

## Saudi Arabia's Challenge to the Abraham Accords

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Before October 7, 2023, Saudi Crown Prince Mohammed bin Salman (MbS) was actively negotiating normalization with Israel. The deal architecture with Washington—a bilateral defense pact, a civilian nuclear program, and formal recognition of Israel—was coming together, and MbS had signaled privately that he viewed normalization as strategically worthwhile regardless of the Palestinian cause. [He told](#) Secretary of State Antony Blinken in January 2024 that he did not care personally about the Palestinian issue, but that his people did, and that he needed any agreement to be “meaningful” enough to manage domestic opinion. The assumption in Washington and Jerusalem was that Saudi accession to the Abraham Accords remained a matter of timing and terms. That assumption has been significantly undermined by regional developments since then. Over the course of the years since the Hamas October 7 attacks, which actively sought to derail normalization, Saudi Arabia has arrived at a strategic assessment of the regional order that treats both Iran and Israel as equally revisionist actors whose conflict dynamics destabilize the Gulf at the expense of states that sought no part in their conflict. That assessment now dominates Saudi policy, and the [Islamabad Memorandum of Understanding](#) (MOU) signed on June 17 between the United States and Iran has given it the force of demonstrated fact.

This Saudi assessment of Israel and Iran as equally destabilizing forces is politically powerful, but it rests on a false equivalence. Iran is revisionist in its regional purpose: it seeks to reorder the Arab world through proxies, missiles, nuclear threat, and coercive control of maritime chokepoints. Israel, after October 7, became revisionist in its operational method: it no longer accepts prior constraints on the use of force against threats it judges existential. The Saudi strategy rests on collapsing these into a single category.

### Israeli Forward Defense After October 7

October 7 destroyed the foundational assumption on which Israeli security doctrine had rested for decades. The breach of the Gaza border and the massacre of approximately 1,200 civilians and soldiers by a sub-state militia that Israel’s intelligence had judged to be deterred demonstrated that deterrence—understood as the demonstrated capacity and perceived willingness to impose devastating costs on any attacker—could fail. The Israeli security establishment drew from this failure a doctrinal conclusion with far-reaching regional consequences: that threats facing Israel could no longer be managed through periodic demonstrations of force held in reserve, and that reactive containment had to give way to forward defense, meaning the active and preemptive elimination of threats, defined as capabilities and not merely

intent, wherever they were located, were on a timeline dictated by operational necessity rather than diplomatic constraint.

Over the eighteen months that followed, Israel conducted a sustained ground and air campaign in Gaza aimed at the permanent dismantlement of Hamas's governing and military capacity, launched an escalating war against Hezbollah in Lebanon that eliminated much of the organization's senior leadership, [struck Iranian](#) military assets in Syria and Houthi infrastructure in Yemen, carried out an [airstrike in Doha](#), Qatar, targeting a Hamas delegation on the sovereign territory of a state hosting an American airbase, and in February 2026, joined the United States in direct strikes against Iran itself. Each of these operations addressed, from Jerusalem's perspective, a specific and identifiable threat to Israeli security. The targets, from Jerusalem's perspective, belonged to one integrated Iranian and Islamist threat network. Yet, the cumulative image portrayed from other capitals in the region was that of a state conducting military operations across six sovereign countries in rapid succession, retaining territorial positions in Gaza, Lebanon, and Syria as it did so, operating with evident disregard for sovereign boundaries or for the diplomatic and security calculations of the states on whose territory or in whose neighborhood the strikes landed.

## The Saudi Trajectory

The Saudi response evolved in direct tandem with the progress of Israeli operations. The war in Gaza initially suspended normalization talks, but Saudi officials [insisted](#) the process had been postponed rather than abandoned and would resume once the fighting ended. As the Gaza campaign lengthened and its costs mounted, however, the Saudi position began to harden in ways that tracked the intensification of Israeli action. By May 2024, the Saudi Foreign Ministry was describing the war as [genocide](#). By September 2024, MbS had told the Shura Council that the Kingdom [would not establish](#) diplomatic relations with Israel without the prior establishment of an independent Palestinian state with East Jerusalem as its capital, converting what had been a flexible and negotiable parameter into an immovable demand attached to an outcome that the Israeli Knesset had voted to foreclose.

As Israeli operations expanded beyond Gaza into Lebanon, Syria, and Yemen over the course of 2025, the Saudi position shifted from reluctant postponement of normalization to active opposition to the entire strategic framework that normalization represented, including leading an "[anti-Abraham Accords](#)" bloc. By summer 2025, Saudi [state media](#)—which operates under government direction—had reoriented entirely, framing normalization as a strategic liability that would expose the Kingdom to the consequences of Israeli military's behavior without giving Riyadh any influence over it. The Israeli strike on the Hamas delegation in Doha in September 2025—conducted on the sovereign territory of a Gulf state hosting the forward headquarters of U.S. Central Command—triggered a qualitative break in this trajectory. Washington had neither prevented the operation nor imposed meaningful consequences afterward. Within eight days, Saudi Arabia [signed the Strategic Mutual](#) Defense Agreement with nuclear-armed Pakistan—the first mutual defense treaty between an Arab Gulf state and a nuclear power—whose senior Saudi official described it as "a comprehensive [defensive agreement](#) that encompasses all military means" when asked whether it included Pakistan's nuclear arsenal. The causal logic was that if Israel could strike targets

on the sovereign territory of an American treaty partner without meaningful American objection, then no Gulf state's security could depend on the American framework alone, and the Israeli alignment that the Abraham Accords offered was as likely to attract threats as to deter them.

By autumn 2025, Saudi hostility had broadened beyond Israel itself to target the Abraham Accords and the UAE as its principal Arab beneficiary. Saudi state-affiliated writers branded Abu Dhabi as an "[Israeli Trojan horse](#)," "an Israeli project wearing an Arab cloak," and a betrayal of God, His Messenger, and the nation in a campaign aimed at the strategic model the Accords embodied: the proposition that Gulf security could be enhanced by aligning with Israeli military capability within the American-led regional architecture. Israeli military activism had [reinforced](#) in Riyadh the perception of Israel as a revisionist and destabilizing power whose expanding operations generated the very regional instability that the Accords were supposed to prevent. Paired with a longstanding and unchanged assessment of Iran as a persistent threat to Gulf sovereignty, this produced the dual-revisionist framework that now governs Saudi strategic thinking: that the Iran-Israel conflict is itself the principal source of Gulf insecurity, that neither party can be relied upon to exercise restraint, and that any framework locking the Gulf into one side of the contest exposes it to the other side's retaliation without providing a reliable defense against either.

What made the Saudi position consequential rather than merely rhetorical was that Riyadh accompanied its rejection of the Accords model with its vision of an alternative regional architecture. The Pakistan defense pact supplied the foundation, establishing a bilateral security guarantee whose deterrent capacity did not depend on Washington or Jerusalem. It was followed in December 2025 by defense, transportation, and investment [agreements with Qatar](#), a rapprochement that reversed the logic of the 2017 blockade and repositioned Doha as a partner in a sovereignty-centered Gulf order rather than a target of Saudi-Emirati coercion. In the same month, Saudi Arabia [bombed](#) a UAE-linked weapons shipment in the Yemeni port of al-Mukalla, marking the militarization of the Saudi-UAE split and showing that Riyadh no longer treated Abu Dhabi as a partner operating within the same strategic camp. In February 2026, Turkish President Recep Tayyip Erdogan [visited Riyadh](#) and signed defense cooperation agreements, including advanced negotiations on Saudi participation in the co-production of Turkey's KAAAN fifth-generation fighter. And on March 19, 2026—weeks into the war—Prince Faisal bin Farhan [convened](#) the first meeting of the R-4 quartet in Riyadh, bringing together the foreign ministers of Saudi Arabia, Pakistan, Turkey, and Egypt. The quartet [held three](#) ministerial meetings in 31 days, a shift from reactive coordination to institutionalized consultation. Together, the R-4 states command the Bosphorus and Suez outright and hold flanking positions on Hormuz and the Arabian Sea approaches to it—the [maritime](#) geography through which Gulf energy must move. What Saudi Arabia had assembled by the war's opening weeks was the outline of an alternative security framework premised on sovereignty, non-alignment, and equidistance from both revisionist poles, with Saudi Arabia as its convener.

The competition between the Saudi model and the Accord model was already evident within the Gulf before the war began. In early February 2026, Israeli strategists were assessing that [Saudi-UAE relations](#) had shifted from close partnership to open competition over regional leadership and strategic vision, with the divergence extending across Yemen, Sudan, the Horn of Africa, and the fundamental question of whether the Gulf's security orientation should run through the American-Israeli axis or through an autonomous Saudi-led architecture. Analysts [observed](#) that Riyadh, Doha, and Muscat were converging on core

regional principles—sovereignty, centralized states, and resistance to non-state actor empowerment—while the UAE was increasingly regarded as “the odd one out” and whose Israeli alignment was viewed across the rest of the Gulf Cooperation Council (GCC) as a strategic liability. The [rivalry was](#), by early 2026, a central feature of the Gulf’s geopolitical landscape rather than a passing diplomatic rift. The war with Iran subjected both models to an extreme and simultaneous stress test.

## The Two Models Under Fire

The UAE and Bahrain, the two Abraham Accords signatories in the Gulf, took the heaviest Iranian fire. The UAE alone [absorbed](#) more than half of all Iranian projectiles targeting GCC states, engaging 537 ballistic missiles, over 2,200 drones, and 26 cruise missiles in the weeks following the February 28 strikes. Bahrain experienced [debris impacts](#) on residential buildings, hotels, and areas near its international airport. Iran justified its target selection by [accusing GCC](#) states of facilitating the American operation, and the correlation between a state’s visible association with Israel and the volume of fire it received was difficult for any regional observer to ignore. Saudi Arabia was struck as well—Iranian missiles set the Ras Tanura petroleum complex ablaze, and its cities came under unprecedented missile alerts—yet its position at the war’s end differed from that of the Accords states in ways its own conduct had engineered. Some GCC officials [suspected](#) that the United States had prioritized the defense of Israel over the Gulf during the war’s opening phase, a perception that, whether or not it was accurate, further eroded confidence in the security guarantee that the Accords framework was supposed to deliver.

The record of Saudi conduct, reconstructed in [Wall Street Journal reporting](#), undercuts the language of equidistance. Riyadh lobbied Washington for weeks against the war, warning that any attempt to topple the regime would close Hormuz and damage the American economy and publicly ruled out the use of its bases and airspace. Once the strikes began it granted both and eventually flew its own unacknowledged sorties against Iranian drone and missile sites. The strike on Ras Tanura and Houthi threats to the Red Sea routes carrying most Saudi crude reversed the calculus: MbS pressed Washington to restrain Emirati strikes, to lift the naval blockade of Iranian ports, and to reconsider Project Freedom, the escort operation launched in early May to reopen the strait. When President Donald Trump proceeded, Saudi Arabia withdrew basing and airspace access and aborted the operation within hours of its launch; the White House threatened to drop the Kingdom from the priority list for interceptor deliveries, and Riyadh restored access. The understanding Riyadh reached with Tehran through Pakistani coordination then [removed most Saudi infrastructure](#) from the Iranian target list, and the exemption held through the war’s end. The UAE drew the opposite conclusion from the same pressures, withdrawing from the Organization of the Petroleum Exporting Countries (OPEC) in April and pledging to deepen its security ties with Washington and Jerusalem. What Saudi diplomacy marketed afterward as benign non-alignment was hedging under fire, disciplined by Iranian missiles on one side and American interceptor leverage on the other—and it delivered, allowing Riyadh to shape the war’s diplomatic conclusion through Pakistan and the R-4 while the Accords states absorbed the punishment their alignment attracted.

## The Islamabad MOU

The war's resolution, however, did more to vindicate the Saudi assessment than its opening phase. Israeli forward defense achieved significant operational results: Hezbollah's senior leadership was eliminated, Hamas's military capacity was severely degraded, and Iranian nuclear and missile infrastructure sustained direct strikes. Yet the scale of the regional crisis that these operations generated—the closure of Hormuz, the spike in global oil prices, the disruption of Gulf economies, the acceleration of inflation in American consumer markets—created pressure on the U.S. administration that ultimately exceeded its tolerance for continued hostilities. President Trump [acknowledged](#) at a press conference that he signed the MOU because he “didn't want to see an economic catastrophe,” a statement that Gulf capitals received as confirmation of what they had feared throughout the war: that there was a ceiling on what the United States was willing to bear on behalf of the regional campaign, and that when that ceiling was reached, Washington would seek terms with Tehran regardless of what the military situation on the ground permitted. Iran, which had absorbed enormous punishment, exploited this dynamic by weaponizing the economic consequences of the war against the American domestic calculus, converting military endurance into a form of diplomatic leverage that no amount of tactical success on the Israeli or American side could overcome.

The Lebanon clause of the MOU crystallized the result. Israel's forward defense doctrine demanded continued operational freedom in Lebanon to complete the degradation of Hezbollah. Iran insisted that Lebanon be included in the ceasefire, Washington accepted, and the MOU now [promises](#) the “immediate and permanent termination of military operations on all fronts, including in Lebanon.” Iran achieved through diplomacy what its military forces could not accomplish on the battlefield: a political shield for its most important surviving proxy, secured by an American signature rather than by Iranian arms. The shield is already doubling as a trigger. Israel [has rejected the clause](#) and continued operations in Lebanon; Iran has invoked those operations to justify renewed pressure on the strait, claiming to have re-closed it within 72 hours of the signing, and transit volumes [collapsed again](#) as vessels crossed dark. Every Israeli strike against Hezbollah now hands Tehran a license for economic coercion and drives the American commitment like a wedge between Washington and Jerusalem. Israeli forward defense, in the final analysis, ran into the limits of the patron's political endurance before it reached those of the adversary's military strength.

From Riyadh's vantage, not just the Lebanon clause, but most of the MOU reinforces the dual-revisionist assessment. The sanctions architecture [constructed](#) over four decades is slated for comprehensive dissolution. A \$300 billion reconstruction fund is [pledged](#) for the state that struck the Gulf, financed with “[regional partners](#)” whom Trump expects to include the very neighbors that Iran attacked. Israel was [excluded](#) from the negotiations entirely and uninformed of the agreement's contents. The Gulf states that aligned with the American-Israeli axis absorbed the worst of the war and are now being asked to finance the rehabilitation of the adversary that attacked them, while the state that built the alternative framework—Saudi Arabia—emerged with its diplomatic position intact, its institutional architecture operational, and its claim to regional leadership strengthened by the failures of the model it had warned against.

The R-4 quartet met for its [fourth session](#) in Cairo on June 21, four days after the MOU was signed, and issued a joint statement insisting that follow-on negotiations must account for “the security concerns of

regional states, particularly the stability and security of the Gulf Arab countries and the Levant.” The quartet is positioning itself as the framework through which Gulf security concerns will be articulated during the sixty-day negotiating period—not the GCC, not the Abraham Accords partners, and not a bilateral Saudi-American channel. Beyond the quartet, Riyadh is preparing to host the [GCC states and Iran](#) for talks on a regional non-aggression pact, maritime security, and confidence-building measures modeled on the 1975 Helsinki Accords, with standing ministerial and leaders' meetings as the objective. The R-4 alternative architecture now extends to incorporating Iran as a member of the order it was built to manage.

## The False Equivalence

The dual-revisionist assessment, however, requires careful scrutiny because its function in Saudi policy exceeds what its analytical content warrants. Riyadh is fully aware that Iran threatens Gulf security independently of Israel.

The framework's treatment of Iran and Israel as equivalent sources of instability is a strategic calculation before it is a threat assessment: the equivalence serves Riyadh's interests across several domains at once. Domestically, it aligns the Crown Prince with a public whose rejection of normalization surged after October 7, closing a gap between elite pragmatism and popular sentiment that had been widening since the Gaza war. Vis-à-vis Washington, it eliminates normalization as a deliverable the United States can extract in exchange for the defense pact, arms sales, and civilian nuclear program that Saudi Arabia wants on its own terms. The calculation is that Washington's new habit of bilateral transnationalism has demonstrated that Saudi Arabia could obtain what it needs from the United States directly without normalization and only at the cost of large Saudi sovereign wealth investment in United States.

Vis-à-vis Tehran, it reframes Saudi accommodation with Iran—the 2023 Beijing-brokered rapprochement, the wartime mediation through Pakistan, Prince Faisal's careful language about “rebuilding trust”—as prudent statecraft rather than capitulation. And within the Gulf itself, it delegitimizes the Emirati model by casting alignment with Israel as the source of the very insecurity it was supposed to prevent. Most fundamentally, it is a bid for regional leadership through the claim of benign non-alignment—a claim whose credibility among Gulf states the war has dramatically strengthened, regardless of whether its premises are fully honest.

The framework's central premise—that Iran and Israel pose equivalent threats to regional stability—does not survive contact with the record. The equivalence requires treating Israeli military operations conducted in response to October 7 as comparable in kind to Iranian behavior that predates October 7 by decades, and that would persist regardless of what Israel does or does not do.

The 2019 strikes on Aramco facilities involved no Israeli dimension. The Houthis targeted Saudi Arabia for years before the Abraham Accords existed. Iran struck Saudi cities and energy infrastructure while the Kingdom was publicly disclaiming the campaign and privately granting it bases, airspace, and strike sorties, and the fire abated only once Riyadh had purchased exemption through the Pakistani channel; the American military presence on Saudi territory would have made the Kingdom a target under any diplomatic

posture toward Jerusalem. Iran’s proxy networks in Iraq, Lebanon, Yemen, and Syria owe nothing to Israeli forward defense. They are instruments of revolutionary power projection whose purpose is the extension of Iranian influence across the Arab world at the expense of the sovereign governments that Saudi Arabia claims to protect. Iran’s pursuit of nuclear weapons capability, in defiance of its commitments under the Non-Proliferation Treaty, is a decades-long strategic program, indifferent to Israeli operations in Gaza or Lebanon, whose success would permanently alter the balance of power in the Gulf in ways that no framework of non-alignment or equidistance could manage. And Iran’s closure of the Strait of Hormuz during the war, followed by the establishment of the [Persian Gulf Strait Authority](#) (PGSA) as a permanent assertion of Iranian sovereignty over the world’s most critical energy chokepoint—an entity the U.S. Treasury sanctioned in May for extorting commercial shipping, and which [published permit, routing, and insurance requirements](#) for the strait within 48 hours of the MOU’s signing—targeted the economic foundations of the Gulf states themselves—the same states whose security the Saudi model promises to guarantee.

A regional architecture that absorbs these realities into a framework of equivalence with Israeli counterterrorism operations does not produce the balance that Riyadh advertises. It erodes the political basis for countering Iranian coercion by dissolving the distinction between a revolutionary regime’s instruments of regional domination and a U.S.-aligned state’s military campaign against real Iranian and Islamist threats, however disruptive that campaign has become for the surrounding region.

The new Saudi model’s deterrent claims also failed their one wartime test: when Washington threatened to withhold interceptor deliveries over the Project Freedom basing denial, Riyadh reversed course within days because the Pakistani guarantee substitutes for nothing at the point where Iranian missile capability actually bites. It is difficult to believe that Saudi equidistance and a non-aggression pact with Iran would be any more effective. It would depend on nothing but hope in Iranian self-restraint purchased through continuing accommodation. It also leaves Iran with its proxies and in control of Hormuz, and a Helsinki-style codification would freeze the regional status quo at the moment of maximum Iranian advantage.

## Reversing the Trajectory

The growing dominance of the Saudi model in Gulf strategic thinking is a product of American policy failure, and it must be understood as such if it is to be reversed. The MOU’s comprehensive concessions created the conditions for the Saudi alternative to become credible by demonstrating that Washington would accommodate Tehran when the costs of confrontation exceeded domestic tolerance. The sidelining of Israel, the inadequate protection of Gulf partners during the war, and the coercion required to keep Saudi bases open each reinforced the Saudi narrative that the American-Israeli framework generates instability rather than containing it. The framework’s trajectory is clear in who now advocates it: within three weeks of the MOU, Quincy Institute Executive Vice President Trita Parsi—for two decades Washington’s most effective proponent of accommodation with Tehran—[published](#) the case for the Riyadh-hosted architecture in *Foreign Policy*, welcoming it as the mechanism that “will eliminate the key motivation for keeping U.S. troops in the Middle East” and warning only that Iran’s de-containment should not be paired

too visibly with Israel’s re-containment into what he himself called an “anti-Abraham Accords.” A symmetry framework endorsed by one of the two parties it purports to balance has ceased to be symmetrical.

Accepting the Saudi framework as the permanent architecture of the Gulf would normalize the revolutionary adversary’s behavior at the expense of the democratic ally’s security—and, ultimately, at the expense of the Gulf states themselves. The answer is to reverse the policy errors that gave the Saudi model its evidentiary force:

- to preserve the non-nuclear sanctions categories that distinguish between Iranian instruments of coercion and Israeli acts of self-defense;
- to require, as an explicit condition of any final agreement, the dissolution of the PGSA and of its functions, which the MOU’s provision for an Iranian-Omani dialogue on the [“future administration”](#) of Hormuz stands ready to reconstitute under a bilateral flag;
- to maintain Israeli operational freedom against Hezbollah rather than allowing an American diplomatic commitment to function as a shield for Iran’s proxies; and
- to rebuild the defense partnership with the Gulf—shelving the [drawdown from Saudi territory](#) now under Pentagon consideration, which would convert the Saudi model’s premise into American policy—on terms that acknowledge the post-October 7 political reality without conceding Riyadh’s false premise that Israel is the source of Gulf insecurity.

Moreover, it is necessary to hold the defense pact, advanced arms, and the civilian nuclear program at the price Washington originally set for them—normalization—rather than allowing the Kingdom to extract the benefits of alignment without committing to the American vision of regional order. The Saudi model is gaining ground because the United States gave it the room and the evidence to advance. The task during the sixty-day negotiating window is to close that space before the false symmetry at its core becomes the settled assumption on which the region’s security order is built.