India seeks optionality, redundancy, and strategic autonomy. The result is not convergence, but competitive interdependence.

5.4. From External Arenas to a Multi-Pillar Power System

Taken together, Turkey and South Asia demonstrate that Gulf competition has outgrown the logic of blocs. Instead, it produces a multi-pillar power system characterized by:

- Middle powers with agency (Turkey, India);
- Vulnerable states that nevertheless have leverage (Pakistan);
- Overlapping corridors, contracts, and security ties, rather than exclusive spheres.

In this system:

- Gulf states project influence outward, but cannot monopolize outcomes;
- External actors extract value from Gulf competition while preserving autonomy;
- Regional orders are reshaped incrementally, through deals rather than doctrines.

This externalization constitutes a central thesis of this essay: Gulf divergence is not equivalent to destabilization or chaos, but a new mode of ordering. It is messier, and more transactional and adaptive than power that radiates from a single center. It circulates through ports, deposits, defense ties, energy contracts, and corridors, binding the Gulf states to Turkey, South Asia, and beyond in a dense web of mutual constraint and opportunity.

6. Political Alignments, Security Recalibration, and the Limits of Gulf Power

The spread of Gulf competition into Turkey, South Asia, and adjacent regions inevitably feeds back into political alignments and security architectures. Yet the outcome is not Gulf dominance. Instead, it is a more complex landscape in which Gulf states gain leverage while simultaneously encountering limits to conversion, which are imposed by local agency, great-power hedging, domestic politics, and the growing costs of overreach.

6.1. From Security Umbrellas to Modular Security

One of the most consequential shifts accompanying Gulf geoeconomic expansion is the move from comprehensive security umbrellas toward modular, 'à-la-carte' security arrangements. This reflects both the recalibration of Western commitments and the Gulf states' own desire to avoid dependency.

- Saudi Arabia increasingly prioritizes deterrence by capacity—air and missile defense, defense industrialization, and selective strategic guarantees—over blanket alliances. Security ties are embedded in state-to-state bargaining, and often paired with economic packages, energy cooperation, or investment access;
- The UAE favors operational security that protects flows: maritime security, counterterrorism, cyber and critical-infrastructure protection. This aligns with its platform-state logic in which security is a service to keep corridors open, rather than to dominate territory.
- Qatar practices security pluralism. It hosts Western forces while cultivating strategic depth

through Turkey, and energy interdependence with Europe and Asia. Security is diversified, redundant, and deliberately non-exclusive.

The cumulative effect is a menu-based security order. States select capabilities, partners, and time horizons, rather than signing up to comprehensive alliances. This enhances autonomy but reduces predictability, especially in crises that require rapid coordination.

6.2. MENA States: Acceptance Without Alignment

Across MENA, states on the receiving end of Gulf diplomacy and activity have become more adept at decoupling economic engagement from political alignment. Gulf capital, energy, and infrastructure are welcomed, but rarely at the price of sovereignty or exclusive loyalty.

Several patterns stand out:

- Multi-vector diplomacy has become the norm. States in North Africa, the Levant, and the Horn of Africa simultaneously court Saudi scale, Emirati platforms, Qatari energy, Turkish production, Chinese financing, and Western security.
- Ringfencing of assets is increasingly common. Ports, energy projects, and logistics concessions are structured to limit long-term control, renegotiate terms, or preserve regulatory sovereignty.
- Competitive bidding replaces patronage. Gulf offers are weighed against alternatives, turning Gulf rivalry into leverage for recipient states.

These dynamics temper the influence of Gulf countries. While capital and connectivity confer access and agenda-setting power, they rarely translate into durable political alignment. Gulf states are influential partners, but seldom hegemonic patrons.

6.3. Exposure, Backlash, and the Political Economy of Risk

Geoeconomic power brings exposure. As Gulf states deepen their footprints abroad, they inherit political, social, and reputational risks that were once externalized.

- Infrastructure politics: ports, railways, and energy terminals become symbols of foreign influence, vulnerable to nationalist backlash or regime change;
- Stabilization fatigue: repeated financial rescues (notably in fiscally-stressed partners) can entrench expectations without delivering reform, creating moral hazard and domestic resentment;
- Geopolitical spillovers: involvement in contested regions exposes Gulf actors to the risk of sanctions, reputational costs, or secondary conflicts between great powers.

These risks impose constraints. Gulf geoeconomics must increasingly be accompanied by risk management, local partnership, and political sensitivity. These considerations raise transaction costs and hold up deployment.

6.4. The Conversion Problem: From Leverage to Leadership

The central strategic challenge for Gulf powers is conversion: translating economic leverage into sustainable leadership without triggering resistance.

- Saudi Arabia faces the dilemma of scale: its ambitions are commensurate with leadership, but leadership requires legitimacy beyond capital;
- The UAE benefits from deniability and flexibility, but its platform model can be perceived as transactional rather than transformative;
- Qatar enjoys niche indispensability, but niche power does not aggregate easily into regional authority.

Turkey and India have sharpened this conversion problem. Both accept Gulf engagement while retaining strategic autonomy. In Turkey's case, alternative models of power are actively projected. Pakistan illustrates the opposite risk: leverage without structural transformation, yielding influence that is deep but brittle.

6.5. What Emerges: Influence Without Hegemony

The net result is a regional and transregional order characterized by influence without hegemony:

- Gulf states shape agendas, flows, and choices;
- Partner states hedge, arbitrate, and extract value;
- Security arrangements are layered and situational;
- Alignment is provisional and reversible.

This is not instability. Rather, it is a new equilibrium suited to a fragmented world. Power is exercised through presence rather than command, through options rather than orders.

7. Global Reach: From LNG to BRICS to Climate Diplomacy

What distinguishes the current phase of Gulf power is not only its regional reach, but its global projection. Saudi Arabia, the UAE, and Qatar no longer behave as rule-takers within an inherited international system. Increasingly, they act as selective rule-shapers, intervening in global debates on finance, energy, climate, and development, from positions grounded in material leverage rather than normative alignment.

These global ripples from Gulf competition are clear manifestations of how middle powers from the New South are reshaping global governance in an era of multipolarity, institutional fatigue, and strategic fragmentation.

7.1. Saudi Arabia: From Regional Power to Systemic Challenger

Saudi Arabia's global posture has evolved decisively over the past decade. No longer content with being a rule-compliant stakeholder in the Bretton Woods institutions, Riyadh increasingly positions itself as a systemic interlocutor between the Global North and the New South.

Through its growing role in the G20, development-finance debates, and calls for reform of multilateral institutions, Saudi Arabia is framing itself as a representative of countries constrained by outdated governance structures. Its critique of the IMF and World Bank is not revolutionary, but revisionist. It demands quota reform, a greater voice for emerging economies, and financing frameworks better aligned with energy transitions, industrial policy, and development realism.

This positioning gained further symbolic weight with Saudi Arabia's accession to BRICS+ in 2024. While BRICS+ is not a cohesive alternative order, membership signals Riyadh's strategic intent to diversify its institutional affiliations and reduce overreliance on Western-led frameworks. It reflects a broader Saudi strategy of remaining engaged with the West while embedding itself more deeply in a multipolar ecosystem that includes China, India, and other New-South actors (IMF, 2024).

Importantly, Saudi Arabia does not seek to dismantle global institutions. It seeks to rebalance them. Its global activism is grounded in scale—energy, capital, population—and in a realist conviction that legitimacy in the twenty-first century will flow from material contribution rather than normative conformity.

7.2. The UAE: Climate Diplomacy and the Politics of Pragmatism

The UAE's global strategy follows a markedly different trajectory. It is less confrontational, more agenda-curating. Hosting the COP28 climate summit in 2023 crystallized Abu Dhabi's aim to position itself as a broker between climate ambition and energy realism.

As a major hydrocarbon exporter investing heavily in renewables, hydrogen, nuclear power, and green finance, the UAE embodies what might be termed climate pragmatism. Rather than framing decarbonization as an ideological rupture, it presents the energy transition as a managed, investment-driven process, compatible with continued fossil-fuel production in the medium term.

This approach serves several geoeconomic purposes:

- It protects the UAE's core energy revenues while enhancing reputational capital;
- It positions Abu Dhabi as a convening hub for climate finance, technology partnerships, and South-South cooperation;
- It aligns with the UAE's broader platform-state model: hosting negotiations, intermediating capital, and shaping standards without imposing doctrine.

Critically, the UAE's climate leadership does not rest on moral authority, but on operational credibility—its ability to mobilize capital, deploy projects, and bridge competing interests. This reinforces its global influence while insulating it from the polarizing climate politics that divide North and South.

7.3. Qatar: LNG, Europe, and the Geopolitics of Energy Transition

Qatar's global outreach is more targeted, but no less consequential. Its dominance in LNG has transformed it into a central pillar of global energy security, particularly for Europe following the rupture in Russian gas supplies.

Long-term LNG agreements with Germany, Italy, the United Kingdom, and other European states embed Qatar deeply into Europe's energy transition. These contracts do more than supply gas; they shape infrastructure investment, regulatory choices, and timelines for decarbonization. In effect, Qatar has become a gatekeeper of transition realism, reminding European policymakers that energy security and climate ambition must be reconciled through long-term supply certainty.

Beyond energy, Qatar continues to exercise global influence through:

- Media ecosystems (notably Al Jazeera), shaping narratives across the Global South;
- Elite sponsorship and humanitarian diplomacy, particularly in fragile and conflict-affected settings;
- Conflict mediation, reinforcing its image as an indispensable interlocutor rather than a partisan power.

Qatar's global role thus mirrors its regional strategy of niche dominance, contractual leverage, and reputational centrality, rather than broad-spectrum leadership.

7.4. From Regional Competition to Global Governance Influence

Taken together, these different forms of global outreach reveal a critical shift: that Gulf competition now structures debates well beyond MENA.

- In multilateral finance, Saudi Arabia presses for reform and a greater voice for the New South;
- In climate governance, the UAE reframes transition debates around pragmatism and capital mobilization;
- In energy diplomacy, Qatar anchors global security through LNG lock-in.

These are not coordinated strategies. They are parallel, competitive pathways via which Gulf states insert themselves into global governance arenas. They often complement, but also sometimes undercut, one another. The result is not fragmentation, but pluralization: multiple Gulf-led entry points into global order-making.

8. Conclusion: The Gulf Triad in a Multipolar World

Saudi Arabia, the UAE, and Qatar are no longer unified by history, geography, or institutional habit. They are differentiated powers, each asserting a distinct vision of Arab leadership and global relevance, in a world defined by fragmentation, uncertainty, and multipolar competition.

Their rivalry is not destabilizing by default. It is structural and systemic, rooted in competing models of geoeconomic power:

- Saudi Arabia pursues sovereign scale, institutional reform, and strategic autonomy;
- The UAE advances platform power, climate pragmatism, and global intermediation;
- Qatar cultivates contractual indispensability, niche dominance, and diplomatic centrality.

Together, they form a new Gulf triad that is reshaping regional politics, while extending its influence into global governance debates on trade corridors, energy security, the climate transition, and multilateral finance.

For MENA and the Global South, this tripartite power structure presents both opportunity and risk. Gulf capital, infrastructure, and diplomacy offer alternatives to declining Western engagement, but also introduce new asymmetries, dependencies, and competitive pressures. Navigating this landscape will require strategic literacy: understanding not only what the Gulf offers, but which Gulf model one is engaging with.

In the emerging multipolar century, power will be exercised less through ideology and more through ports, balance sheets, contracts, and convening authority. Few regions illustrate this transformation more clearly than the Gulf. Its three-way competition is not a footnote to the global order, but one of the arenas in which that order is being actively rewritten.

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À PROPOS DE L'AUTEUR

FERID BELHAJ

Ferid Belhaj took up the position of World Bank Vice President for Middle East and North Africa on July 1, 2018. Prior to this, he served as the Chief of Staff of the President of the World Bank Group for 15 months.From 2012 to 2017, Mr. Belhaj was World Bank Director for the Middle East, in charge of work programs in Lebanon, Syria, Jordan, Iraq and Iran, based in Beirut, Lebanon. In this capacity, he led the Bank's engagement on the Syrian refugee crisis and its impact on the region, including the creation of new financing instruments to help countries hosting forcibly displaced people; the ramping up of the Bank drive towards the reconstruction and recovery of Iraq during and after the ISIS invasion and the scaling up of the Bank's commitments to Lebanon and Jordan.

Before taking up his Mashreq assignment, Mr. Belhaj served as World Bank Director for the Pacific Department (2009-2012), where he developed a regional strategy that scaled up Bank engagement in small and fragile states, and tripled lending operations of the International Development Agency, one of the five institutions under the umbrella of the World Bank Group that provides interest-free loans and grants for Low-Income Countries. From 2007 to 2010, Mr. Belhaj was the World Bank's Special Representative to the United Nations (UN) in New York, where he engaged with various UN agencies on a range of programs, mainly climate change, the Millennium Development Goals, fragile and post-conflict states and the global financial and food crises.

À PROPOS DU POLICY CENTER FOR THE NEW SOUTH

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Le PCNS défend le concept d'un « nouveau Sud » ouvert, responsable et entreprenant ; un Sud qui définit ses propres narratifs, ainsi que les cartes mentales autour des bassins de la Méditerranée et de l'Atlantique Sud, dans le cadre d'un rapport décomplexé avec le reste du monde. Le think tank se propose d'accompagner, par ses travaux, l'élaboration des politiques publiques en Afrique, et de donner la parole aux experts du Sud sur les évolutions géopolitiques qui les concernent. Ce positionnement, axé sur le dialogue et les partenariats, consiste à cultiver une expertise et une excellence africaines, à même de contribuer au diagnostic et aux solutions des défis africains.

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