

From the Grand Mosque Seizure to the Abraham Accords: The Long Arc of Saudi Religious Politics, the Marginalisation of the Palestinian Question, and the Reordering of the Middle East

Abstract

This article argues that the contemporary geopolitical reordering of the Middle East is best understood as the unwinding of a forty-year structural settlement inaugurated by the seizure of the Grand Mosque of Mecca in November 1979. Drawing principally on Allison (2010), and supplemented by the documentary record of US State Department cables and the work of Trofimov (2007) and Hegghammer and Lacroix (2007), the first half of the article reconstructs the siege led by Juhayman al-Utaybi and traces the institutional response of the al-Saud monarchy: a domestic re-empowerment of the Sahwa religious establishment and the deliberate, oil-funded globalisation of Wahhabi-aligned Sunnism through mosques, madrasas, and charitable foundations across Asia, Africa, Europe, and North America. The second half examines three rupturing developments — the social and clerical reordering pursued by Crown Prince Mohammed bin Salman from 2017, the 2020 Abraham Accords and the regional realignments they have catalysed, and President Donald Trump's May 2025 address in Riyadh — and argues that, taken together, these mark the close of the post-1979 framework. The article gives sustained attention to a feature of the new order frequently understated in Western analysis: the marginalisation of the Palestinian question as a precondition for regional diplomacy, in direct contradiction to the linkage doctrine articulated most clearly by US Secretary of State John Kerry in December 2016. The June 2025 Twelve-Day War and the larger 2026 conflict between Israel, the United States, and Iran are analysed as both consolidating the new Sunni Arab–Israeli alignment and producing

conditions — economic, political, and military — under which the Islamic Republic of Iran is now structurally vulnerable to collapse. The article closes with a discussion of the United Arab Emirates' withdrawal from OPEC and OPEC+ on 1 May 2026 and what it signals about the polycentric, transactional, and openly nationalist character of the regional order now emerging.

Keywords: *Saudi Arabia; Wahhabism; Juhayman al-Utaybi; Abraham Accords; Mohammed bin Salman; Iran; Twelve-Day War; OPEC; Palestinian question; Middle East geopolitics*

1. Introduction

On the morning of 20 November 1979 — the first day of the year 1400 in the Islamic calendar — several hundred armed militants led by Juhayman al-Utaybi seized the Grand Mosque of Mecca, declaring one of their number, Mohammed Abdullah al-Qahtani, to be the Mahdi (Allison, 2010; Trofimov, 2007). The siege lasted roughly two weeks, ended with the assistance of French commandos who never themselves entered the holy precinct, and was followed by the largest mass execution in Saudi history (Allison, 2010). For a generation of scholars, the event was treated as a curiosity: a bloody but contained episode in a region whose larger story was thought to be defined by the Iranian Revolution earlier that same year and the Soviet invasion of Afghanistan a few weeks later.

That reading no longer holds. As Allison (2010) argued in her detailed reconstruction of the seizure, the deepest consequences of the siege lay not in the militants' fate but in the Saudi response — a structural reorientation of the Kingdom's domestic politics and, through the apparatus of oil-funded religious diplomacy, of Sunni Islam globally. The al-Saud family, having been forced to seek a fatwa from its own clerical establishment in order to retake the holiest site in Islam, emerged from the crisis convinced that its legitimacy required a more rigorous, more public, and more expansively financed embrace of religious conservatism. The Sahwa movement was empowered at home; abroad, oil revenues were redirected into mosques, madrasas, charities, and Quranic printing on a scale without precedent in modern religious history (Mandaville, 2022).

This article argues that the events of November and December 1979 inaugurated a distinct historical period — roughly a forty-year arc — in which the Kingdom of Saudi Arabia served as the principal patron of a globalised, doctrinally austere, and politically quietist Sunni revivalism. That period is now visibly closing. Three developments mark the rupture: the domestic transformation of Saudi Arabia under Crown Prince Mohammed bin Salman; the 2020 Abraham Accords and the regional realignment they have catalysed; and the diplomatic theatre of President Donald Trump's May 2025 visit to Riyadh, Doha, and Abu Dhabi (White House, 2025; Trump, 2025), at which the United States effectively endorsed a Gulf-led model of regional order.

The article gives particular attention to one underappreciated feature of the new arrangement. The diplomatic doctrine that had organised American and broader Western thinking about the region since at least the 1991 Madrid Conference — the so-called "linkage" thesis, articulated most clearly by US Secretary of State John Kerry in his December 2016 farewell address (Kerry, 2016), which held that no durable peace in the Middle East was possible without a final settlement of the Israeli-Palestinian conflict on the basis of a two-state solution — has been displaced, both rhetorically and operationally, by the post-Abraham Accords framework. The Sunni Arab governments that signed and shadowed the Accords have demonstrated, in successive crises, a willingness to subordinate the Palestinian cause to regional stability and economic integration with Israel (Brown & Telhami, 2025; Middle East Institute, 2025). This is, in itself, an event of historic magnitude in regional politics.

Two further developments — the June 2025 Twelve-Day War between Israel and Iran (Britannica, 2025; FPRI, 2025), its 2026 sequel (House of Commons Library, 2026a, 2026b), and the United Arab Emirates' decision to leave OPEC and OPEC+ in May 2026 (Al Jazeera, 2026; WAM, 2026) — suggest that the post-1979 framework is being replaced not by a single new doctrine but by something more fragmented, more transactional, and more openly nationalist. The article additionally argues, on the evidence currently available, that the combined effect of the June 2025 and 2026 wars, the US naval blockade of Iranian ports, the closure of the Strait of Hormuz, and the underlying collapse of the Iranian rial has rendered the Islamic Republic of Iran structurally vulnerable in a manner without precedent since the 1979 Revolution. The

article traces this transition. It dedicates its first half to the siege and the religious-political order it produced, and its second half to the contemporary unwinding of that order.

2. The Siege and Its Aftermath

2.1. *The Movement and Its Origins*

The men who entered the Grand Mosque before dawn on 20 November 1979 did not arrive from a vacuum. Allison (2010) locates the origin of Juhayman's group in the *Al-Jami'a Al-Salafiyya Al-Muhtasiba* (JSM), a pietistic salafi association founded in the poorer neighbourhoods of Medina in 1966. The JSM was a product of what Allison (2010) calls "the intersection of religion and politics in Saudi society" (p. 2): rapid urbanisation and oil-driven modernisation had generated, by the mid-1960s, a conservative reaction against the visible presence of ARAMCO and the American and European communities its operations sustained. The JSM was anti-Westernisation rather than anti-government. Its critique was directed at innovations and misperceptions within mainstream Wahhabi practice itself, not at the al-Saud monarchy that the Wahhabi clerical establishment underwrote (Hegghammer & Lacroix, 2007).

Tensions within the JSM came to a head in 1977, when senior Saudi scholars confronted the group about its unusual ritual practices. The dispute produced a generational split: older members deferred to the clerical establishment, while a younger faction led by al-Utaybi insisted on continuing regardless (Hegghammer & Lacroix, 2007). Al-Utaybi's faction was driven underground, and it was at this point — as Allison (2010) emphasises — that the movement was "hijacked" and reconstituted under the deliberately provocative name *Ikhwan*, evoking the original tribal-religious militia that Ibn Saud had crushed in the late 1920s.

Al-Utaybi's *Ikhwan* differed from its namesake on a critical point of doctrine. Its commitment was to salafism rather than to traditional Wahhabism, and the group accused the al-Saud regime of "putting an end to jihad and using religion as a means to justify their world interests" (Allison, 2010, p. 2). The argument was set out in a compendium of letters that circulated clandestinely in Saudi Arabia and Kuwait, later

reproduced in part by Ahmad (2004). One passage captures the tone: those who rule by laws other than God's book, the letters argued, have no claim on the obedience of Muslims, and their mandate to rule is nil (Allison, 2010, citing Ahmad, 2004).

The most theologically transgressive feature of the movement was the declaration of the Mahdi. Allison (2010) notes that mainstream Sunni eschatology contains a specific hadith stating that the first man to declare himself Mahdi and take refuge in the Grand Mosque will be killed — a tradition that al-Utaybi's group either dismissed or chose to fulfil deliberately. The Mahdi cannot, in mainstream Sunni doctrine, be planned for; al-Qahtani's candidacy was therefore offensive to virtually all Sunni scholars from the outset.

Saudi security forces had in fact been monitoring al-Utaybi since at least December 1977, when a raid on his headquarters detained thirty of his followers while al-Utaybi himself escaped into the desert (Allison, 2010). The threat the movement posed was not, however, understood in the terms that mattered. The interior ministry treated it as a problem of dissident pamphleteering rather than as a credible armed threat to the regime's most sensitive religious asset.

2.2. The Siege

The attack was timed for the first day of the year 1400 AH, a date of recognised messianic significance. Allison (2010), drawing on a combination of US embassy cables and the work of Trofimov (2007) and Hegghammer and Lacroix (2007), reconstructs the operation in considerable detail. Between 300 and 500 militants were involved. A 40,000-riyal bribe paid to members of the mosque's guard service had granted earlier access to the *Qaboo*, the mosque's underground chambers, into which pickup trucks were driven loaded with rifles, ammunition, and dates. On the morning of the siege, weapons were also smuggled in inside coffins brought, in apparently customary fashion, by pilgrims requesting the Imam's final blessing for deceased relatives (Allison, 2010).

The hajj season had recently ended but the mosque remained crowded with roughly 50,000 worshippers preparing for dawn prayer (Allison, 2010). At 5:25 a.m., gunfire erupted. The mosque's unarmed guards were shot, the gates chained shut, and the

microphone taken from the Imam, Mohammad ibn Sube'il. Al-Utaybi addressed the trapped congregation, declaring authority over Mecca, Medina, and Jeddah, before handing the microphone to the alleged Mahdi's brother, Sayid al-Qahtani, who delivered a classical-Arabic denunciation of the al-Saud regime and Western influence and announced that the *bay'a* previously sworn to the royal family was no longer valid. The Mahdi himself then received the *bay'a* from the militants. Most worshippers were eventually released; perhaps a thousand were retained as hostages (Allison, 2010).

Mecca police arriving at the mosque were killed by sniper fire from the minarets. The defence and interior ministries — under Princes Sultan and Nayef respectively — assumed responsibility, and roadblocks were thrown up around the Kingdom while telephone links were cut (Allison, 2010). The Saudi government did not issue any public statement until the morning of 21 November, when the Interior Ministry described "a group of renegades" and noted that religious leaders were being consulted about appropriate measures (Allison, 2010, p. 4). That delay was not bureaucratic; it was theological. Combat inside the Grand Mosque required a fatwa from the senior ulama, and the regime — its legitimacy precariously dependent on its custodianship of the holy sites — could not act without one.

The fatwa was issued on 23 November (Allison, 2010). Even with clerical authorisation, the recapture proved extraordinarily difficult. The mosque was undergoing structural renovation, and the Ka'ba itself was reported to be unsound; major explosions risked the collapse of the holiest object in Islam. Initial assaults using flash-bang weapons were repulsed. Sixth Battalion rangers blew the Marwa Gate off its hinges only to be ambushed in the gallery beyond. American helicopter pilots flying reconnaissance reported sniper positions in the twin minarets equipped with at least one .50 calibre machine gun and "very well organized" defenders who repositioned constantly (Allison, 2010, p. 4).

The decisive offensive came on 23 and 24 November, when the Saudi Army deployed armoured personnel carriers and TOW anti-tank missiles against the minaret positions (Allison, 2010). The APCs were not invulnerable; militants threw Molotov cocktails into their cockpits. But the Marwa-Safa gallery was eventually cleared, the

main courtyard taken, and most surviving militants — including al-Utaybi and al-Qahtani — driven into the *Qaboo*. The final fighting in the underground tunnels lasted another ten days. Allison (2010), citing US embassy cables and Trofimov (2007), documents that French commandos arrived in Riyadh on 29 November to direct operations from outside the mosque, non-Muslims being prohibited from entering Mecca itself; they also supplied tear gas and ammunition. The operation concluded on 4 December. Al-Qahtani was killed and identified by his brother. Al-Utaybi was captured alive (Allison, 2010).

2.3. *The Reckoning*

On 9 January 1980, sixty-three men were beheaded simultaneously in eight Saudi cities — the largest mass execution in the Kingdom's history (Allison, 2010). The list of those executed included forty-one Saudis, ten Egyptians, seven Yemenis, three Kuwaitis, an Iraqi, and a Sudanese — a composition that already, in 1980, hinted at the transnational character of salafi networks. Many participants in the siege were not executed; they were imprisoned, often for long terms, and the regime's broader sweep also detained members of the original JSM and others connected to al-Utaybi's *Ikhwan* who had not been present at the mosque (Allison, 2010).

Allison's (2010) most important contribution is her insistence that al-Utaybi's movement was not the direct ideological forefather of al-Qaeda. The differences are significant. Al-Utaybi made a careful distinction between an illegitimate regime and the individuals who comprised it: rulers who claimed to be Muslims could not, in his view, be excommunicated as individuals through *takfir* (Hegghammer & Lacroix, 2007). Al-Qaeda's later doctrine collapsed precisely this distinction. Al-Utaybi's discourse, moreover, was almost entirely focused on the Saudi state; transnational jihadism, by contrast, takes the international order itself as its target. The figure who genuinely transmitted al-Utaybi's textual influence into later jihadi-salafi thought was the Palestinian-Jordanian cleric Abu Muhammad al-Maqdisi, whose *Millat Ibrahim* borrowed extensively from al-Utaybi's letters and was disseminated through Kuwaiti networks descended from the original JSM (Allison, 2010; al-Maqdisi, n.d.). Al-Maqdisi himself

would later become a sharp critic of Osama bin Laden and Abu Musab al-Zarqawi (Allison, 2010).

The deeper consequences of the siege were thus not ideological but institutional, and they unfolded inside the Saudi state itself.

2.4. The Counterintuitive Lesson: Embrace, Not Suppression

The instinctive Western reading of the siege is that the al-Saud crushed the militants and moved on. The reality, as Allison (2010) and the moderate Saudi scholar Khalil al-Khalil have both observed, was the opposite: the militants were defeated militarily and largely accommodated ideologically. Al-Khalil's recollection captures the texture of the change: Saudi television, he noted, "wasn't the same Saudi television after Juhayman's attacks in Mecca," and the previously co-educational university classrooms were re-segregated; a "tense environment that was really terrible" continued, he said, "for many years," and "it contributes to what we are about today" (al-Khalil, 2003, as cited in Allison, 2010, p. 7).

The reforms announced by King Khaled and Crown Prince Fahd in the months that followed — the proposed *Majlis al-Shura*, the draft governmental by-laws, the strengthened gun-control legislation, the harsher posture toward dissident movements regardless of size — should be understood in this light (Allison, 2010). They were components of a broader settlement in which the regime acknowledged, in effect, that Juhayman's *critique* (the al-Saud were insufficiently Islamic) could be defused only by a credible demonstration that the regime was, in fact, the indispensable enforcer of Islamic norms. The settlement had two faces. Internally, the Sahwa political-religious tendency was given expanded influence over education, public morality, broadcasting, and the religious police. Externally, the regime committed an unprecedented share of its oil revenues to the global propagation of its preferred doctrinal idiom (Mandaville, 2022; Commins, 2009).

2.5. The Globalisation of Wahhabism

The scale of what followed has no precedent in modern religious history. Estimates compiled by Mandaville (2022) and others suggest that Saudi state and quasi-state

spending on the international propagation of Wahhabi-aligned Sunnism between the mid-1970s and the mid-2000s ran to between US\$70 billion and US\$100 billion (Dorsey, 2017; European Parliament, 2013). The European Parliament (2013) has cited a more conservative figure of approximately US\$10 billion routed through major charitable foundations such as the Muslim World League, the World Assembly of Muslim Youth, the International Islamic Relief Organization, and the al-Haramain Foundation. Between 1975 and 2000, more than 1,500 mosques were built worldwide with Saudi public funds; between 1964 and 2004, approximately 1,359 mosques, 210 Islamic centres, 202 colleges, and 2,000 schools were established with Saudi support in non-Muslim-majority countries alone (Mandaville, 2022). A massive Quran printing complex was opened in Medina in 1984.

The Cold War provided a strategic accelerant. Saudi religious networks operated, throughout the 1980s, in a tacit partnership with the United States and Pakistan in the support of the Afghan mujahideen — the war that would, as Allison (2010) observes, transform the Kingdom's "stick and carrot" model of domestic management into a globally consequential export industry (p. 7). Saudi oil money channelled into Pakistani madrasas helped produce the demographic and ideological substrate from which both the Taliban and a generation of Arab fighters subsequently emerged (Coll, 2004). The Iranian Revolution, with its Shia revolutionary universalism, raised the perceived stakes considerably; the Saudi response was to redouble its investment in Sunni doctrinal infrastructure as a counterweight, particularly in countries with significant Shia or potentially convertible populations such as Indonesia, Pakistan, and parts of sub-Saharan Africa (Lacroix, 2011; Mandaville, 2022).

Two qualifications are essential. First, as Mandaville (2022) and other scholars have cautioned, headline figures are unreliable, the funding flows were heterogeneous, and not all Saudi religious diplomacy was directed at conservative doctrinal export — some funded conventional aid, university scholarships, and diplomatic engagement. Second, Saudi Wahhabism is not jihadism, and the Saudi state did not seek the violent overthrow of governments. As Allison's (2010) framework reminds us, traditional Wahhabism is politically quietist: its doctrinal austerity is tethered to deference to constituted Muslim authority. The trouble was that the doctrinal infrastructure produced

through Saudi expenditure proved separable from the political settlement under which it had been generated. Once translated, printed, taught, and broadcast at scale, the austere theology could be — and was — picked up by movements whose political conclusions the Saudi state did not share and would eventually find directly threatening to itself (Hegghammer, 2010).

The blowback was severe. The 1995 Riyadh bombing, the 1996 Khobar Towers attack, the role of Saudi nationals among the 9/11 hijackers, and the emergence of al-Qaeda in the Arabian Peninsula all bore some relation, however indirect, to the doctrinal ecosystem the Kingdom had cultivated (Hegghammer, 2010; Wright, 2006). By the early 2000s, the Saudi state was confronting domestically a network of militants whose theological vocabulary it had itself helped globalise. The Islamic State, two decades later, would represent the most extreme distillation of this dynamic — a movement that explicitly described the Saudi monarchy as apostate while drawing on a theological lexicon substantially shaped by Saudi-funded institutions (Bunzel, 2015).

This is the deep meaning of 1979. The siege did not produce al-Qaeda; it produced the conditions under which a particular reading of Sunni Islam acquired, through state patronage, the global infrastructure that movements like al-Qaeda would later exploit. The arc that began in November 1979 — the Saudi state, traumatised by an attack on its religious legitimacy, choosing to consolidate that legitimacy through ever-more-expansive religious patronage — defined the theological and to a significant extent the political topography of the Sunni world for nearly four decades.

3. The Unwinding

3.1. Mohammed bin Salman and the Reordering at Home

The break from the post-1979 settlement did not occur all at once, and it cannot be attributed to a single actor. Saudi religious-political conservatism had attracted internal criticism well before the 2010s, particularly in the wake of 9/11 and the rise of the Islamic State, both of which were taken by reformist voices within the Kingdom as evidence that the bargain struck with the Sahwa establishment had become unsustainable (Lacroix, 2011). But the decisive shift is associated with Crown Prince

Mohammed bin Salman, who consolidated power between 2015 and 2017 and was formally elevated to the position of crown prince in June 2017 (Hubbard, 2020).

The reforms enacted under Mohammed bin Salman are most visible in the lifestyle changes long denied to Saudi citizens. The lifting of the ban on women driving in 2018, the partial dismantling of male guardianship requirements for travel and employment, the curtailment of the religious police, the reopening of cinemas, the staging of mixed-gender entertainment events, the easing of dress codes, and the licensing of tourism to non-Muslim visitors all represent reversals of practices that, as Allison (2010) and al-Khalil (2003) noted, were tightened or institutionalised in the immediate aftermath of the 1979 siege. *Vision 2030*, the broader programme announced in 2016, explicitly framed these changes as integral to economic diversification: an oil-revenue-dependent Kingdom whose religious-political order discouraged female labour-force participation, foreign tourism, and entertainment-sector investment was simply not capable of generating the post-hydrocarbon economy it required (Saudi Vision 2030, 2016).

Less visible but more consequential has been the systematic rebalancing of state and clergy. The 2017 mass detention of religious figures, including senior Sahwa scholars, signalled that the political-religious settlement that had emerged from the post-1979 period was no longer protected (Lacroix, 2019). The Crown Prince has spoken in international forums of returning the Kingdom to a "moderate Islam" that, in his telling, prevailed before 1979 (Mohammed bin Salman, 2017, as cited in Wood, 2018) — a historical claim that is contestable but politically functional, since it locates the ideological excess that requires correction precisely at the moment Allison (2010) identifies as foundational. International funding flows have also been visibly curtailed: major Saudi-affiliated proselytisation foundations have been restructured or wound down, and financing for foreign mosques and madrasas has been more tightly regulated (Mandaville, 2022).

Mohammed bin Salman is a controversial figure in Western capitals, and the controversy is not unfounded. The 2018 murder of the journalist Jamal Khashoggi inside the Saudi consulate in Istanbul drew international condemnation and a temporary cooling of relations with the United States and key European partners (Hubbard, 2020).

The war in Yemen, the prosecution of activists, and the centralisation of power within a single branch of the al-Saud family raise legitimate concerns about the political character of the regime that is producing these reforms. But it is analytically important to separate the question of the Crown Prince's methods from the question of the historical break he represents. Whatever else may be said about Mohammed bin Salman, the religious-political order that emerged from 1979 — the implicit bargain by which the regime traded social and educational liberalisation for clerical legitimacy at home and exported austere Sunnism abroad — is no longer the operating framework of the Saudi state.

3.2. The Abraham Accords and the Marginalisation of the Palestinian Question

The second axis of the unwinding is regional, and its significance for the Palestinian question deserves to be stated clearly because it is regularly elided in both diplomatic communiqués and academic commentary. The Abraham Accords, signed in September 2020 between Israel and the United Arab Emirates and Bahrain, and shortly thereafter joined by Sudan and Morocco (US Department of State, 2020), broke a sixty-year Arab consensus that the normalisation of relations with Israel was conditional on the establishment of a Palestinian state. The Accords' signatories defended their decision in pragmatic terms: Iran, not Israel, had become the principal regional adversary; the Palestinian leadership had ceased to function as a coherent diplomatic interlocutor; and the economic and technological gains from open relations with Israel were too significant to forgo (Middle East Institute, 2025; Britannica, 2026).

This was a deliberate inversion of the framework that had organised Western and most Arab thinking about the region for at least a generation. The doctrine — most prominently associated in recent memory with US Secretary of State John Kerry and the Obama administration — held that no durable peace in the wider Middle East was achievable without a final settlement of the Israeli-Palestinian conflict on the basis of two states. In his December 2016 farewell address at the State Department, Kerry (2016) put the proposition in unambiguous terms: "the two-state solution is the only way to achieve a just and lasting peace between Israelis and Palestinians," and the

alternative was "fast becoming the reality on the ground" in a way that would generate "greater conflict and instability" across the region. The 2002 Arab Peace Initiative, sponsored by Saudi Arabia and endorsed by the Arab League, formalised the linkage from the Arab side: full normalisation in exchange for full Israeli withdrawal and a Palestinian state with East Jerusalem as its capital (Britannica, 2026).

The Abraham Accords did not merely fail to advance the linkage doctrine; they functionally repudiated it. As Munayyer (2025) has argued in a recent assessment for Foreign Affairs, the Accords "effectively supplanted the Saudi government's Arab Peace Initiative" by establishing that normalisation, the bilateral economic and security ties it produced, and the diplomatic upgrading of Gulf-Israeli relations could proceed without any meaningful progress on Palestinian statehood. The text of the agreements barely mentioned the Palestinians (Cleveland Council on World Affairs, as cited in Munayyer, 2025; Yale Review of International Studies, 2024). Subsequent events have confirmed the repudiation. When violence erupted at the Al-Aqsa Mosque in April 2021 — an incident that, in earlier decades, would have been treated as an unacceptable provocation against both Palestinians and Sunni Islam itself — Emirati and Bahraini responses were notably muted, and normalisation proceeded apace (Munayyer, 2025). When the Hamas attack of 7 October 2023 and the ensuing Israeli campaign in Gaza produced humanitarian conditions that drew widespread international condemnation, the Accords' Sunni Arab signatories did not withdraw, did not downgrade their diplomatic representation, and did not impose meaningful economic costs.

This is not because the Palestinian question has been forgotten by Arab publics. Public opinion across the Arab world remained, throughout the post-2023 period, broadly sympathetic to the Palestinians and broadly critical of Israel (Arab Barometer, 2024). It is, rather, because the Sunni Arab governments that signed the Accords concluded that the strategic and economic benefits of normalisation — counter-Iranian alignment with Israel, access to Israeli surveillance and military technology, integration into US-anchored regional defence architecture, and the commercial dividends of open trade and investment relations — exceeded the political costs of decoupling state policy from Palestinian solidarity (Atlantic Council, 2025; Washington Institute, 2025). Saudi Arabia, while not a signatory in 2020, has been the central object of subsequent

expansion efforts and has materially shifted its posture: Israeli overflights have been permitted, intelligence cooperation has expanded, and the Saudi-Israeli normalisation track was reportedly close to completion in late 2023 before the Hamas attack interrupted it (Middle East Institute, 2025).

The implications for the linkage doctrine are stark. If the Accords' premise is correct — that regional stability and prosperity can be advanced through Sunni Arab–Israeli integration without a Palestinian state — then the Kerry framework is not merely wrong about the means of Middle Eastern peace; it is wrong about the structure of the problem. Critics of the Accords have argued, conversely, that the 7 October attack and its aftermath are precisely the evidence that the Palestinian question cannot be safely sidelined, and that the appearance of stability produced by the normalisation process is purchased at the cost of accumulating tension that will eventually rupture (Munayyer, 2025; Yale Review of International Studies, 2024). Both interpretations have analytical merit. What is no longer in serious dispute, however, is that Arab government policy — as distinct from Arab public opinion — has decisively moved toward a position in which the Palestinian cause is treated as one regional file among many rather than as the indispensable precondition for regional diplomacy. This is, in itself, a transformation of historic magnitude, and it is the most consequential single feature of the post-1979 unwinding now underway.

The deeper significance is doctrinal as well as diplomatic. The post-1979 framework, in which Sunni Arab states defined their political legitimacy partly in reference to a confrontation with Israel and a defence of Sunni Islamic universalism, has been replaced by a more openly *raison d'état* posture in which national interests are pursued without the mediating vocabulary of pan-Islamic solidarity. The UAE has been particularly explicit about this: Abu Dhabi has positioned itself as a hub of religious moderation — the founding of the Abrahamic Family House in 2023, hosting churches and a synagogue alongside a mosque, was a deliberate signal — and as a sceptical voice within the wider Arab system about the political utility of Islamism in any form, including the Muslim Brotherhood variants the Accords' Sunni signatories have all moved to suppress (Roberts, 2017).

3.3. Trump in Riyadh, May 2025

Donald Trump's May 2025 visit to Saudi Arabia, Qatar, and the United Arab Emirates served, in retrospect, as the diplomatic confirmation of these shifts. The address Trump (2025) delivered at the Saudi-US Investment Forum in Riyadh on 13 May 2025 was deliberately constructed to mark a break with three decades of American policy in the region. Five elements of the speech merit particular attention.

First, the framing of regional transformation as indigenous achievement. Trump (2025) praised the visible economic and infrastructural development of the Gulf — the "gleaming marvels" of Riyadh and Abu Dhabi, the rise of Dubai, Doha, and Muscat — and credited it explicitly to local leadership rather than to Western intervention or donor diplomacy: "This great transformation has not come from Western interventionists ... giving you lectures on how to live or how to govern your own affairs. No, the gleaming marvels of Riyadh and Abu Dhabi were not created by the so-called 'nation-builders,' 'neo-cons,' or 'liberal non-profits,' like those who spent trillions failing to develop Kabul and Baghdad" (White House, 2025). The rhetorical structure here is significant: the source of regional success is located in the same heritage and traditions that, two decades earlier, the Bush administration had argued required forceful liberalisation.

Second, the explicit repudiation of nation-building. "In the end, the so-called 'nation-builders' wrecked far more nations than they built — and the interventionists were intervening in complex societies that they did not even understand themselves" (Trump, 2025). The line, delivered in Riyadh, was a rebuke not only of the 2003 invasion of Iraq — which Saudi Arabia had warned against at the time (Arab News, 2025) — but of the entire post-Cold War American project of democratisation through military and civil-society engagement. As Roggeveen (2025) of the Lowy Institute observed, the rejection extended beyond neoconservatism to liberal internationalism more broadly.

Third, a substantive foreign-policy turn. Trump (2025) announced from the Riyadh stage the lifting of US sanctions on Syria and signalled willingness to engage Iran diplomatically. Both moves were credited to the influence of Crown Prince Mohammed bin Salman, who according to attendees of the Forum responded to the Syria announcement with a visible standing ovation that brought the room to its feet (Tahrir

Institute for Middle East Policy, 2025). The choice of Riyadh as the venue for these announcements was a deliberate signal that the United States now regards Gulf capitals as legitimate sites of consequential diplomacy.

Fourth, the transactional and economic frame. The visit produced a US\$600 billion Saudi commitment to invest in the United States and a reported US\$142 billion defence sales agreement, alongside a series of technology and energy partnerships announced in Doha and Abu Dhabi (Arab Center Washington DC, 2025). The framing was insistently commercial: peace, in the Trump administration's account, would emerge from the entanglement of national interests through investment rather than from the imposition of common political values.

Fifth, the Abraham Accords. Trump (2025) expressed open hope that Saudi Arabia would join the Accords and presented this expansion as the natural endpoint of the regional trajectory he was endorsing. The implication — that a normalised, economically integrated, and defensively cooperative Sunni Arab–Israeli bloc could provide the architecture of regional stability without prior resolution of the Palestinian question — was the explicit operational rejection of the Kerry (2016) framework.

The Riyadh speech is best read as the obverse of the Saudi reaction to the 1979 siege. Where the al-Saud responded to the Grand Mosque crisis by deepening their reliance on a particular doctrinal-religious legitimacy and globalising it through oil-funded networks, the framework Trump (2025) endorsed in 2025 explicitly relinquishes any external normative project and instead validates the Gulf states' own model of authoritarian modernisation, religious moderation, and economic integration as both legitimate in itself and worthy of US partnership.

3.4. The Twelve-Day War, the 2026 Conflict, and the Coming Crisis of the Islamic Republic

If the Riyadh speech sketched a vision, events accelerated it within weeks. On 13 June 2025 — two days before the sixth round of US-Iran nuclear talks were scheduled to take place in Oman — Israel initiated a major military operation against Iran (GIGA, 2025; Britannica, 2025). The conflict, which became known as the Twelve-Day War, drew in

the United States after several days of fighting; American strikes targeted the most heavily fortified components of Iran's nuclear infrastructure that Israeli aircraft could not reach. A ceasefire was announced by President Trump on 23 June and came into effect on 24 June (House of Commons Library, 2025).

The war's military results were striking. The Israeli Air Force established what it described as full aerial superiority over Iran within days, and the regime's air defences — including imported Russian S-300 batteries and domestically produced systems — proved largely ineffective (FPRI, 2025a). Senior Iranian political and military figures were killed; Iran's regional partners, already weakened by the Israeli campaigns of 2023 and 2024 against Hamas and Hezbollah, were further degraded. The "Axis of Resistance" was, in the assessment of multiple analysts, dismembered (FPRI, 2025b).

The war's economic and political aftershocks proved more decisive than its military results in isolation. The rial, already under pressure from sanctions, lost approximately sixty per cent of its value in the months following the ceasefire (CNBC, 2026). By March 2025 the exchange rate had passed one million rials to the US dollar, and by January 2026 it had reached 1.4–1.5 million on the open market, before falling further to roughly 1.75 million by December 2025 (Iran International, 2026; Wikipedia, 2026, drawing on Time, Euronews, and Al-Monitor). Inflation exceeded fifty per cent in 2025; food price inflation reached seventy per cent (House of Commons Library, 2026c). Beginning on 28 December 2025, large-scale protests erupted across all thirty-one Iranian provinces (House of Commons Library, 2026c; Al Jazeera, 2026b). The state response was a crackdown of historic severity, with credible estimates of fatalities ranging from 3,000 to 36,500 — figures that, if accurate, would constitute one of the largest massacres in modern Iranian history (Wikipedia, 2026, citing multiple sources).

On 28 February 2026, Israel and the United States launched a second joint operation against Iran, codenamed Operation Roaring Lion in Israel and Operation Epic Fury in the United States (House of Commons Library, 2026a). The campaign targeted Iranian nuclear facilities, military installations, and government infrastructure. Supreme Leader Ali Khamenei was killed in the strikes (House of Commons Library, 2026a). Iran's reply included missile barrages against Israel, US bases in the region, and —

significantly — civilian and military targets in Bahrain, Jordan, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. Iran also announced the closure of the Strait of Hormuz, through which approximately twenty per cent of global petroleum and LNG had passed before the conflict (House of Commons Library, 2026b). A conditional ceasefire was declared on 8 April 2026, with talks subsequently mediated by Pakistan; as of early May 2026, vessel traffic through the strait remains at approximately five per cent of pre-war levels and the United States has imposed a counter-blockade on Iranian ports (House of Commons Library, 2026b).

The cumulative effect of these developments is, in the analysis of this article, decisive: the Islamic Republic is now confronting a structural crisis from which its survival in anything resembling its current form is increasingly difficult to project. Three converging mechanisms warrant emphasis.

The first is fiscal. Oil exports — historically the basis of approximately one quarter of Iranian government revenue (Fortune, 2026) and as much as eighty per cent of foreign-currency earnings — have collapsed under the combined pressure of UN snapback sanctions reimposed in October 2025 (House of Commons Library, 2026c), the US naval blockade of Iranian ports, and Tehran's own closure of the Strait of Hormuz. The Iranian Revolutionary Guard Corps, which according to Fortune (2026) processes approximately half of national oil exports and had stood to profit from tolls on shipping through the strait, faces a direct contraction of its principal patronage revenue. Iran's central bank reportedly informed President Pezeshkian's government in April 2026 that the Republic faced 180% inflation, two million additional unemployed citizens, and a twelve-year reconstruction horizon — even if sanctions were lifted (Israel Hayom, 2026, citing Iran International).

The second is political. The protests of late 2025 and early 2026 differed from earlier waves (2009, 2017–18, 2019, 2022) in their geographic universality, their socio-economic breadth, and their explicit anti-regime character. They were initiated not by middle-class students but by the merchants of the Tehran Grand Bazaar — historically among the regime's most reliable bases of support (Euronews, 2026) — and they spread through provincial cities typically considered loyal (House of Commons Library,

2026c). The chants reported from those protests ("Death to the dictator," "Death to Khamenei") and the subsequent killing of the Supreme Leader himself in February 2026 have transformed the symbolic landscape in which the regime operates. Khamenei's son has been appointed as successor (House of Commons Library, 2026b); the durability of that succession is unproven.

The third is the erosion of the regime's coercive base. The IRGC and the broader pasdaran apparatus have, since the 1990s, functioned as a hybrid security-economic complex, with major engineering subsidiaries, control of significant portions of the oil and contraband trade, and an extensive network of patronage that bound officers and rank-and-file to the regime's survival (Euronews, 2026; Quincy Institute, 2025). The blockade and the collapse of the rial threaten that complex from both sides simultaneously: oil revenues are being squeezed, contraband margins are being eroded by enhanced US enforcement against Chinese banks facilitating Iranian transactions (Brookings, as cited in CNBC, 2026), and inflation is destroying the real value of officer salaries. A regime whose security apparatus depends materially on patronage cannot sustain that apparatus when the patronage runs out. The historical analogy is imperfect, but the structural parallel to the late Soviet period — in which the security and military elite, faced with the visible fiscal exhaustion of the system, ceased to defend it — is closer than is comfortable for the regime.

None of this constitutes a prediction that the Islamic Republic will fall on a particular timetable. Authoritarian regimes can endure remarkable economic distress, and Iran has done so before. But the post-2026 configuration is different in kind from earlier crises. The combination of a destroyed deterrent, a delegitimised succession, a population that has openly rejected the regime, an economy in measurable freefall, and a security apparatus whose material foundations are being eroded amounts to a structural vulnerability that the Republic has not previously faced. The Sunni Gulf states — particularly Saudi Arabia and the UAE, whose territories were targeted by Iranian missiles in February and March 2026 — have drawn the obvious conclusion. Whatever residual logic existed for hedging between Washington and Tehran has been eliminated. The strategic case for Saudi-Israeli normalisation, in particular, has become more compelling rather than less.

3.5. The UAE Leaves OPEC

If the wars with Iran clarified the security architecture of the post-1979 Gulf, the United Arab Emirates' decision to withdraw from OPEC and OPEC+, announced on 28 April 2026 and effective 1 May, clarifies the economic one (WAM, 2026; Al Jazeera, 2026a). The UAE, which had been a member of OPEC first through the emirate of Abu Dhabi from 1967 and then in its own right from 1971, framed the decision as a focusing of effort on national interests in light of "long-term strategic and economic vision and evolving energy profile" (WAM, 2026).

The substantive logic is straightforward. The UAE's production capacity had grown to approximately 4.8 million barrels per day before the 2025 war, but its OPEC quota constrained it to 3.2 million (Al Jazeera, 2026a). The disagreement over production discipline reflected a deeper divergence: Saudi Arabia's strategy, particularly under Mohammed bin Salman, is to maintain higher long-run prices through coordinated supply restraint, both to fund *Vision 2030* and to manage the politics of an inevitable energy transition (Al Jazeera, 2026a). The UAE's approach, in the assessment of Bond (2026, as cited in Al Jazeera), is the opposite — to maximise current production and monetise as much of its hydrocarbon endowment as possible before global demand peaks. Both strategies are defensible; they are not, in the long run, compatible.

The political subtext is more revealing. The UAE-Saudi relationship has frayed in recent years over Yemen — where the two countries have backed different factions and, in late 2025, Saudi forces bombed what they described as a weapons shipment to UAE-aligned Yemeni separatists (Al Jazeera, 2026a) — and over the wider regional balance. Abu Dhabi has cultivated a distinct foreign policy posture: deeper relations with the United States, closer ties to Israel, an active interest in the Horn of Africa and the Red Sea, and a markedly more sceptical view than Riyadh of any role for political Islamism (Roberts, 2017). The OPEC withdrawal formalises a pattern of independent action that has been visible for some years.

The market consequences are likely to be more limited in the short term than the symbolism suggests. With the Strait of Hormuz partially closed, neither Saudi Arabia nor the UAE can easily export at the levels their capacities permit, and the UAE's Fujairah

terminal on the Gulf of Oman bypasses the choke point only to a degree (Al Jazeera, 2026a). Over the medium term, however, the departure removes from the cartel a member with meaningful spare capacity — one of only two — and weakens the institutional cohesion of OPEC+ at precisely the moment when peak oil demand projections are converging on the late 2020s and early 2030s. As Bond (2026, as cited in Al Jazeera) observed, the UAE is preparing for "a world after the Iran war where oil demand is in decline, and OPEC's power to maintain control and discipline will be weaker."

The withdrawal also signals that the Gulf is no longer prepared to organise its economic affairs under the assumption of permanent Saudi leadership. The post-1979 period in which Saudi Arabia served simultaneously as the religious centre of the Sunni world, the swing producer of the global oil market, and the senior partner in any regional Arab consensus is closing. What is replacing it is more polycentric: Abu Dhabi as a financial and technological hub with its own foreign policy, Doha as a mediation centre with substantial soft power, Riyadh as the largest economy and continuing custodian of the holy sites, but no longer as a unique or hegemonic centre of either religious authority or economic coordination.

4. Conclusion

The argument advanced in this article is that the contemporary reordering of the Middle East is best understood as the unwinding of a structural settlement inaugurated in November 1979. The siege of the Grand Mosque produced, through the Saudi state's response to it, a forty-year framework characterised by oil-funded global propagation of Wahhabi-aligned Sunnism, domestic Sahwa empowerment, and an Arab consensus organised around the Palestinian question and confrontation with Israel. That framework is being replaced. Mohammed bin Salman's domestic reforms have dismantled the post-1979 social settlement; the Abraham Accords have replaced linkage diplomacy with Sunni Arab–Israeli normalisation; the Trump administration's Riyadh declaration of May 2025 endorsed the new framework from the American side; and the wars with Iran

of 2025 and 2026 have eliminated the principal regional opponent of that framework while creating the conditions for the structural collapse of the Islamic Republic itself.

Three implications follow. First, the linkage doctrine articulated by Kerry (2016) and shared across Democratic and much European foreign-policy thinking — that no Middle East peace is possible without a final settlement of the Israeli-Palestinian conflict — has been operationally falsified by the willingness of Sunni Arab governments to pursue stability and prosperity through normalisation while the Palestinian question remains unresolved. Whether this falsification proves durable, or whether the unaddressed Palestinian question eventually ruptures the post-Accords settlement (Munayyer, 2025), is the principal contested question of regional politics for the coming decade. What is no longer in dispute is that Arab government policy, as distinct from Arab public opinion, has moved decisively away from the linkage premise.

Second, the Iranian configuration that emerges from the 2026 war is qualitatively different from any previous crisis of the Islamic Republic. Earlier confrontations preserved the regime's deterrent, its symbolic leadership, and the patronage flows that bound the IRGC and pasdaran to the system. The current configuration removes all three simultaneously while imposing fiscal pressures that the regime's central bank itself describes as catastrophic (Israel Hayom, 2026). On the available evidence, the Republic's continued survival in anything resembling its current form is a less likely outcome than its collapse — though the timing, character, and successor configuration of any such collapse remain substantially undetermined.

Third, the post-1979 doctrinal infrastructure cannot be unwound at the speed of state decisions. The mosques are still there. The texts are still in circulation. The graduates of the schools and universities are still teaching. The intellectual universe that Allison's (2010) article helped reveal — in which al-Utaybi's writings could be transmitted, transformed, and weaponised by figures like al-Maqdisi a generation later — does not disappear because its sponsoring state has changed course. Whether the post-1979 doctrinal ecosystem produces further political consequences in the coming decades, in forms that no one currently anticipates, is the open question that any honest assessment of the present transition must hold open.

What can be said with confidence is that the framework which began at dawn on 20 November 1979 — the Saudi state's response to a theological crisis through the deliberate, oil-funded globalisation of a particular reading of Islam, accompanied by an Arab consensus organised around the Palestinian cause and confrontation with Israel — is no longer the operating system of the region. The Middle East is being reorganised around different principles: explicit national interest, transactional economic integration, an alliance structure that includes Israel, the marginalisation of pan-Islamic and pan-Arab vocabularies as the basis of state policy, and an increasingly polycentric Gulf. Whether this constitutes a more stable order than its predecessor, or merely a different one, is the central question that will define the geopolitics of the region for the remainder of the decade.

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