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# Implications of a Security Pact with Saudi Arabia

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# Executive Summary

The Biden administration is seeking a deal in which Saudi Arabia would extend full diplomatic recognition to Israel in exchange for the United States providing Saudi Arabia a security guarantee, assistance in developing a nuclear program, and more unrestricted arms sales. Such an arrangement would further enmesh the United States in Middle Eastern disputes and intensify regional divisions. It would work against a favorable pattern of regional states working out their differences when the United States leaves them on their own – illustrated by the Chinese-brokered détente between Saudi Arabia and Iran.

Besides being an authoritarian state lacking shared values with the United States, Saudi Arabia under Mohammed bin Salman (MBS) has aggressively pursued regional dominance, most notably with its highly destructive war in Yemen. A U.S. security guarantee could motivate MBS to engage in even riskier behavior and draw the United States into conflicts in which it has no stake, such as the sectarian dispute that had led Saudi Arabia to break relations with Iran.

An expanded Saudi nuclear program would have a military as well as an energy dimension, with MBS having openly expressed interest in nuclear weapons. Granting the Saudi demand for help in enriching uranium would be a blow to the global nonproliferation regime as well as a reversal of longstanding U.S. policy. A race in nuclear capabilities between Iran and Saudi Arabia may result.

Meeting MBS' demands would not curb Saudi relations with China, which are rooted in strong economic and other interests. The United States could compete more effectively with China in the region not by taking on additional security commitments but instead

by emulating the Chinese in engaging all regional states in the interest of reducing tensions.

Normalization of diplomatic relations between Israel and Saudi Arabia would not be a peace agreement, given the already extensive security cooperation between them. Even the gift of normalization with Riyadh would be unlikely to soften Israel's hard-line positions regarding the war in Gaza and the larger Israeli-Palestinian conflict, and instead would only reduce further Israeli motivation to resolve that conflict.

## Background

Much of the impetus for a possible security agreement with Saudi Arabia comes from the Trump administration's brokering of upgraded ties between Israel and several Arab states. The upgrading to full diplomatic relations initially involved the United Arab Emirates,<sup>1</sup> with Bahrain, Morocco, and Sudan following suit. This development represented a departure from the Arab League peace initiative, which has been on the table since 2002 and offers full relations with Israel provided that it ends the occupation of Palestinian territories and permits establishment of a Palestinian state.<sup>2</sup>

The Trump administration's moves also set a precedent of the United States making substantial side payments to the Arab regimes involved as inducement for moving to full relations with Israel. The regimes were motivated at least as much by what they were getting from the United States as by anything they may have hoped to get from Israel. For the United Arab Emirates, for example, the principal side payment was a promise by the U.S. to provide F-35 fighter aircraft and MQ-9 Reaper drones, which, if fulfilled, would make the UAE the first Arab country to receive either of these advanced U.S.-made systems.<sup>3</sup> For Morocco, the benefit the United States bestowed was to break

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<sup>1</sup> Abraham Accords Peace Agreement: Treaty of Peace, Diplomatic Relations and Full Normalization Between the United Arab Emirates and the State of Israel, September 15, 2020, <https://trumpwhitehouse.archives.gov/briefings-statements/abraham-accords-peace-agreement-treaty-of-peace-diplomatic-relations-and-full-normalization-between-the-united-arab-emirates-and-the-state-of-israel/>.

<sup>2</sup> The Arab Peace Initiative, March 28, 2002, <https://unsco.unmissions.org/sites/default/files/api.pdf>.

<sup>3</sup> Grant Rumley, "Unpacking the UAE F-35 Negotiations," Washington Institute for Near East Policy, February 15, 2022, <https://www.washingtoninstitute.org/policy-analysis/unpacking-uae-f-35-negotiations>.

with an international consensus by recognizing Moroccan sovereignty over the disputed territory of Western Sahara.<sup>4</sup>

The Trump administration announced the upgrading of relations between Arab states and Israel with much fanfare, giving the deals the august title of “Abraham Accords.” But Saudi Arabia was the big fish that had not yet been caught. Achieving Saudi-Israeli normalization became an early Middle East priority of the Biden administration.<sup>5</sup> Gaining Riyadh’s agreement has necessitated a downplaying of President Biden’s earlier sharp criticism of the Saudi regime’s human rights record; as a presidential candidate, he had promised to treat that regime as a “pariah.”<sup>6</sup>

In addition to the hoped-for normalization of relations with Israel, the impact on world energy markets of Russia’s invasion of Ukraine in February 2022 and subsequent sanctions on Russia added another objective the administration would seek from Riyadh. The war and sanctions caused prices of oil and gas to rise, contributing to a spike in inflation in the United States as well as in Europe, with adverse domestic political consequences. Getting Saudi help in stabilizing oil prices was one purpose of President Biden’s trip to Saudi Arabia in July 2022, in which he met with the de facto Saudi ruler, Crown Prince Mohammed bin Salman (MBS).<sup>7</sup>

Although the results regarding cooperation on oil were mostly disappointing, the idea of trading normalization with Israel for U.S. favors to Saudi Arabia was still in play. MBS has made clear that those favors would have to go beyond what had been offered to other Arab states. MBS’s demands include a formal security guarantee from the United

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<sup>4</sup> Proclamation on Recognizing the Sovereignty of the Kingdom of Morocco over the Western Sahara, December 10, 2020, <https://ma.usembassy.gov/proclamation-on-recognizing-the-sovereignty-of-the-kingdom-of-morocco-over-the-western-sahara/>.

<sup>5</sup> Jacob Magid, “US says It Wants to Push Israel-Saudi Pact, but only if Riyadh Honors Its Values,” *Times of Israel*, March 2, 2021, <https://www.timesofisrael.com/us-says-it-wants-to-push-israel-saudi-pact-but-only-if-riyadh-honors-its-values/>.

<sup>6</sup> Alex Emmons, Aida Chávez, and Akela Lacy, “Joe Biden, in Departure from Obama Policy, Says He Would Make Saudi Arabia a ‘Pariah,’” *The Intercept*, November 21, 2019, <https://theintercept.com/2019/11/21/democratic-debate-joe-biden-saudi-arabia/>.

<sup>7</sup> Hesham Alghannam and Mohammad Yaghi, “Biden’s Trip to Saudi Arabia: Successes and Failures,” *Sada*, August 11, 2022, <https://carnegieendowment.org/sada/2022/08/bidens-trip-to-saudi-arabia-successes-and-failures>.

States, along with assistance in developing a civilian nuclear program and a lessening of restrictions on U.S. arms sales to Saudi Arabia.<sup>8</sup>

Although a deal may have been close as of mid-2023, increasing Israeli-Palestinian violence in the occupied territories made it difficult for any Arab ruler – even an authoritarian one, such as MBS – to make what would be seen as a friendly gesture toward Israel. The Hamas attack on Israel on October 7 and the subsequent devastating Israeli assault on the Gaza Strip appeared to shelve the idea altogether.

The Biden administration, rather than abandoning the concept, repurposed it. While retaining its other objectives, it would try to use the prospect of normalization with Saudi Arabia – a prize valued by Israel – as leverage on the Israeli government. The objectives would be to get Israel to moderate the military operations that had turned the Gaza Strip into a humanitarian catastrophe and to take meaningful steps toward resolving the Israeli-Palestinian conflict with a two-state solution.<sup>9</sup>

Given the right-wing Israeli government's strong opposition to restricting its military operations in Gaza and its even stronger opposition to a two-state solution, some recent speculation has envisioned the United States and Saudi Arabia proceeding with a separate deal – including a U.S. security guarantee – as a framework for later hoped-for Israeli participation. This possibility cannot be ruled out, although Saudi-Israeli diplomatic normalization is still the administration's prime objective. Moreover, involvement of Israel may be necessary for securing any required congressional approval for a security deal with Riyadh.

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<sup>8</sup> Michael Crowley, Vivian Nereim, and Patrick Kingsley, "Saudi Arabia Offers Its Price to Normalize Relations with Israel," *New York Times*, March 9, 2023, <https://www.nytimes.com/2023/03/09/us/politics/saudi-arabia-israel-united-states.html>.

<sup>9</sup> Matthew Petti, "Biden Says He's Pushing a 2-State Solution. Let's Put Him to the Test." *Responsible Statecraft*, January 30, 2024, <https://responsiblestatecraft.org/biden-israel-palestine/>.

## Oil and national security in U.S.-Saudi relations

The inclusion of the oil issue in President Biden's trip to Saudi Arabia harked back to the beginning of U.S.-Saudi relations, when President Franklin Roosevelt met with the founder of the Saudi kingdom, Abdul Aziz ibn Saud, on a U.S. destroyer in the Suez Canal during the closing months of World War II. Getting American companies access to the major oil discoveries in Saudi Arabia was a prime U.S. objective at the time. But the situation regarding oil has changed greatly since then – especially given the fracking revolution in the United States. The United States currently gets only 5 percent of its petroleum imports from Saudi Arabia and is a net exporter of petroleum, with the difference between exports and imports being four times the amount of oil it gets from Saudi Arabia.<sup>10</sup>

The importance of exports of oil from Saudi Arabia and other Persian Gulf states thus is not to be measured in terms of privileged access for U.S. companies. Rather, the importance lies in the role of the Persian Gulf in the world oil trade, any disruption of which can have economic repercussions throughout the world, including in the United States. An implication is that a special relationship, or an exchange of favors, with Saudi Arabia or any other single producer is not what promotes energy and economic security for the United States. Rather, the objective should be to foster peace and stability in the Persian Gulf region, to minimize the risk of economically damaging disruptions. Conversely, anything that sharpens lines of conflict and tends to divide the region into confrontational blocs would increase that risk.

Other than oil, Saudi Arabia has little or nothing to offer the United States in terms of security. Although a prospective security deal might be described as a “mutual” security treaty or agreement, it would really be a one-way proposition, with the United States the giver and the Saudi regime the receiver of security.

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<sup>10</sup> U.S. Energy Information Administration, “How Much Petroleum Does the United States Import and Export?” March 29, 2024, <https://www.eia.gov/tools/faqs/faq.php?id=727&t=6>.

## *Other than oil, Saudi Arabia has little or nothing to offer the United States in terms of security.*

At some other times and places, a U.S. security tie with a weaker partner might have provided the United States with a platform for dealing effectively with a threat that was of concern to the United States as well as the partner. But any significant U.S. military presence in Saudi Arabia has already been shown to be a liability for the United States, not an asset, and to increase rather than decrease threats to U.S. interests. The deployment of U.S. troops to Saudi Arabia during Operation Desert Shield – in preparation for expelling Iraqi forces from Kuwait in 1991 – was one of the main factors that radicalized Osama bin Laden, the founder of al-Qaida.<sup>11</sup>

Several years later, in 1995, a different group of terrorists bombed the Khobar Towers compound in eastern Saudi Arabia, killing 19 U.S. airmen in their living quarters. Most U.S. forces then in Saudi Arabia subsequently were moved to a more remote airbase and later relocated to Qatar. The approximately 2,600 U.S. military personnel performing support functions in Saudi Arabia are there, according to the official rationale, “to protect United States forces and interests in the region against hostile action by Iran and Iran-backed groups.”<sup>12</sup> That the U.S. interests in the region most vulnerable to hostile action are U.S. military forces leads to the circular reasoning that U.S. troops are deployed to protect deployed U.S. troops.

As for counterterrorism cooperation with Saudi Arabia, such cooperation has not resulted from any special relationship or as a quid pro quo for favors that Washington grants to Riyadh. Instead, it has been a function of whether the Saudis see themselves as targets of terrorism. For many years, Saudi Arabia was a big part of the terrorism problem and not at all a part of the solution – even to the extent that Saudi officials

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<sup>11</sup> Abdel Bari Atwan, “Why bin Laden Was Radicalized,” CNN, May 17, 2011, <https://www.cnn.com/2011/OPINION/05/17/osama.bin.laden.al.qaeda/index.html>.

<sup>12</sup> Letter to the Speaker of the House and President Pro Tempore of the Senate on War Powers Report, June 8, 2023, <https://www.whitehouse.gov/briefing-room/statements-releases/2023/06/08/letter-to-the-speaker-of-the-house-and-president-pro-tempore-of-the-senate-on-war-powers-report/>.

appear to have aided some of the 9/11 hijackers.<sup>13</sup> The Saudi regime got serious about counterterrorism, and began effective cooperation with the United States, only after a series of bombings in Riyadh in 2003 convinced the Saudis that they could be victims of international terrorism too.<sup>14</sup>

## The multiple azimuths of Saudi foreign policy

Mohammed bin Salman is an authoritarian ruler who feels no ideological kinship with Western democracy. To the extent he shares thinking about governance with any foreign states, it is with other authoritarian regimes. His foreign policy is one of taking what he can get from any direction, regardless of ideology.

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Like many states in what is loosely called the Global South, Saudi Arabia resists choosing between East and West, or between major powers generally. The Saudi regime seeks to remain uncommitted and to extract what it wants from each side. MBS does not look on any one agreement with an outside power as implying a Saudi obligation to take sides on other matters.

A frequently cited rationale, as mentioned by President Biden<sup>15</sup> and others, for fostering a close relationship with Saudi Arabia is to compete with China for influence in the Middle East. But the already extensive Saudi-Chinese relationship is rooted in major Saudi economic and other interests and is unlikely to change appreciably because of any new agreements with the United States.

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<sup>13</sup> Daniel Benjamin and Steven Simon, "New 9/11 Evidence Points to Deep Saudi Complicity," *The Atlantic*, May 20, 2024, <https://archive.ph/tnoqC>.

<sup>14</sup> Christopher Boucek, "Saudi Arabia Aligns with US to Rout Al-Qaeda Operatives," Royal United Services Institution, November 19, 2007, <https://rusi.org/publication/saudi-arabia-aligns-us-rout-al-qaeda-operatives>.

<sup>15</sup> Joe Biden, "Why I'm Going to Saudi Arabia," *Washington Post*, July 9, 2022, <https://www.washingtonpost.com/opinions/2022/07/09/joe-biden-saudi-arabia-israel-visit/>.

Saudi Arabia is China's biggest source of petroleum, and China buys more Saudi oil than anyone else. Saudi Arabia is China's largest trading partner in the Middle East, and China is Saudi Arabia's biggest trading partner overall. China also is an important investor for MBS' ambitious plans for economic development beyond oil, labeled Saudi Vision 2030.

<sup>16</sup> Many of the projects in those plans mesh naturally with China's Belt and Road Initiative.<sup>17</sup>

China also has been forthcoming with Saudi Arabia on some military matters, dating to its sale of intermediate-range ballistic missiles in a deal that was struck in 1986 and only became known in the West two years later.<sup>18</sup> This transaction occurred long before talk about the United States exiting the Middle East and leaving a "vacuum." Today, China is assisting Saudi Arabia in building its own solid-fuel ballistic missiles.<sup>19</sup>

A major attraction for the Saudi regime of dealing with China on either economic or military matters is that Beijing pays no attention to the human rights deficiencies of its partner countries. In contrast, it was the Saudi regime's human rights violations, such as the murder of dissident journalist Jamal Khashoggi, that largely underlay Joe Biden's earlier posture of treating Saudi Arabia as an outcast.

To the extent that the Saudi regime takes heed of sentiment among its citizens, China is favored as well. The relevant sentiments probably reflect a sense among ordinary Saudis that, while the United States deals with scary topics such as security threats, China is doing things that may improve their way of life. An opinion poll in 2022 showed that only 41 percent of Saudis considered good relations with the United States to be

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<sup>16</sup> Layla Ali, "Saudi Arabia Developing a Partnership with China," Gulf Research Center, October 18, 2022, <https://www.grc.net/single-commentary/66>.

<sup>17</sup> Ishtiaq Ahmad, "Saudi Arabia and China Linked by Shared Interests, a Promising Future," *Arab News*, December 7, 2022, <https://www.arabnews.com/node/2212521>.

<sup>18</sup> Federation of American Scientists, *Intelligence Resource Program: Saudi Arabia*, September 12, 1996, <https://irp.fas.org/threat/missile/saudi.htm>.

<sup>19</sup> Zachary Cohen, "US Intel and Satellite Images Show Saudi Arabia Is now Building Its Own Ballistic Missiles with help of China," CNN, December 23, 2021, <https://www.cnn.com/2021/12/23/politics/saudi-ballistic-missiles-china/index.html>.

“very important” or “somewhat important,” while the comparable figure for relations with China was 55 percent and with Russia 52 percent.<sup>20</sup>

Saudi Arabia’s relationship with Russia is less extensive than with China, simply because Russia has less to offer, but the relationship has grown in recent years. The principal shared interest between Riyadh and Moscow is to maximize oil revenues, a goal they address primarily through the OPEC Plus forum.<sup>21</sup>

For Saudi Arabia, the United States is one more outside power to deal with on a transactional basis, with MBS seeking to get as much as possible while giving up as little as possible. In this regard, MBS probably sees himself in a strong bargaining position. He is in no hurry to reach a deal and can cite the popular anger over the disaster in the Gaza Strip as a reason to go slow in any agreement that involves normalization with Israel. Normalization, moreover, is a card that MBS knows he can play only once.

At the same time, MBS probably perceives President Biden as being anxious for a deal. There already has been the remarkable turnaround in Biden’s posture from talk about treating Saudi Arabia as a “pariah” to talk about providing it a security guarantee. MBS probably sees the situation in Gaza and the domestic political problems this is causing for the president as making the U.S. administration all the more eager to conclude an agreement. In short, MBS has ample reason to drive a hard bargain.

## Saudi responses to a security pact

The foregoing suggests that any U.S.-Saudi deal probably will be more explicit about U.S. security commitments to the kingdom than about any hoped-for changes in Saudi policies regarding such things as relations with China or oil production levels. In any

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<sup>20</sup> Poll conducted in July and August 2022 by the Washington Institute for Near East Policy, <https://www.washingtoninstitute.org/policy-analysis/2022-polls-views-us-relations-par-other-world-powers-middle-east>.

<sup>21</sup> Amin Saikal, “Saudi Arabia and Russia Have the West over a Barrel,” *The Strategist*, October 11, 2023, <https://www.aspistrategist.org.au/saudi-arabia-and-russia-have-the-west-over-a-barrel/>.

event, those Saudi policies will continue to be determined more by other Saudi interests and motivations.

The kingdom of Saudi Arabia has maintained its independence and control over its territory for all of its nearly century-long existence without something like a mutual security treaty with the United States. This raises the question of why MBS nonetheless sees value in such a pact. Part of the answer lies in the anomaly of an absolute hereditary monarchy ruling over a supposedly modernizing state in the twenty-first century. Realizing the inherent instability of that combination, any Saudi ruler would welcome a diplomatic hug from the superpower as a way to help extend the anomaly. Saudi Arabia is seeking a security pact now because a combination of circumstances involving Gaza, oil, and domestic U.S. politics appear to have brought such a pact within reach.

Another part of the answer concerns the increasingly assertive Saudi regional policy, which began before MBS came to power but that he has accentuated. In recent years, Saudi Arabia has been second only to Israel among regional powers in the scale with which it has used military force beyond its own borders. That use has included a military intervention in Bahrain in 2011 to prop up an unpopular Sunni regime in a majority Shi'a country.<sup>22</sup> Most of all, it has included the Saudi war in Yemen, which began in 2015 not because of any Yemeni attacks on Saudi Arabia but instead to reinstall a Yemeni regime that had been ousted from the capital by the Houthi rebellion and that would be beholden to the Saudis. The Saudi air war accounted for much of the destruction that turned Yemen into one of the largest nonnatural humanitarian disasters of recent years.<sup>23</sup> Even without a security treaty, the United States got partly sucked into the conflict by

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<sup>22</sup> Ethan Bronner and Michael Slackman, "Saudi Troops Enter Bahrain to Help Put Down Unrest," *New York Times*, March 14, 2011, <https://www.nytimes.com/2011/03/15/world/middleeast/15bahrain.html>.

<sup>23</sup> USA for UNHCR, "Yemen Crisis Explained," March 21, 2024, <https://www.unrefugees.org/news/yemen-crisis-explained>.

providing intelligence and logistical support.<sup>24</sup> It probably would have become more extensively involved if a U.S.-Saudi security pact had been in force.

Despite frustrations in Yemen that have led the Saudis to pull back from their operations there, there is no reason to believe that MBS's larger regional ambitions have lessened. Those ambitions have been manifested not only in military interventions but also in the Saudi-led effort to use blockade and isolation to try to intimidate neighboring Qatar — host to a major U.S. military presence — into submission.<sup>25</sup> A risk to the United States is that a formal U.S. security commitment would make MBS feel even freer than before to make aggressive moves, comforted by the thought that the United States would back him if he got into trouble.

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The United States also needs to reflect on what sort of regime it would be protecting in concluding a security agreement with Saudi Arabia. The situation would not be at all comparable to, say, the establishment of NATO, which involved defending Western European democracies from Stalin's USSR, or the mutual defense treaty with South Korea, a democracy that faces a heavily armed totalitarian regime in the north that has not renounced its goal of gaining control over all of Korea. The United States does not share values with the authoritarian Saudi regime. Saudi Arabia does not even have an edge in shared values over neighboring states and possible adversaries; it is less

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<sup>24</sup> Joyce Sohyun Lee, Meg Kelly, and Atthar Mirza, "Saudi-led Airstrikes in Yemen Have Been Called War Crimes. Many Relied on U.S. Support," *Washington Post*, June 4, 2022, <https://www.washingtonpost.com/investigations/interactive/2022/saudi-war-crimes-yemen/>.

<sup>25</sup> Samuel Ramani, "The Qatar Blockade Is Over, but the Gulf Crisis Lives On," *Foreign Policy*, January 27, 2021, <https://foreignpolicy.com/2021/01/27/qatar-blockade-gcc-divisions-turkey-libya-palestine/>.

democratic than the limited democratic elements in Iran's political system. The absence of political rights in Saudi Arabia continues to be matched by the regime's serious offenses regarding other human rights.<sup>26</sup>

## Relations with Iran

A presumed threat from Iran is the repeatedly mentioned rationale for extending security commitments in Saudi Arabia or elsewhere in the Middle East. A specific incident often cited is an aerial attack on the Saudi oil facilities at Abqaiq and Khurais in September 2019, for which Houthis in Yemen claimed responsibility but was probably the work of Iran.<sup>27</sup> Saudi leaders were subsequently reported to be unhappy that the United States did not respond by attacking Iran.<sup>28</sup>

The most important fact about this episode is what came afterward: not some further attack on Saudi Arabia by an inadequately deterred Iran, but instead an Iranian-Saudi rapprochement. Several rounds of talks between the two Persian Gulf states culminated in March 2023 in a Chinese-mediated agreement to restore full diplomatic relations and to reactivate a lapsed security cooperation pact.<sup>29</sup> Both sides had strong pragmatic reasons for this détente despite lingering tensions between the two.<sup>30</sup> Iran wanted to solidify relations with all its neighbors and show that it was not isolated. Saudi Arabia wanted assurances against external attack while it concentrated on its Vision 2030 economic development plan. Both countries would be hurt by any conflict in the region that escalated in ways that would disrupt the oil trade.

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<sup>26</sup> U.S. Department of State, *2022 Country Reports on Human Rights Practices: Saudi Arabia*, <https://www.state.gov/reports/2022-country-reports-on-human-rights-practices/saudi-arabia/>.

<sup>27</sup> Humeyra Pamuk, "US Probe of Saudi Oil Attack Shows It Came from North," Reuters, December 19, 2019, <https://www.reuters.com/article/idUSKBN1YN29E/>.

<sup>28</sup> Jonathan Landay, Arshad Mohammed, and Humeyra Pamuk, "US Seeks to Mend Frayed Ties with Second High-Level Trip," Reuters, June 2, 2023, <https://www.reuters.com/world/us-seeks-mend-strained-saudi-ties-with-second-high-level-trip-2023-06-02/>.

<sup>29</sup> Vivian Nereim, "Saudi Arabia and Iran Agree to Restore Ties, in Talks Hosted by China," *New York Times*, March 10, 2023, <https://www.nytimes.com/2023/03/10/world/middleeast/saudi-arabia-iran-reestablish-ties.html>.

<sup>30</sup> Giorgio Cafiero, "Iranian-Saudi Deal: They Didn't Do It for Love," *Responsible Statecraft*, September 8, 2023, <https://responsiblestatecraft.org/china-iran-saudi-arabia/>.

The major lesson of this episode is that when the United States refrains from intervening in a local rivalry with either a military response or security promises, both sides involved have more of an incentive to work things out on their own. This is exactly the kind of outcome that is most in U.S. interests — essentially cost-free to the United States, with a reduction in the risk of a regional war.

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Conversely, for the United States to take sides in a way that reaccentuates divisions in the region would tend to undo this favorable development. Moreover, sharpening lines of conflict in a way that is aimed against Iran would not mean Iran would be content to endure isolation. Tehran could be expected to respond by tightening its relationships with Iraq, Syria, and Lebanon as well as militias and nongovernmental groups with which it has been associated. It also would depend more on its relationship with Russia, with everything that implies regarding the military supply relationship between Iran and Russia.

For an anti-Iran alliance with Saudi Arabia or any regional state to fill a U.S. need, it would have to be based on the concept of deterring some action that Iran would plausibly initiate and that would itself be against U.S. interests, rather than being an aspect of intraregional rivalry in which the United States has no stake. It is difficult to think of any such scenario. The same motivations that led Tehran to the rapprochement with Riyadh also constitute disincentives for it to initiate destructive and destabilizing actions. Iran, as a mostly Persian and Shi`a nation, faces the perennial challenge of trying to gain influence in a region that is mostly Sunni and Arab. In recent months it has

done so partly by quietly accepting in international organizations an Arab and Muslim consensus in favor of a two-state solution to the Israeli-Palestinian conflict.<sup>31</sup>

As for Iran possibly being the initiator of conflict, it should be noted that the 2019 attack on the Saudi oil facilities was not a bolt out of the blue. It followed the Trump administration's initiation of unrestricted economic warfare against Iran,<sup>32</sup> with the objective of reducing Iranian oil sales to zero.<sup>33</sup> The message that Iran was sending with the attack, and which it had been sending in less violent form in the preceding months, was that if Iran cannot export its oil, then other producers should not be assured of exporting theirs.

An indication of the type of conflict Iran and Saudi Arabia would be likely to get into if their current détente were to break down is the episode that led the two countries to sever relations in 2016. Saudi Arabia executed a prominent Shi'ite cleric who had been an outspoken proponent of the interests of Saudi Shi'a, whom the Sunni regime treats as second-class citizens.<sup>34</sup> The execution was widely condemned in the Arab world and elsewhere. In Tehran, a mob ransacked the Saudi embassy. The Saudi regime then broke diplomatic relations and expelled all Iranian diplomats from Saudi Arabia. Relations remained broken until the Chinese-brokered restoration last year. This is exactly the kind of conflict from which the United States has good reason to stay clear: an intra-Islam sectarian brawl, triggered by an act of domestic oppression by its would-be ally.

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<sup>31</sup> Javad Heiran-Nia, "Iran Tempers Rejectionism to Muslim Consensus on Palestine," Stimson Center, January 5, 2024, <https://www.stimson.org/2024/iran-tempers-rejectionism-to-muslim-consensus-on-palestine/>.

<sup>32</sup> CBS News, "Trump-Approved Economic Sanctions against Iran Hurt Average Iranians," June 24, 2019, <https://www.cbsnews.com/news/donald-trump-and-us-approved-economic-sanctions-against-iran-are-hurting-average-iranians-the-most/>.

<sup>33</sup> Ashish Kumar Sen, "A Look at the Implications of Trump's Decision to End Sanctions Waivers for Countries Importing Iranian Oil," Atlantic Council, April 22, 2019, <https://www.atlanticcouncil.org/blogs/new-atlanticist/trump-ends-sanctions-waivers-for-countries-importing-iranian-oil/>.

<sup>34</sup> Merrit Kennedy, "Who Was the Shiite Sheikh Executed by Saudi Arabia?" NPR, January 4, 2016, <https://www.npr.org/sections/thetwo-way/2016/01/04/461912757/who-was-the-shiite-sheikh-executed-by-saudi-arabia>.

## The nuclear dimension

A plausible case can be made for Saudi Arabia to look to nuclear power for some of its energy needs. The kingdom currently uses oil or gas to generate 99 percent of its electrical power. It consumes a quarter of its oil production for that and other domestic uses.<sup>35</sup> Saudi oil production will not grow to keep pace with growth of the country's population. It thus makes sense for the Saudis to develop new energy sources to reserve more of their oil and gas for foreign sales and the revenues that come from those sales.

The most logical alternative energy sources, however, are renewables: wind and especially solar. With plenty of bright sunshine and empty space on which to place solar panels, Saudi Arabia has one of the highest solar power potentials in the world.<sup>36</sup> MBS has talked about half the kingdom's energy coming from renewables by 2030, with solar power being part of his economic development plans. But so far Saudi Arabia has lagged badly behind other countries of comparable wealth in developing renewable energy.<sup>37</sup>

The Saudi regime's thinking in seeking U.S. help with a nuclear program – which would expand on what so far have been mostly exploratory steps – is partly about diversifying energy sources but almost certainly has a military dimension as well. MBS himself has more than once said publicly that Saudi Arabia would seek a nuclear weapon if it felt threatened.<sup>38</sup>

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<sup>35</sup> World Nuclear Association, "Nuclear Power in Saudi Arabia," March 28, 2024, <https://world-nuclear.org/information-library/country-profiles/countries-o-s/saudi-arabia>.

<sup>36</sup> World Bank, "Global Photovoltaic Power Potential by Country," June 22, 2020, <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/466331592817725242/global-photovoltaic-power-potential-by-country>.

<sup>37</sup> Nick Ferris, "Will Saudi Arabia Ever Make Good on Its Solar Ambitions?" *Energy Monitor*, May 3, 2023, <https://www.energymonitor.ai/tech/renewables/will-saudi-arabia-ever-make-good-on-its-solar-ambitions/>.

<sup>38</sup> Julian Borger, "Crown Prince Confirms Saudi Arabia Will Seek Nuclear Arsenal if Iran Develops One," *Guardian*, September 21, 2023, <https://www.theguardian.com/world/2023/sep/21/crown-prince-confirms-saudi-arabia-seek-nuclear-arsenal-iran-dev-elps-one>.

The most worrisome dynamic if the United States were to assist Saudi Arabia in nuclear development would involve the nuclear weapons potential of both Saudi Arabia and Iran. In signing the Joint Comprehensive Plan of Action<sup>39</sup> in 2015, Tehran demonstrated its willingness to close all paths to a possible nuclear weapon in return for sanctions relief, and it adhered to its commitments as long as the JCPOA was in force. But since the Trump administration renounced the JCPOA in 2018 and thus relieved Iran of those commitments, the picture has been much different. Iran's subsequent expansion of its nuclear program has reduced the "breakout time" in which Iran could produce one weapon's worth of weapons-grade fissionable material to as little as a week.<sup>40</sup>

MBS, in his most recent mention of Saudi Arabia possibly deciding to develop a nuclear weapon, specifically mentioned the possibility of Iran getting such a weapon as the trigger for such a decision.<sup>41</sup> Tehran also has dropped similar ominous hints. Kamal Kharrazi, an adviser to Supreme Leader Ali Khamenei, recently said that Iran has made no decision to build a nuclear weapon but would change its doctrine if it believed its existence was threatened.<sup>42</sup> Kharrazi was referring specifically to threats from Israel, but his comment suggests that Khamenei's earlier disavowals about nuclear weapons would not be a barrier to Iran acquiring such weapons.

A danger of the United States assisting Saudi Arabia with a nuclear program is that it would give rise to a race in nuclear capabilities between Saudi Arabia and Iran, possibly related to tensions on other issues. The perception by either Tehran or Riyadh that one of them was getting uncomfortably close to a nuclear weapon would stimulate the other to get close as well. It would be a classic security dilemma, with a nuclear tinge. Considering all the suspicions that are routinely directed at Iran and its nuclear

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<sup>39</sup> Text at <https://2009-2017.state.gov/e/eb/tfs/spi/iran/jcpoa/>.

<sup>40</sup> Paul K. Kerr, "Iran and Nuclear Weapons Production," Congressional Research Service, March 20, 2024, <https://crsreports.congress.gov/product/pdf/IF/IF12106>.

<sup>41</sup> "Mohammed bin Salman: We Aren't Proud of All of Our Laws in Saudi Arabia," Interview with Fox News, September 20, 2023, <https://www.foxnews.com/video/6337519179112>.

<sup>42</sup> Al Jazeera, "Iran Warns It Will Change Nuclear Doctrine if 'Existence Threatened,'" May 9, 2024, <https://www.aljazeera.com/news/2024/5/9/iran-warns-it-will-change-nuclear-doctrine-if-existence-threatened>.

activities, it would be natural for Iranian leaders to be just as suspicious of what the Saudis were up to.

*A danger of the United States assisting Saudi Arabia with a nuclear program is that it would give rise to a race in nuclear capabilities between Saudi Arabia and Iran.*

Several additional risks would follow from such a race. One would be a reversal of Saudi-Iranian détente and the creation of a more tense climate for handling any other issue involving those two states. Another is the danger of Israel taking military action. Israel has more than once attacked another state to try to preserve its regional nuclear weapons monopoly, and it has repeatedly threatened to do so again against Iran.<sup>43</sup> The Israeli government currently views Saudi Arabia as a partner in confronting Iran, but how it would view a Saudi Arabia that had become a threshold nuclear weapons state represents another dangerous uncertainty.

If Saudi Arabia and Iran were to get the bomb, the stakes of every dispute in the region, and every conflict with a chance of escalation, would become markedly higher. There also could be a further nuclear domino effect, such as with Turkey, where President Recep Tayyip Erdoğan has occasionally grumbled about what he regards as the unfairness of Turkey not having nuclear weapons.<sup>44</sup>

Even if none of these more severe scenarios materialized, for the United States to provide the nuclear assistance that MBS wants would be a blow against global nuclear nonproliferation. Presumably, there would be safeguards accompanying a Saudi deal, but safeguards can do only so much. (Saudi Arabia has stated an intention to update its current minimal safeguards agreement with the International Atomic Energy Agency, but

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<sup>43</sup> Arie Egozi, "Israelis Say They'll Attack Iran if Israel US Eases Sanctions," *Breaking Defense*, January 25, 2021, <https://breakingdefense.com/2021/01/israelis-say-theyll-attack-iran-if-us-eases-sanctions/>.

<sup>44</sup> Reuters, "Erdoğan Says It's Unacceptable that Turkey Can't Have Nuclear Weapons," September 4, 2019, <https://www.reuters.com/article/idUSKCN1VP2Q8/>.

it so far has not done so, nor does it subscribe to the IAEA's Additional Protocol, which provides for more intrusive inspection and monitoring.) Technical knowledge and many of the capabilities acquired in a civilian nuclear program can be reprogrammed for military purposes if earlier commitments are abandoned.

Of particular concern is the Saudi insistence on having a domestic capability to enrich uranium. If the United States were to accede to this request, it would depart from previous U.S. nonproliferation policy of refusing assistance to foreign capabilities to enrich uranium or reprocess nuclear fuel.<sup>45</sup> If a departure were made for the Saudis, it would be difficult for the United States to say no to others.

Granting this part of MBS's wish list would form a stark contrast with what the United States had done to Iran with the JCPOA. Far from assisting Iran with its capability to produce fissile material, the JCPOA restricted that capability. The JCPOA moved Iran farther away from a possible nuclear weapon; acceding to MBS's request would move Saudi Arabia closer to one.

## Israel and conflict with the Palestinians

Diplomatic normalization between Israel and Saudi Arabia would not be a peace agreement, any more than was the earlier upgrading of relations with other Arab states, none of which were waging war against Israel. Far from being at war with Israel, Saudi Arabia already has extensive cooperation with it, including on security measures. That cooperation has a long history, going back to making common cause in the Yemeni war of the 1960s.<sup>46</sup> More recently, Saudi Arabia has used Israel's spyware known as Pegasus, in an arrangement that MBS personally helped to set up.<sup>47</sup> Saudi Arabia also

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<sup>45</sup> Kelsey Davenport, "Saudi Push for Enrichment Raises Concerns," *Arms Control Today* 53, no. 9 (November 2023), <https://www.armscontrol.org/act/2023-11/news/saudi-push-enrichment-raises-concerns>.

<sup>46</sup> Bruce Riedel, "How to Understand Israel and Saudi Arabia's Secretive Relationship," Brookings Institution, July 11, 2022, <https://www.brookings.edu/articles/how-to-understand-israel-and-saudi-arabias-secretive-relationship/>.

<sup>47</sup> Ronen Bergman and Mark Mazzetti, "The Battle for the World's Most Powerful Cyberweapon," *New York Times*, January 29, 2022, <https://www.nytimes.com/2022/01/28/magazine/nso-group-israel-spyware.html>.

shared intelligence on Iran with Israel that aided defense against the retaliatory Iranian missile attack on Israel in April 2024.<sup>48</sup>

Whatever advantage the United States might hope to get from Saudi-Israeli cooperation (and not all such cooperation is in U.S. interests, as illustrated by the human rights abuses involved in the Saudi regime's use of Pegasus to target domestic dissidents), it can get now, without formal diplomatic relations between those two states. The significance of an upgrade to full diplomatic normalization would be the symbolic value this holds for Israel. For the United States, the significance would be as a gift to Israel of something the Israeli government desires.

Although the Biden administration sees that desire as a basis for leverage over Israel, understanding the consequences of normalization requires looking at *why* the Israeli government wants normalization with Riyadh. One reason is to use it as a basis for solidifying and making permanent an anti-Iran alliance. This furthers the Israeli foreign policy objective of promoting maximum antagonism toward, and isolation of, Iran – an objective that directs blame for anything wrong in the region toward Iran, deflects attention away from Israel's own actions, and weakens a competitor for regional influence. This Israeli stoking of unending tension with Iran is not in U.S. interests, especially when it directly undermines U.S. diplomacy (as it did during negotiation of the JCPOA). Anything that increases and sustains tensions in the Persian Gulf region carries the risk of escalation into war. And for the United States to be drawn ever more deeply into a three-way alliance with Israel and Saudi Arabia risks sucking it into conflicts that may serve objectives of either of those states but not the United States.

Another Israeli objective is to enjoy normal relations with other states in the region despite continuing its occupation of Palestinian territories, and to be seen by the world enjoying those relations. Normalization agreements with Arab states, far from being peace agreements, are, for Israel, about *not* making peace with the Palestinians. The net

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<sup>48</sup> Stuart Winer, "Report: Gulf States, including Saudi Arabia, Provided Intelligence on Iran Attack," *Times of Israel*, April 15, 2024, <https://www.timesofisrael.com/report-gulf-states-including-saudi-arabia-provided-intelligence-on-iran-attack/>.

effect would be to reduce even further any Israeli incentive to ever resolve the Israeli-Palestinian conflict.

The Biden administration's concept of leveraging the Israeli desire for normalization to get Israel to moderate its devastating offensive in the Gaza Strip or to move toward a two-state solution of the larger conflict runs up against strong Israeli obduracy on both these counts. A continuation of the assault that has inflicted enormous suffering on residents of the Gaza Strip reflects sentiments broadly held within Israel,<sup>49</sup> not only Israeli Prime Minister Benjamin Netanyahu's need to keep the operation going to avoid his political and legal difficulties. Netanyahu and his government have used increasingly strong and explicit language to reject any two-state solution.<sup>50</sup>

The Biden administration may attempt to square this circle with formulations that are vague enough to be sold as beneficial to the Palestinians but that Israel would not see as blocking its own objectives. The administration already has been moving toward such formulations publicly, as when National Security Adviser Jake Sullivan, speaking in early May, described the objective as "meaningful steps on behalf of the Palestinian people."<sup>51</sup> That is a low bar. A measure such as the U.S.-constructed floating pier to bring seaborne humanitarian aid into Gaza, for example, could be described as a "meaningful step on behalf of the Palestinian people," even though it has done nothing to slow the devastating Israeli offensive.

MBS, who can be assumed to care more about a security guarantee and other benefits he would get from the United States than about the welfare of Palestinians, probably would be comfortable with a mushy formulation about Israeli obligations. A summary of talks he had with Sullivan in May said that Saudi Arabia expected agreement on a

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<sup>49</sup> Megan K. Stack, "The View Within Israel Turns Bleak," *New York Times*, May 16, 2024, <https://www.nytimes.com/2024/05/16/opinion/israeli-palestine-psyche.html>.

<sup>50</sup> "Netanyahu Boasts of Thwarting the Establishment of a Palestinian State 'For Decades.'" *Times of Israel*, February 20, 2024, <https://www.timesofisrael.com/netanyahu-boasts-of-thwarting-the-establishment-of-a-palestinian-state-for-decades/>.

<sup>51</sup> Edward Wong and Vivian Nereim, "Israel Resists Grand Bargain as U.S. and Saudis Work on Security Pact," *New York Times*, May 17, 2024, <https://www.nytimes.com/2024/05/17/us/politics/israel-saudi-arabia-gaza.html>.

“credible pathway” toward a two-state solution, which is weaker than previous Saudi language on the subject.<sup>52</sup>

*Israel and especially Netanyahu have a record of saying enough to satisfy immediate U.S. or Western pressure to do something about the conflict with the Palestinians and then not following through.*

Israel and especially Netanyahu have a record of saying enough to satisfy immediate U.S. or Western pressure to do something about the conflict with the Palestinians and then not following through – as exemplified by Netanyahu, during his first tenure as prime minister, reneging on the 1998 Wye agreement that called for partial withdrawal of Israeli forces from the West Bank.<sup>53</sup> If a three-way deal among the United States, Saudi Arabia, and Israel materializes this year, subsequent events are likely to unfold similarly, and peace for Palestinians and Israelis will be at least as distant as ever.

## Conclusion

Whatever may be the domestic political objectives of reaching the kind of security agreement with Saudi Arabia that is being talked about, such a pact would offer little or no strategic benefit to the United States and instead would entail serious risks. Such a pact would be a net negative regarding nuclear nonproliferation and the Israeli-Palestinian situation, and a trap for pulling the United States into conflicts in which it does not have a stake.

An irony is that competition with China is cited as a rationale for extending the kind of commitment being discussed. Getting more deeply committed to one side or the other of Middle Eastern conflicts would impair the U.S. ability to compete with China and put

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<sup>52</sup> David Ignatius, “The U.S. Assembles the Pieces of a Possible Gaza War Endgame,” *Washington Post*, May 20, 2024, <https://www.washingtonpost.com/opinions/2024/05/20/gaza-war-endgame-us-saudi-arabia-hamas-israel-iran/>.

<sup>53</sup> “Wye Deal in the Spotlight,” BBC, July 31, 1999, [http://news.bbc.co.uk/2/hi/middle\\_east/405210.stm](http://news.bbc.co.uk/2/hi/middle_east/405210.stm).

off indefinitely any “pivot” to East Asian affairs. Competing more effectively with China would require emulating what China does in the Middle East: not dividing and militarizing the region but instead engaging with everyone and working to lower rather than to raise tensions and the risk of war.

Saudi Arabia is an important regional state with which the United States can and should engage extensively. But beneficial engagement does not require bestowing the kind of security and nuclear gifts currently being discussed. The United States should be prepared to negotiate with the Saudi regime on all issues of mutual interest, while remembering that Saudi and U.S. interest differ significantly on many of those issues, and that ultimately Saudi Arabia is more dependent on the United States than the U.S. is on Saudi Arabia.

As for issues involving Israel, if the administration really wanted to leverage Israel, the voluminous U.S. aid and diplomatic cover that the United States gives to Israel represent much larger and more direct sources of leverage than any indirect maneuver involving Saudi Arabia.

## About the Author

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