

# Implications of the US presidential election for the GCC



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*The US elections present the GCC countries with potential challenges regardless of the outcome. On balance, the Gulf states would prefer a Donald Trump victory because it is easier to deal with an incumbent leader, who, despite being transactional and capricious, is still committed to the view that Saudi Arabia and the other GCC states are strategic allies and that the US has vital interests in the region that need protecting.*

## Trump vs. Biden

A victorious Trump will insist that in return for maintaining strong relations the Gulf states must continue purchasing weapons, make investments in America, pay for US military assistance, limit oil production to help the US energy industry, and establish more open ties with Israel. Unlike Trump, Joe Biden--as his principal advisor Anthony Blinken has indicated--will be guided by a return to the Obama policy of appeasing Iran, restricting arms sales to the GCC, insisting on a quick end to the war in Yemen and, finally, the upholding of human rights, especially for women. Whatever the outcome of the election, and despite their differences, both Republicans and Democrats will also have to accommodate an American public that is exhausted by overseas military interventions and seeks to diminish the US's global footprint, in particular in the Middle East. The GCC countries will have to contend with all these competing views and demands.

America's isolationist impulse is reinforced by the public's view that the US has become energy self-sufficient because of the shale oil and gas revolution of the last decade--the dominant feeling is that the Middle East's energy reserves have become unnecessary for America's economic wellbeing. This is a mistaken assessment since oil remains a globally priced commodity and Middle Eastern production--in particular the volume of output from the GCC--remains vital to the welfare and survival of US producers as well as to the stability of the global economy. The oil price crisis in March 2020 illustrated this point well with the result that Trump had to appeal, repeatedly, to Saudi Arabia to cut production to help save the US energy industry. Like Trump, Biden also understands this fundamental feature of energy markets and will therefore be cautious not to alienate the Kingdom and its Gulf allies. Still, America's isolationist impulse

is getting stronger and in practice this will mean that the US will be a less reliable partner for the GCC regardless of who is in power in the White House.

## Congress

The November election is not only about the fate of the presidency. Which political party gains a majority in Congress will also have consequences on American policies toward the GCC. For instance, a Democrat majority in the Senate will certainly lead to considerable pressure to restrict arms sales to the GCC countries as well as to insist on human rights as an important element in foreign policy. The Democrats are also more likely to side with Qatar, which has cultivated them very actively since 2017. Whereas the continuation of a Republican majority in the Senate will mean that such restrictions and pressures will not be exerted. In short, Republicans are stronger supporters of maintaining robust bilateral ties with the GCC countries, and they are more vigilant about containing Iran and restricting Russian and especially Chinese influence in the Gulf.

## Iran

President Trump's principal advisors on the Gulf and Iran—Jared Kushner, Mike Pompeo and Elliot Abrams—are all strong advocates of closer relations with the GCC and are hawks when it comes to Iran. Yet, Trump might still try to obtain a meeting with the Iranian president, mainly as a publicity stunt—his public image as an international negotiator remains a top priority. Even so, without a renegotiated and broad agreement with Iran, one that goes beyond the nuclear issues, Trump will not lessen the economic sanctions against Tehran. Iran will have to provide substantive concessions in a revamped deal of the nuclear agreement (JCPOA). Such concessions would involve, in addition to more restrictions on the nuclear program, limitations on ballistic missile production as well as drone and cruise missiles, and a reduction of support for proxy groups around the region (e.g., the Houthis and Hezbollah). All this will involve high sacrifices for Iran and thus a new deal with Trump is very unlikely to be concluded.

Similarly, a quick resumption of the JCPOA deal between Iran and the Democrats cannot be taken

as a given. Although the Democrats wish to re-join the JCPOA, doing so will not be easy because Iran will insist on a new set of conditions that Biden cannot simply agree to. First, Iran will demand a form of reparations to compensate for the punitive regime it had to endure under Trump. The Iranian Revolutionary Guard Corps (IRGC), which is poised to take over fully the regime in Tehran, will insist on this. Second, Iran is perceived by many Americans as having negotiated the nuclear deal in bad faith. It used the funds it received from the Obama administration to entrench further its influence and domination over Iraq, Syria, Lebanon and parts of Yemen. In each of these it has spent billions of dollars supporting its proxies, providing weapons and training. Furthermore, Tehran has continued to develop its missile and drone programs, whose remarkable efficacy and destructiveness was on full display during the 14 September 2019 attack on the Saudi oil installations. And while it can be argued that Iran has done all this to protect itself from American, Israeli and Saudi hostility, it is broadly identified in the US as a destabilizing actor in the region and with a clear aim to see the US withdraw completely from the Gulf. Biden will not be able to pretend, as the Obama administration often hinted, that a renewed agreement will help change the nature of the Mullah's regime. And this is all the more so as the IRGC openly becomes the dominant actor in Tehran.

## The UAE, Bahrain and Israel Agreements

The recent agreements to establish a formal relationship between Israel and the UAE as well as with Bahrain are widely perceived as a gift for Trump since he can claim this as a foreign policy win before the November elections. However, these agreements are also supported by Biden since any US president must be in favour of normalization and peace between Arab countries and Israel. These agreements are ultimately driven by the state and security interest of the Gulf states and Israel and not by US electoral considerations. These countries want to break with the paralyzing political dynamics of the past—those centred on Arab nationalism, resistance to the West and the Palestinian cause—and wish to build a prosperous future based on commerce, technological innovation, and mutual security. This breakthrough also has the tacit blessing of Saudi Arabia and represents a major development for the region. Other countries such as Oman are likely to follow in the UAE and

Bahrain's footsteps, although not Saudi Arabia because of its status as global Muslim leader and because its own population is not ready for such a dramatic change in foreign policy. These agreements bring into the open the split between the major countries of the Middle East. On one side are Turkey, Iran and Qatar all hoping that the forces of Islamism and anti-Westernism will prevail, despite the significant differences between them. On the other side are the UAE, Bahrain, Israel, Saudi Arabia

as well as Jordan and Egypt who wish to maintain American hegemony over the region. If Trump wins, the pro-American side led by Israel and the UAE will be given a huge boost and the divisions between the two camp will become more prominent. One consequence of this is that Turkey and Qatar will be pressurized by Trump to choose sides. A Democratic win is likely to give the Turkish and Qatari-led camp more leeway to continue pursuing their Islamist policies.

## *The Way Forward (the Biden hedge)*

A Biden victory will mean that America will become a less reliable ally for the GCC countries, especially for Saudi Arabia, and the US will generally reduce its involvement in the Middle East. This could spell greater instability for the region. It is not a coincidence that the Obama period was accompanied by the period of greatest chaos in the region—the Arab Spring and its effects—and this was in part because Obama signalled a reduction of involvement by the US in the region's affairs. A similar dynamic under Biden will strengthen the already existing policies of Gulf states to hedge their position by diversifying their international relationships, in particular with China. The regimes' security and survival will become an even greater priority. More than increased commercial relations with China, we will see even more weapons systems being bought from China and joint manufacturing of these in the Gulf, as well as greater collaborations on major infrastructure projects such as nuclear and solar power and the mining of minerals. The Chinese are already in the enviable position of having both Iran and the GCC bidding for greater cooperation and exchange while the US sees its influence receding.

A Biden administration, which resumes negotiations with Iran, will put pressure on Saudi Arabia to end the war in Yemen as well as restrict arms sales. This is one reason why an immediate Saudi push to end the war in Yemen will help pre-empt the Democrats. This can help create an opening for Riyadh to cultivate the Democrats who feel resentful by the exclusive relationship Saudi Arabia has fostered with Trump. The release of political prisoners before the election in November is also another way to pacify the Democrats and other critics in the West. Of course, a Saudi agreement with Israel before the November elections would force the Democrats to adopt a more positive policy vis-à-vis the Kingdom, but this is unlikely to happen for the reasons mentioned earlier. As a rule, it is always best for the GCC countries not to be identified too closely with one party in the US but instead to try to cultivate bi-partisan support. The November election offers an opportunity to do just this—build constituencies across the political divide in America that see long-term value in maintaining robust and strategic relations with the GCC.

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