Saudi Arabia Comes into Its Own

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The announcement—followed by the last-minute cancellation—of an attack on Iran, at a time when the country was being shaken by protests of unprecedented масшта, highlighted a major strategic shift in the Middle East. According to several converging sources, Saudi Arabia, the United Arab Emirates (UAE) and Qatar reportedly pressed President Trump to abandon the operation, even going so far as to deny access to their airspace. Such a stance was surprising: should these Sunni monarchies not have welcomed the weakening of their Iranian rival? Instead, they deliberately chose restraint.

This reversal can be understood only in light of the Gulf's geopolitical architecture shaped in the aftermath of the Second World War. Fearing a Soviet breakthrough in Iran that could jeopardize oil supplies to Western economies, Washington elevated the Shah's Iran to the status of a regional pillar from the 1950s onward, supplying it with cutting-edge weaponry such as F-14 fighter jets. At the time, a strong Iran served as a strategic bulwark against Moscow's ambitions.

Saudi Arabia, for its part, found clear advantage in aligning with the United States. Under the 1945 agreement between U.S. President Franklin D. Roosevelt and King Ibn Saud, the kingdom's founder, the United States guaranteed the security of a demographically vulnerable realm and supported the ideological struggle against communist atheism. In return, Washington secured privileged access to Saudi oil and reinforced an international monetary order built on the recycling of petrodollars. This arrangement durably structured the global economy while accompanying Saudi Arabia's rapid modernization.

The Islamic Revolution of 1979 abruptly ended this balance. The fall of the Shah, the hostage crisis at the U.S. embassy in Tehran, and the branding of the United States as the "Great Satan" ushered in a phase of systemic confrontation. Iran's revolutionary rhetoric targeted Sunni monarchies, while Iraqi President Saddam Hussein—convinced of the new regime's fragility—launched a devastating war that claimed nearly one million lives.

Iraq's subsequent invasion of Kuwait, driven by its oil wealth, alarmed the Gulf monarchies, which feared a shift in the monopoly over petrodollars. Although Western powers liberated Kuwait in 1991, the Anglo-American invasion of Iraq in 2003 plunged the country into lasting chaos. By a cruel strategic paradox, Iraq then became an arena largely subject to Iranian influence.

The real turning point for Riyadh came in 2019, when Houthi rebels struck Saudi oil facilities, knocking out nearly half of the kingdom's production capacity. President Trump's refusal to respond militarily deeply shook Saudi confidence in the American security umbrella. From that moment, Riyadh began diversifying its strategic partnerships and defusing its direct confrontation with Tehran. The restoration of diplomatic relations with Iran in 2023, under Chinese auspices, consecrated this cautious realignment.

In a related vein, the removal of President Maduro in Venezuela helped weaken the Caracas–Tehran axis, while also frustrating China's ambitions to access Venezuelan oil and promote the yuan as a transaction currency at the expense of the dollar.

Saudi Arabia also sees itself surrounded by other sources of threat. The Muslim Brotherhood seeks to replace existing regimes with Islamist governments; it is backed by Qatar and encouraged by Turkey. For Riyadh, this movement remains a persistent concern. Moreover, President Erdoğan has not hesitated to invoke Ottoman heritage over Mecca and Medina, implicitly questioning Saudi legitimacy as custodian of Islam's holy sites. Added to this is an increasingly pronounced rivalry with the UAE, particularly in Yemen, where Abu Dhabi supports separatist forces while Riyadh backs the internationally recognized government.

In this context, the Saudi objective—shared by Qatar and the UAE—is less the downfall of the Iranian regime than the preservation of a fragile status quo: an Iran that is contained and weakened, but not plunged into chaos. An open war would be fraught with consequences. Tehran could target energy infrastructure and close strategic chokepoints such as the Strait of Hormuz in the Persian Gulf or Bab el-Mandeb in the Red Sea, triggering a paralysis of the global economy.

It is within this logic that discreet talks with Israel have taken place, aimed at linking Saudi Arabia to Israeli energy networks in order to route Saudi oil overland to Europe. Israel, for its part, also seeks to reduce its strategic dependence on Washington, buoyed by its high-tech exports and new gas resources in the eastern Mediterranean. Turkey, however, is working to reroute the proposed Saudi pipeline through its own territory rather than via Israel. This initiative appears to meet some receptivity in Riyadh, although the Ankara–Doha axis—promoter of the Muslim Brotherhood—remains unacceptable in Saudi eyes.

The regional landscape thus appears exceedingly complex. Alliances are being reshuffled, ideological divides are softening, and national interests are taking precedence over sectarian reflexes. Hovering above this unstable chessboard is an additional variable: the persistent unpredictability of President Trump. Yet amid this fluidity, one certainty stands out: Saudi Arabia is no longer merely an aligned actor, but a regional power determined to chart its own course.