

THE SAUDI-UAE RIFT: A HIGH STAKES STRATEGIC RIVALRY?

Samuel Ramani

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Key Developments in the Saudi-UAE Rift

- December 2 - UAE-aligned Southern Transitional Council forces launch offensive against al-Mahra and Hadhramout
- December 9 - STC seizes de facto control over the six governorates of southern Yemen
- January 2 - Saudi Arabia backs a successful Yemeni government counter-offensive to dismantle the STC
- Narrative war escalates, Saudi Arabia makes strategic plays in Saudi Arabia and Sudan, bilateral diplomacy freezes
- February 28 - US-Israel War with Iran leads to temporary reconciliation

Questions to Consider on the Saudi-UAE Rift

This webinar will address three critical inter-related questions:

- 1) Was the Saudi Arabia-UAE “alliance” always more fragile than assumed?
- 2) What caused the dramatic escalation of Saudi-UAE tensions in December 2025?
- 3) Will the current spirit of Gulf solidarity outlast the Iran War?

The Fragile Saudi-UAE Alliance

- The Saudi-UAE alliance was often regarded as the cornerstone of the GCC or at times of crisis like the 2017 Qatar blockade for it, a viable replacement for it
- Saudi Arabia and the UAE were always much less aligned than they seemed:
 - 1) Disparate Views on the Regional System
 - 2) Conflicting Interests in Crisis Settings
 - 3) Societal Fissures
- Personal relationships and security threats often masked these fissures

Saudi Arabia and the UAE's Clashing Visions on the Regional System

- While Saudi Arabia and the UAE both greeted the 2011 Arab Spring with suspicion, these revolutions sowed the seeds for polarization
- The UAE became increasingly assertive as a regional power and aggressively promoted its anti-Islamist agenda
- While not outwardly revisionist, the UAE did not equate stability with the status quo
- Saudi Arabia linked stability to a strong state approach to regional geopolitics

Saudi Arabia and the UAE's Conflicting Geopolitical Interests

Saudi Arabia and the UAE have had long-standing frictions over key geopolitical issues:

- 1) Yemen- Unity vs. Secession plus the legacy of the post-2015 military intervention
- 2) Sudan- Burhan vs Hemedti intra-military turf war
- 3) Israel/Palestine- Merits of the Abraham Accords
- 4) Syria- Subtle but enduring disagreements from Assad-era to today
- 5) Somalia- Status of Somaliland and regional engagement

Societal Fissures between Saudi Arabia and the UAE

- There is a tendency in Western foreign policy circles to homogenize the GCC or ignore state-society relations as a prism of understanding regional developments
- This caused the latent frictions between Saudi and Emirati societies on key regional issues to be largely ignored
- An examination of state-society relations reveals a years or even decades-long buildup to the current tensions
- The escalation of the social media narrative war is now the latest manifestation of these trends

Drivers of the Saudi-UAE Escalation in December 2025

- Yemen and to a lesser extent Sudan were viewed as the core drivers
- These were triggers but do not tell the whole story, another factors:
 - 1) Saudi Arabia has aimed to reassert its hegemony over the GCC
 - 2) Intensification of Saudi Ambition in Africa
 - 3) Strengthening Israel-UAE cooperation, frictions between the UAE and Egypt, Stronger Saudi Arabia-Turkey relations

The Geo-Economic Drivers of Saudi-UAE Contestation

- In the near-term, OPEC+ has held, and oil has not featured prominently in the rivalry
- Critical Minerals have emerged as the ground zero in the Saudi-UAE rivalry as the rift is Africa focused
- Vision 2030's goals and sovereign fund rivalries also play into this
- Geo-economic power projection and strategic investments will be the primary means of contestation

Regional and Great Power Approaches to the Saudi-UAE Rivalry

- Saudi Arabia and the UAE have subtly tested the loyalty of fellow GCC countries and regional actors
- Most countries have maintained carefully calibrated balancing strategies or selective alignments (Oman on Yemen, Egypt on Sudan)
- Great powers have similarly chosen not to escalate or pick sides, even though Trump's handling of this crisis has been scrutinized

Iran War's Impact on the Saudi-UAE Rift

- The Iran War has led to a temporary de-escalation of caustic rhetoric and resumption of bilateral dialogue
- This spirit of cooperation is likely to continue as long as drones and missiles rain on the Gulf
- However, a long war scenario will temporarily rein in sovereign fund ambition and sharpen geo-economic contestation
- The Saudi-UAE rift has de-escalated temporarily but the core issues remain unresolved

Q&A

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