

The Emirati Moment The U.A.E.'s Strategic Cycle and the Iran War

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I. Introduction

The 2026 Iran war has forced a strategic reckoning on every state in the Persian Gulf, but none more acutely than the United Arab Emirates (U.A.E.). Over the past fifteen years, the U.A.E. pursued the most ambitious and most experimental foreign policy of any Gulf state, evolving from a commercially oriented federation of city-states into a regional power with an interventionist agenda, an ideological project, and a vision for regional order that culminated in the Abraham Accords in 2020.

That vision started encountering a series of shocks, starting with the Israel-Hamas war of 2021: American unreliability; Israeli political instability; increasing Iranian belligerence; and the return of hostile currents in Washington. In response, the U.A.E. retreated into a strategy of “omni-alignment,” which involved maintaining relationships with every major power while committing to none, hedging between Washington and Beijing as well as between Jerusalem and Tehran, and betting that the strategic environment would remain permissive enough to sustain this posture indefinitely. Iran’s massive retaliatory campaign against the U.A.E. during the last weeks, in which the Emirates absorbed more missile and drone fire than Israel itself, destroyed that bet.

The U.A.E. now faces a strategic environment in which every option carries significant costs, and the core assumption of its recent foreign policy—that a small, wealthy state can remain indispensable to all sides without choosing among them—has been empirically falsified. Understanding how Abu Dhabi arrived at this conundrum, and what it means for American policy, requires tracing the full arc of the U.A.E.’s post-Arab Spring strategic cycle and its current collapse.

II. Omni-Alignment: The Evolution of U.A.E.’s Post-Arab Spring Strategic Doctrines

Before 2011, the U.A.E. was not a regional power in any conventional sense. Its international profile rested almost entirely on Dubai’s experiment in post-oil commercial globalization as a logistics hub, a financial center, and a real estate spectacle. Abu Dhabi held the oil wealth and managed a cautious, low-profile foreign policy. The Arab Spring changed the strategic outlook of the U.A.E. fundamentally, giving it both the opportunity and the motivation to become a leading regional power.

The political model that emerged from the uprisings of a populist Islamism channeled through electoral legitimacy, above all the Muslim Brotherhood, posed an existential threat to the Gulf monarchies’ governing bargain. The Brotherhood’s success in Egypt, its surge in Tunisia and Libya, and its deep networks across the region confronted the U.A.E. with a challenge that was ideological before it was military: a competing vision of political order that could delegitimize the Gulf model from within the Arab world.

At the same time, the Arab Spring dramatically accelerated the already pre-existing Emirati threat perception of Iran. The U.A.E.'s fear of the Islamic Republic predated the Islamic Revolution itself due to Iran's 1971 seizure of Abu Musa and the Greater and Lesser Tunb islands, which the U.A.E. has never recognized, and which remain a live territorial dispute that successive Iranian governments have refused to negotiate.¹

The Islamic Republic's post-1979 threat compounded the territorial grievance with an ideological one, as Tehran positioned itself as the patron of Shia communities across the Gulf and cultivated proxy networks that gave it the capacity to threaten the Gulf states from multiple vectors simultaneously. But it was the Arab Spring that transformed Iran into an urgent and expanding threat. The collapse of state authority across the region opened vacuums that Tehran filled with remarkable speed and at minimal cost: in Syria, where Iranian intervention and Hezbollah's deployment preserved the Assad regime and converted the country into a forward operating base for Iranian power projection; in Yemen, where the Houthi seizure of Sanaa in 2014 gave Tehran a proxy force on the Arabian Peninsula itself,² capable of striking Gulf infrastructure with Iranian-supplied missiles; and in the broader destabilization of Egypt, where Hamas—an organization simultaneously embedded in the Brotherhood's institutional network and dependent on Iranian material support—played a role in the turbulence that accompanied the Brotherhood's rise and fall. The post-2011 Middle East, in short, did not merely present, concurrently, an Islamist and an Iranian challenge. The two were inseparable aspects of the Arab Spring: the disorder that political Islam's surge produced was precisely the medium through which Iranian influence advanced.

III. The Counterrevolutionary Response

The U.A.E.'s response was swift, interventionist, and broadly counterrevolutionary. Abu Dhabi became the most aggressive Gulf backer of Abdel Fattah el-Sisi's seizure of power in Egypt in 2013, invested heavily in anti-Brotherhood forces across North Africa and the Horn, and positioned itself as the anchor of an Arab "moderate axis" alongside Saudi Arabia, Bahrain, and Egypt, defined less by what it supported than by what it opposed: political Islam in all its institutional forms.³

During the high-interventionist phase, the U.A.E. treated the linkage between Iran and the Arab Spring Brotherhood threat as axiomatic. Abu Dhabi supported the Trump administration's maximum pressure campaign against Iran, endorsed the withdrawal from the Joint Comprehensive Plan of Action (JCPOA), and treated the containment of Iranian influence as a strategic priority fully integrated with the anti-Brotherhood vision. Iran and the Brotherhood were understood as two faces of the same problem—rival models of political Islam, one Shia and one Sunni, both hostile to the Gulf monarchical order, both capable of operating within and destabilizing Gulf states, and both requiring simultaneous suppression if the regional architecture Abu Dhabi envisioned was to be viable.

This period also produced the U.A.E.'s brief experiment with direct military power projection, the "Little Sparta" phase, as it was called by General James Mattis, in which Emirati special operations forces and air power deployed into Yemen, Libya, and the Horn of Africa, primarily focusing on suppressing Salafist-Jihadist groups.⁴ The Yemen intervention proved to be operationally competent, and Emirati forces outperformed their Saudi counterparts by most measures, but it ultimately taught Abu Dhabi that direct expeditionary force projection into ideologically saturated environments produces a quagmire without

political resolution. The U.A.E. withdrew from its most exposed positions in Yemen and shifted toward a model of intervention-by-proxy and logistical corridor control, maintaining regional influence while limiting the exposure of its small citizen population to sustained combat.

IV. The Abraham Accords

Two additional features of this period shaped what followed. First, the U.A.E. found itself persistently at odds with the Obama administration's foreign policy establishment, which was broadly sympathetic to political Islam's participation in governance and critical of the counterrevolutionary ethos Abu Dhabi had adopted. This planted an early seed of doubt about the reliability of the American strategic partnership as the political winds in Washington shifted. Second, the U.A.E.'s anti-Brotherhood, anti-Iran posture converged naturally with Israeli strategic priorities, producing an intelligence and operational alignment that preceded the diplomatic one by years. By the late 2010s, the U.A.E. and Israel shared threat perceptions, coordinated on regional security, and viewed each other as allies in a Middle East they both wanted to stabilize against Islamist disruption and Iranian expansion.

The Abraham Accords formalized this convergence and represented the peak of Emirati strategic ambition. The U.A.E. was not merely normalizing relations with Israel; it was betting on a full reorganization of the regional order under American leadership. This new Emirati integrative logic sought to lock Islamists out of formal power structures, leverage Israeli military and intelligence capability as a force multiplier against Iran and terrorism, and convert the Emirati economic model of diversification, technological modernization, social liberalization, and global hub status into political capital and an exportable template for the region. The resonance of this vision was visible in Saudi Arabia, where Crown Prince Mohammed bin Salman's own transformation program appeared to follow the Emirati template. The Abraham Accords were, in this sense, the leading edge of an arc of broader realignment that was expected to eventually include Riyadh.

Additionally, the Abraham Accords framework was also an attempt to solve a problem the U.A.E. had already identified: that American commitment to the Gulf could no longer be taken on faith. The convergence with Israel was itself partly a response to the Obama-era demonstration of American unreliability. Abu Dhabi was not assuming American commitment but trying to reconstruct it on new terms, binding Washington to the U.A.E. through the institutional weight of a regional architecture that included Israel and that would make American disengagement costly and unpopular in Washington.

V. Unraveling and Pivot

This framework, therefore, rested not on the expectation that the United States would remain reliable by default, but on the more sophisticated wager that the new architecture could make it reliable by design. The U.A.E. was also gambling that the regional environment would remain conducive enough for the project to consolidate before it was tested. Rapid and cumulative shocks, however, undid those expectations.

In 2021, Israel's Operation Guardian of the Walls against Iranian-supported Hamas demonstrated that the Israeli-Palestinian fault line remained explosive, regardless of the Accords' promise of a new regional logic, and that Iran retained significant influence over when and how it erupted. The following year, Houthi strikes on Abu Dhabi,⁵ and the muted American response, delivered a direct demonstration that the new architecture had not yet generated the deterrent effect it was supposed to provide. The inclusion of extremist parties in Israel's governing coalition and the ensuing wave of domestic protests and international outrage made public Emirati association with Jerusalem politically costly in ways Abu Dhabi had not anticipated. And the Biden administration's return of Obama-era officials hostile to the Gulf's post-Arab Spring posture, coupled with the decision to withhold the F-35 jets the U.A.E. had been promised as part of the Accords,⁶ confirmed that the institutional architecture had not, in fact, locked in American commitment—that Washington could renege on the bargain even after it had been formalized. Each shock individually was manageable. Their accumulation destroyed the premise that the new framework could consolidate faster than the threats arrayed against it.

The U.A.E.'s response was not drift but a coherent strategic adjustment: omni-alignment. Abu Dhabi maintained the Abraham Accords and the intelligence and technology dividends they produced. But the U.A.E. tried to balance its relationships with Israel and the United States with an outreach to Tehran and more cooperation with Beijing.

On Iran, Abu Dhabi decided to decouple Iran from the threats of Sunni Islamism and pursue accommodation with Tehran even as it continued to oppose the Brotherhood. It thus opened a diplomatic channel to Tehran, a gentleman's agreement designed to prevent the U.A.E. from being targeted in any future Iranian confrontation. This represented a fundamental departure from the hawkish posture of the previous decade. It was, in effect, a bet that Iran could be bought off through diplomatic deference and economic engagement. The U.A.E. also significantly deepened the economic relationship with China as insurance against American unreliability, including granting the Chinese a secret military base near Abu Dhabi, whose construction was stopped after American intervention.⁷ It also retreated from "Little Sparta" ambitions and limited interventionism to cases directly tied to Emirati logistical and economic corridor interests in the Horn of Africa. The operating logic was classic small-state hedging in a multipolar environment: position Abu Dhabi as an indispensable node in every major power's network without becoming captive to any single one. This strategy was rational, coherent, and, for roughly four years, it worked. Its foundational assumption, that the strategic environment would remain permissive enough to sustain multi-directional hedging without forcing a binary choice, held until Operation Epic Fury.

VI. The Collapse

During Operation Epic Fury, Tehran made it abundantly clear that it was aiming to destroy the U.A.E.'s omni-alignment strategy. In the opening days of the operation, Iran's retaliatory campaign distributed fire across the entire Gulf, but the U.A.E. absorbed a disproportionate share. By the war's sixth week, Iran had launched over 400 ballistic missiles, more than 2,000 drones, and 19 cruise missiles at Emirati targets alone—more than it fired at Israel.⁸ The targeting pattern was not random. Iranian strikes hit Dubai International Airport, the Jebel Ali port complex, Abu Dhabi National Oil Company (ADNOC), energy infrastructure, Amazon Web Services data centers, and the dense commercial fabric of Dubai and Abu Dhabi that constitutes the U.A.E.'s center of gravity. Iran was not attempting to destroy the U.A.E.'s military. It was attempting to destroy the Emirates' economic model—serving as a logistics hub, commercial node, financial center, etc.—that is the foundation of its power and the basis of its claim to regional indispensability.

Tehran's punitive message is that there is no neutral position. Tehran was punishing the U.A.E. specifically for the hedging strategy, for normalizing with Israel while signaling restraint, and for attempting to be indispensable to all sides without bearing the costs of commitment to any. The gentlemen's agreement with Tehran, the channel that was supposed to prevent exactly this scenario, proved worthless the moment it was tested. Iran treated the U.A.E. not as a neutral party to be spared but as a co-belligerent to be made to pay.

Each pillar of the omni-alignment strategy was invalidated in sequence. The Iran channel did not prevent the U.A.E. from being targeted but may have encouraged Iranian escalation by signaling that Abu Dhabi lacked the resolve to respond. The China relationship, the supposed insurance policy against American unreliability, produced no security dividend whatsoever; Beijing called for restraint, urged dialogue, and did nothing. The Abraham Accords relationship delivered operational value through Israeli intelligence sharing and potential missile defense coordination, but did not, by itself, deter Iranian fire. And American protection did not extend to the civilian economy, which is the U.A.E.'s actual center of gravity. The U.A.E.'s air defenses performed superbly against ballistic missiles, but Iranian drones proved far harder to intercept, and the sheer volume meant that even a low leakage rate produced serious damage to infrastructure.

The shock of Iranian fire was compounded by a second, less anticipated blow: the regional Arab response. The U.A.E. spent the post-Arab Spring decade building what it understood as an Arab moderate axis, with Egypt as the cornerstone. The Sisi relationship was arguably the U.A.E.'s most expensive regional investment: billions in direct financial support, political cover, and diplomatic coordination. Then, as the war broke out, Egypt positioned itself as a mediator rather than an ally under attack, calling for de-escalation alongside Pakistan and Turkey rather than rallying to the Gulf's defense.⁹ Across the broader Arab world, in public discourse, on social media, and from established statesmen, the Emirati experience elicited reactions ranging from indifference to barely concealed satisfaction¹⁰ at the humbling of a wealthy Gulf state perceived as having overreached through its alignment with Washington and Jerusalem. The Arab League produced no meaningful collective response. The U.A.E. discovered that economic generosity had purchased neither strategic solidarity nor loyalty, and that its regional position was far more isolated than its commercial centrality had led it to believe.¹¹ This compounded the strategic lesson of the Iranian strikes themselves: not only had great power hedging failed, but even the Arab strategic partnership the U.A.E. had invested in for over a decade proved hollow when tested.

The Emirati response to the war traced an interesting arc. In the war's opening days, the U.A.E. emphasized restraint, insisting that this was not its conflict and urging de-escalation. The instinct was to preserve distance from the U.S.-Israeli operation and limit Iranian retaliation. Within days, as Iranian strikes continued and escalated regardless, this position became untenable. The U.A.E. closed its embassy in Tehran and recalled its ambassador from Iran.¹² The pivot accelerated. The Gulf Cooperation Council issued a joint condemnation of Iranian strikes. The U.A.E. reclassified Iranian attacks as "terrorist attacks."¹³ The Emirati Ambassador to the United States, Yousef al-Otaiba, signaled Emirati openness to joining military operations against Tehran, particularly to end Iran's stranglehold on the Strait of Hormuz. Presidential advisor Anwar Gargash declared that the U.A.E. "triumphed in a war we sincerely sought to avoid" and that Abu Dhabi would now move to "shape the future" with "greater leverage"¹⁴—language that concedes the hedging era is over while reaching for a posture that has not yet been defined. The U.A.E. went from urging restraint to endorsing decisive action against Iran in a matter of weeks. That velocity of reversal is itself the measure of the old strategy's collapse. This is the end of a strategic era.

VII. The Conundrum

The war has left the U.A.E. in a strategic position without precedent in its modern history. Every framework Abu Dhabi has employed since 2011 has been tested to destruction, and no successor framework has emerged. What has emerged instead is a set of constraints that define the conundrum.

A recent statement by Anwar Gargash, close advisor to Sheikh Mohamed bin Zayed, clearly captured the new situation: the U.A.E. would “carefully analyze our regional and international relations and determine who can be relied upon.”¹⁵ The formulation is as notable for what it concedes as for what it promises. To announce a reassessment of all relationships is to acknowledge that the prior assessment, the one that produced the hedging strategy, was wrong or, at best, no longer tenable. And the scope of the reassessment extends beyond the obvious failure of the Iran channel. The war exposed the thinness of the intra-Arab solidarity that the U.A.E. had spent a decade cultivating. The U.A.E. discovered that it had purchased economic dependence but not strategic loyalty, a distinction that matters enormously when missiles are falling on your airports. Gargash’s call to “determine who can be relied upon” is directed as much at Cairo and the Arab League as it is at Tehran and Beijing.

The possibilities, however, are limited. The U.A.E. cannot project offensive military power sufficient to independently deter Iran. Its citizen population of roughly one million permanently limits the generation of conventional forces. The “Little Sparta” experiment demonstrated that Emirati special operations forces and air power can perform at a high level in coalition contexts, but it also demonstrated the limits of expeditionary operations for a demographic microstate. Investment in drone warfare and artificial intelligence-enabled autonomous systems, a path the U.A.E. is well-positioned to pursue given its capital reserves and tech-sector infrastructure, could raise the cost of attacking the Emirates and contribute meaningfully to coalition operations. But such capabilities require intelligence architecture, basing, and logistics that the U.A.E. cannot currently sustain independently. They function as a complement to alliance integration, not a substitute for it. The weapons systems that proved decisive against Iran in this war remain exclusively in American and Israeli hands.

Nor can the U.A.E. rebuild the Iran hedge. Tehran has demonstrated both the willingness and the capacity to punish omni-alignment, and the targeting pattern of the war ensures that the cost of any future Iranian retaliation would fall precisely on the economic assets the U.A.E. can least afford to lose. Gargash himself drew the conclusion: “With this regime, there is no trust.”¹⁶ The China option, meanwhile, has been empirically tested and found empty. Beijing’s response to the war consisted of calls for restraint and behind-the-scenes involvement in ceasefire mediation, which is useful diplomatically but irrelevant militarily. No Chinese security guarantee is on offer and pursuing one would jeopardize the American relationship at precisely the moment the U.A.E. has declared its intention to “double down” on Washington.

What remains is the U.S.-Israel axis, but on terms fundamentally different from those of the Abraham Accords era. The U.A.E. is no longer approaching this relationship as the architect of a regional vision, confident in its leverage and able to set conditions. It is approaching it as a state that has absorbed a major attack, discovered the limits of self-reliance and hedging alike, and concluded that formalized security commitment from a great power is not a matter of strategic preference but of national survival. Gargash’s statement that Iran’s aggression “will solidify the American role in the Gulf” and that Israeli influence in the region would grow as a consequence was an acknowledgment of a *fait accompli* produced by Iranian fire.

VIII. Implications for U.S. Policy

The U.A.E.'s strategic reckoning presents Washington with a narrow but significant window. For the first time since the Abraham Accords, the Emiratis are not hedging, not balancing between Washington and Beijing, and not maintaining a back channel to Tehran as insurance against American unreliability. They are actively seeking deeper commitment to the United States, not out of regional vision, as in 2020, but out of a hard-won recognition that no alternative security framework proved viable under fire. This is a qualitatively different basis for partnership, and it will not last indefinitely.

However, while the specific instruments of the previous phase of omni-alignment have been discredited, the incentives that produced the hedging strategy in the first place have not disappeared. The U.A.E. remains a small, wealthy, militarily dependent state in an increasingly dangerous region, and the instinct to diversify its dependencies rather than concentrate them on a single patron is a permanent feature of the country's strategic condition. As the immediate shock recedes, the temptation to rebuild relationships with Beijing on commercial terms that gradually acquire strategic implications, or to seek new forms of diplomatic insurance with regional powers, may reassert itself.

The speed with which this dynamic reasserts itself is already visible. Within weeks of declaring its intention to “double down” on Washington, the U.A.E. dispatched Crown Prince Khaled bin Mohamed to Beijing for a three-day visit that included a meeting with Xi Jinping and a high-level delegation of ministers, energy executives, and investment officials consolidating the economic relationship between both countries.¹⁷ Simultaneously, the U.A.E.'s central bank governor raised the prospect of a dollar swap line with the U.S. Treasury, coupling the request with a warning that, absent American financial support, the Emirates might be compelled to denominate oil transactions in Chinese yuan, a formulation that is less a plea for assistance than an exercise of leverage.¹⁸

If the United States does not formalize its commitment while the current clarity still holds, it will find that the Emirates have improvised a new version of their hedging strategy adapted to post-war conditions — one potentially more opaque, more difficult to reverse, and less amenable to the kind of institutional integration that a mutual defense framework would provide.

The best instrument for the United States to undermine the hedging incentives for the U.A.E. is likely a mutual defense treaty, either bilateral or, more preferably, embedded within a broader regional security architecture that includes Israel and, eventually, Saudi Arabia. The U.A.E.'s experience in this war is the strongest empirical case for such formalization. A country operating under informal security understandings absorbed thousands of missiles and drones aimed at its civilian economy while its ostensible partners issued statements. A country with treaty-bound protections, integrated missile defense, shared early warning, and defined mutual obligations would have been in a fundamentally different position because the deterrent calculus in Tehran would have been different before they were, and the collective response architecture would have been in place when they arrived.

Formalization carries obligations on both sides. The U.A.E. would need to accept constraints on the omni-alignment flexibility it valued: limits on military and intelligence cooperation with China, clearer basing commitments, alignment on technology transfer protocols, and an end to the diplomatic ambiguity toward Iran that characterized the 2021–2025 period. These are real sovereignty costs, and previous Emirati strategic thinking would have resisted them. The war has altered the calculus. Gargash's public statements constitute a signal that Abu Dhabi understands what formalization requires and is preparing its political ground. Washington should take that signal seriously and move before the window narrows.

The United States, for its part, must recognize what the U.A.E. brings to a formalized alliance beyond basing rights. The Emirati economic model is a strategic asset that amplifies American power in the region in ways that purely military partnerships do not. Defending that asset is not a concession to a client state; it is an investment in the architecture of regional order that Washington will need long after the current war ends. The alternative of allowing the U.A.E. to drift back toward a new form of hedging would significantly undermine the future of U.S. interests in the Gulf.

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