

New Ambitions at Sea: Naval Modernisation in the Gulf States

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Cover

A US Navy Martin UAV drone flies over the Gulf waters as Royal Bahrain Naval Force (RBNF) Abdulrahman Al Fadhel takes part in joint naval exercise between US 5th Fleet Command and Bahraini forces, on October 26, 2021. - The US and Bahrain navies conducted a joint exercise at sea, launching a series of drills integrating unmanned systems into regional maritime operations. (Photo by Mazen Mahdi / AFP) (Photo by MAZEN MAHDI/AFP via Getty Images)

Executive Summary

- Historically, Gulf states have given lower priority to their naval forces compared to the other branches of their militaries. Nine factors have impeded or slowed their naval modernisation, not least the reliance on the United States presence in the Gulf. In the past decade, leaders there have started to doubt the US security commitment to the region. Washington's attempt to recalibrate its posture and the growth of the Iranian maritime threat – both in capability and ambition – have given rise to new defence thinking in the Gulf.
- Prompted by the US, the Gulf states are assuming a larger share of maritime-security responsibilities in their regional waters. This development is evidenced by their increasing cooperation and growing investments in naval assets, including ships, bases and indigenous industrial capacities. From 2014–22, the number of Gulf-state vessels grew from 512 to 621. Ensuring the operational readiness and performance of these newly owned platforms will take time. However, all the Gulf states (spearheaded by the UAE and Saudi navies) made progress at sea in this period – in terms of their ability to conduct asymmetric warfare, or in tactical and operational thinking. Advancing their strategic and security agenda in the maritime domain is now a priority.
- Drawing from field research, interviews and interpretation of collected defence data, this research paper draws three key conclusions. Firstly, the regional maritime-security architecture is likely to remain dependent on the US for the foreseeable future, albeit less so than in previous decades. Secondly, it will be increasingly cooperative, as the US urges its partners to share the burden as part of its 'integrated deterrence' strategy. Thirdly, the role of Israel is likely to grow, although it remains to be seen how this development will affect the regional balance of power at sea.
- Overall, Gulf states' naval modernisation should be seen as part of wider thinking on regional deterrence and containment to avoid conflict. To complement the US posture of deterrence by punishment, the Gulf states are enhancing deterrence by denial and by detection at sea. The former, which aims to discourage an aggressor from attacking by reducing the likelihood that they will hit their target, requires bolstering local early-warning capabilities, air-defence systems at sea, and asymmetric warfare. Deterrence by detection aims to keep the spotlight on Iran and its proxies' malign behaviour at sea. The deployment of uncrewed capabilities could indeed limit Tehran's resort to plausible deniability.

Introduction

To shed light on the complex issue of naval modernisation in Gulf states, the author interviewed over 25 current or retired military officers, diplomats, scholars and analysts with extensive experience in Gulf and maritime security. These interviews also involved two empirical surveys. Firstly, 22 interviewees identified the three major factors (out of nine) that have historically impeded the development of the Gulf Cooperation Council (GCC) navies (see Figure 1.1). These nine factors were identified by the author through preliminary discussions and readings. Secondly, 14 interviewees agreed to rank the 'naval ethos' of the six Gulf states and Iran (see Figure 3.4). Naval ethos is defined by the author as a combination of a crew spirit with a will to sail for days; an enduring determination to build, operate and maintain ships; and high technical skills.

Gulf regional waters have been guarded mostly by US ships ever since then US president Jimmy Carter ramped up the American presence in 1980. The significant US role there largely explains why for many years Gulf states gave a low priority to their navies. However, other factors have played a significant role in impeding naval modernisation in the region, such as the level of naval ethos, the availability of manpower and the perception of maritime threat. From the early 2010s, two developments compelled Gulf states to invest greater effort and resources into building

their naval forces. Firstly, they started to doubt the US security commitment to the region. In an address in Tokyo in 2009, then US president Barack Obama presented himself as 'America's first Pacific president', laying the groundwork for his looming pivot to Asia.¹ Secondly, the Gulf began to perceive more acutely the growing Iranian threat, including at sea.² Significant naval acquisitions have subsequently taken place.

This research paper examines the evolution of the rationales and drivers behind Gulf states' naval modernisation. It also investigates the features and shortcomings of this build-up. Ultimately, the analysis aims to improve understanding of the emerging security architecture in the region. In so doing, it highlights two shared characteristics of GCC countries: they have all demonstrated a willingness to take on a larger share of maritime-security responsibilities in their regional waters, including in the Red Sea (although their naval-combat capability remains unproven so far); and, despite a common objective being to mitigate their dependence on the US at sea, they are aware that the US will remain the dominant regional player – and the key variable to which they must adjust – for the foreseeable future. Cooperation has become the preferred way to bolster regional maritime security, illustrated by the development of task forces and maritime initiatives.

Chapter One: The Low Priority of Gulf-state Navies Historically

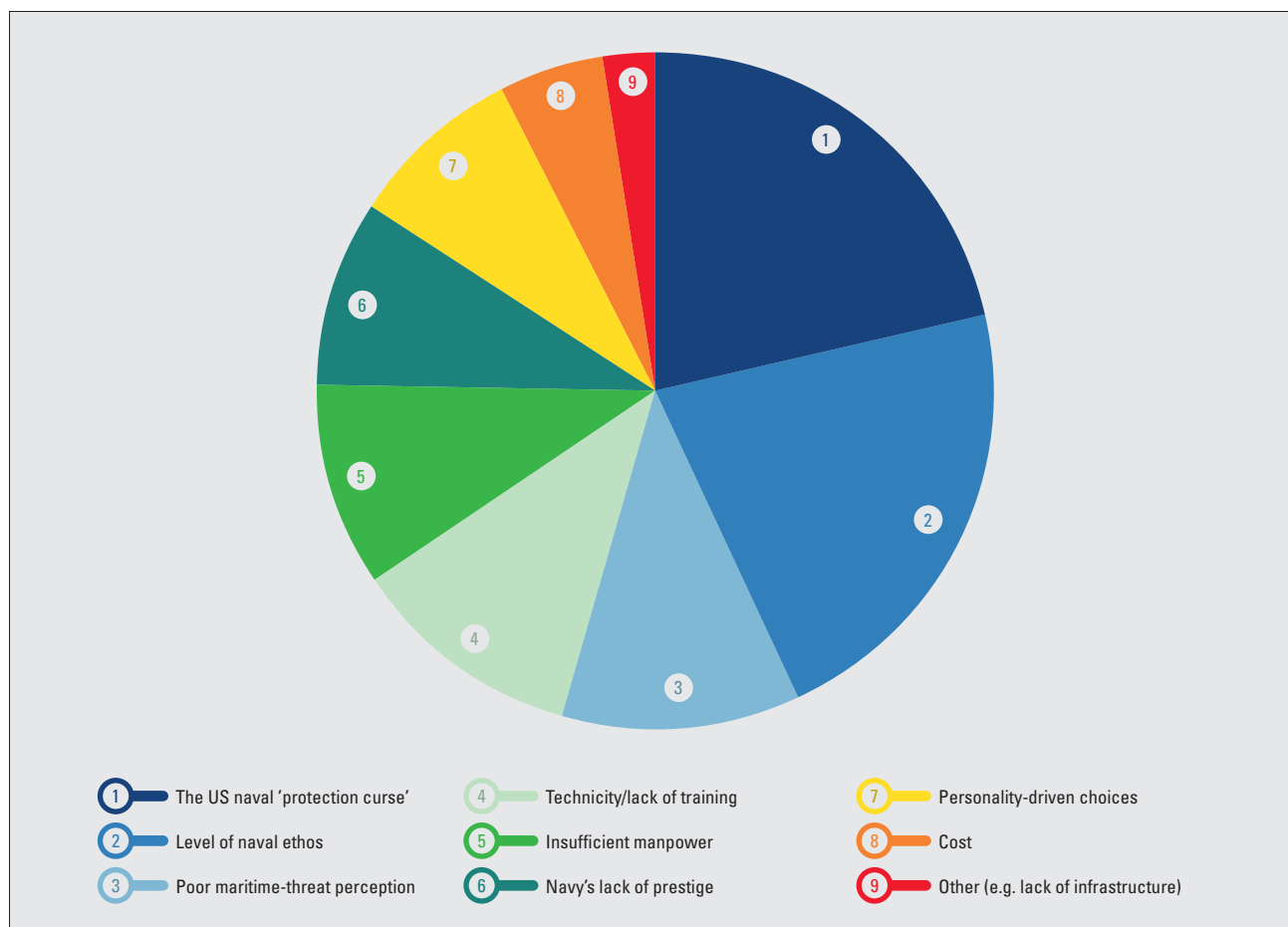
There is a general agreement among analysts that Gulf states' navies have long remained in a nascent stage of development compared to their more mature land and air forces. Given these countries' high dependence on seaborne trade, a Western scholar wonders from where this 'curious Gulf aversion to developing international class naval forces' originates.³ Several factors have played a key role in impeding the modernisation of Gulf-state naval forces (see Figure 1.1). A survey conducted for this research paper ranked the nine principal impediments going back four decades. The section below examines the top three impediments as identified by naval practitioners and defence experts.

One significant finding is that these impediments do not necessarily fall into a clear causal chain. Has a low level of naval ethos engendered little interest in naval capabilities among Gulf leaders, or is it the other way around? These questions are difficult to answer as they depend largely on individual cases and *sui generis* circumstances. That said, ranking these factors helps to improve understanding of the main reasons for the low priority given to naval forces historically.

The US naval 'protection curse'

In 1978, the Carter administration began to describe the Gulf region as 'vital' for the US. Then US national security adviser Zbigniew Brzezinski spoke of an 'arc

Figure 1.1: **Impediments to the development of Gulf-state navies**



Source: IISS (survey with 22 participants)

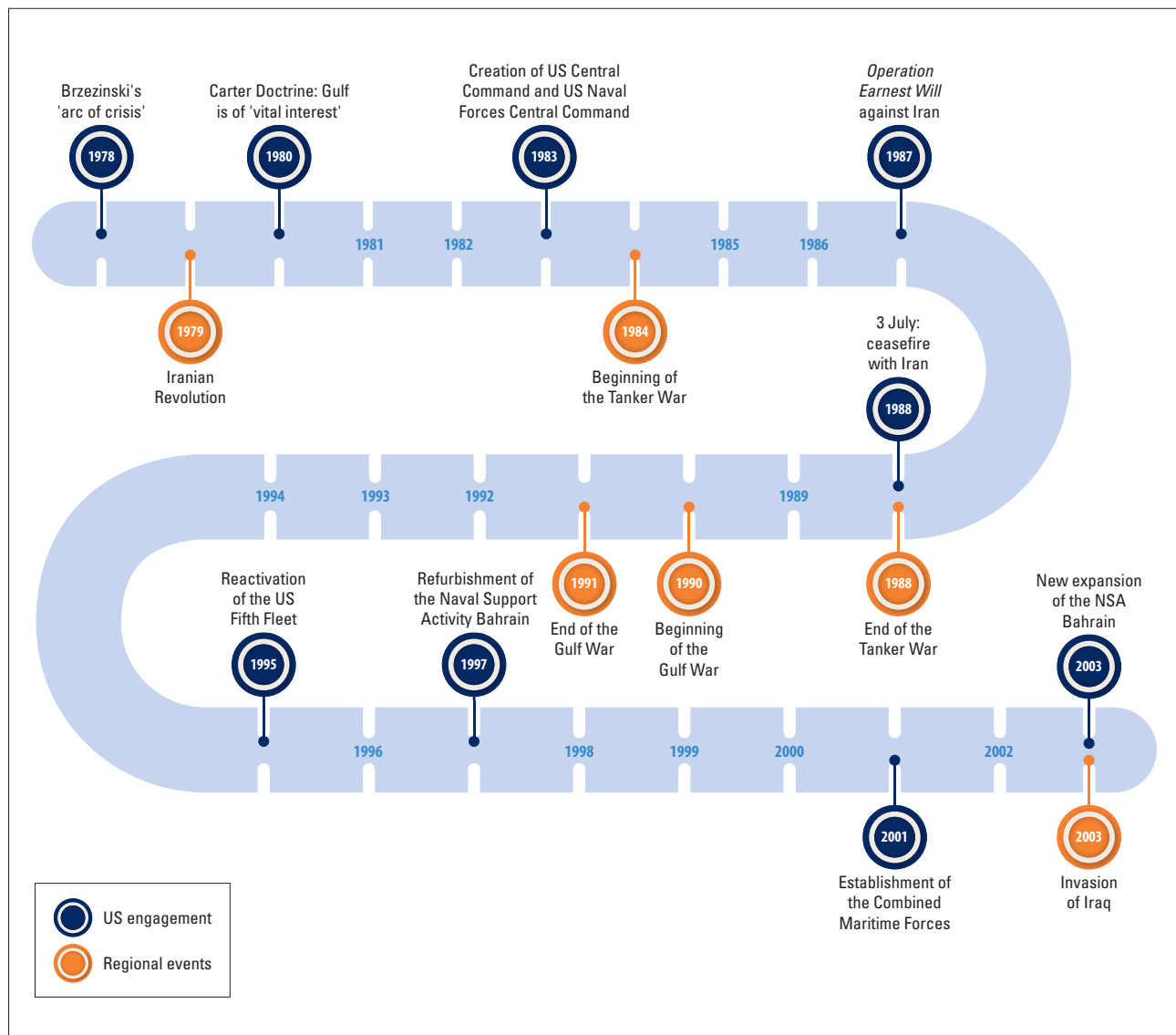
of crisis' that encompassed countries 'along the shores of the Indian Ocean ... in a region of vital importance to us'.⁴ In light of the critical US energy supplies derived from the Gulf, Brzezinski feared a possible disruption of the sea lanes, chiefly by the Soviet Union. His statement served as the premise for the 1980 Carter Doctrine, the concluding sentence of which Brzezinski wrote himself:

An attempt by any outside force to gain control of the Persian Gulf region will be regarded as an assault on the vital interests of the United States of America, and such an assault will be repelled by any means necessary, including military force.⁵

In the wake of the 1979 Iranian Revolution and the Soviet invasion of Afghanistan in the same year, this more formal statement of the 'vital' nature of the region, voiced by president Carter in his State of the Union Address in January 1980, laid the groundwork for considerable US military involvement in the Gulf (see Figure 1.2). Immediately afterwards, Carter created the Rapid Deployment Joint Task Force, which in 1983 became US Central Command (CENTCOM) – with US Naval Forces Central Command (NAVCENT) as its naval component.

A major operational outcome was the dispatch of numerous ships to the region. In February 1980, the US sent to the Arabian Sea a US Marine Corps amphibious assault force and a helicopter assault ship, together

Figure 1.2: **US engagement in the Gulf region's waters, 1978–2003**



Source: IISS

with five other vessels.⁶ These forces joined two carrier task forces already deployed in the region. In July 1987, against the backdrop of the Iran–Iraq War, NAVCENT launched its first significant operation, *Operation Earnest Will*. US ships were deployed to escort Kuwaiti oil tankers transiting the Gulf and to defend against Iranian attacks targeting oil facilities and tankers. The US later entered a direct conflict with Iran and destroyed a large part of the Iranian navy in 1988.⁷ In the 1990s, the US policy of ‘dual containment’ of Iraq and Iran relied on even greater naval efforts.⁸

From 1980, the American naval presence in the region grew with each passing year. Eventually, this led to the reactivation of the US Fifth Fleet in 1995, following a 48-year hiatus.⁹ However, such a strong permanent presence in the region, which became the backbone of the US security guarantee, turned over time into what scholar David B. Roberts called the ‘protection curse’. For Roberts, the US military commitment removed the ‘pressures on [Gulf states] leaders to make difficult choices’ in the forging of their armed forces.¹⁰ Although this protection curse was multi-domain, the considerable US naval presence in the region – and Gulf states’ assumption that the US would ultimately ride to the rescue – help explain why forging capable navies was not a pressing need for Gulf leaders. Hence, they paid limited attention to naval capabilities until the 2010s, with a few exceptions (such as the Sawari I and II programmes, through which France sold four and three frigates to Saudi Arabia respectively, and provided training for Saudi sailors).¹¹ Overall, as Figure 1.1 illustrates, survey participants viewed the US presence as the most important factor that has impeded the development of Gulf-state navies.

Poor maritime threat perception

The protection curse resulted in a perception among the Gulf states that direct maritime threats were unlikely to reach them. This assessment did not stimulate investment in the naval domain, whether at national or Gulf Cooperation Council (GCC) level.

Until the early 2010s, the Gulf states’ threat perceptions were mostly dominated by concerns about extremist activity from Sunni and Shia groups, and land invasion – given the lasting shock of the 1990 Iraqi

invasion of Kuwait and land incursion into Saudi Arabia in 1991. The regional policy of ‘detente, dialogue and confidence-building’ associated with Iranian presidents Akbar Hashemi Rafsanjani (1989–97) and Mohammad Khatami (1997–05) played a role in this regard.¹² After 2005, the advancement of Iran’s ballistic-missile capabilities under president Mahmoud Ahmadinejad (2005–13) heightened Gulf concerns about the Iranian threat – although not yet from a seaborne perspective.¹³ The maritime domain became a more serious cause for concern with the rise of piracy between 2006 and 2010 in the Gulf of Aden, off the coast of Somalia and around the Strait of Hormuz.¹⁴ Nonetheless, all these developments did not lead to a significant elevation of naval threats on the GCC risk register.

This absence of a perceived maritime threat affected military readiness: except for a few drills, no naval operations were conducted by a Gulf state until the Saudi-led coalition’s intervention in Yemen in 2015 following the overthrow of its internationally recognised government in 2014.¹⁵

Meanwhile, a GCC collective-security architecture never took off. Each GCC country has prioritised individual over collective interest and pursued bilateral cooperation with major security providers, notably the US. This was especially true before the 2010s.¹⁶ Gulf states’ fear for their sovereignty, fuelled by Iraq’s invasion of Kuwait, made the US central to their security, while they reasoned that defence integration would inevitably benefit the strongest country in the region. Moreover, the US presence was preferable to the uncertain prospects of collective security. Notably, the only significant effort to create GCC security mechanisms did not include a naval component: Peninsula Shield, launched in 1984, is a standing coalition land force that today consists of a joint command able to conduct military operations if one of the six countries is attacked. A GCC naval initiative (Task Force 81), which aims to patrol international waters from the Gulf to the Gulf of Aden, came into force only in 2015 and does not yet appear to be active.

Level of naval ethos

Of the nine factors impeding Gulf states’ naval modernisation, the level of naval ethos is likely the most difficult to grasp and the factor that most permeates

the eight others. Indeed, it is as much influenced by personality-driven choices or the perception of maritime threat as it itself influences these factors. Whether regarded as a cause or consequence, naval ethos was considered by the interviewees to be tied with the US military presence as the most significant impediment to naval development. To clarify this matter further, Gulf-state-navies experts, both practitioners and observers, took part in a survey to rank the current six GCC navies and Iran's in terms of their naval ethos. This ranking is analysed in Chapter Three.

Naval ethos has three components: a crew spirit with a will to sail for days; an enduring determination to build, operate and maintain ships; and high technical skills. That is why acquisitions alone do not say much about performance at sea. Developing capable naval forces requires a long-term and determined intent, notably because it is costly and requires qualifications.

Without a track record of military operations, measuring military effectiveness is difficult. In the past four decades, the only prominent naval operation in the Gulf took place off the coast of Yemen, and began in 2015. Despite their lack of experience, the UAE and Saudi Arabia have conducted significant operations at sea during the conflict against Ansarullah (often referred to as the Houthis). By setting up naval monitoring and interception around Yemen or, in the case of the UAE, by conducting unprecedented amphibious operations in Aden in summer 2015, both countries improved their naval ethos.¹⁷ The level of readiness of ships increased while sailors, especially Saudi ones, have stayed for longer periods at sea.

A historical lens shows that, with the exception of Oman, Gulf states' levels of naval ethos have been low. People in Bahrain, Qatar and the UAE had a proud sailing tradition as pearl fishers and traders, which was lost during the twentieth century as they transitioned to new economic models. Furthermore, naval forces have traditionally been associated with conquest, as illustrated by the histories of European navies. With a semi-enclosed sea and no tradition of

colonising, Gulf states did not build navies to conquer other countries. Likewise, dominated by hinterland families from Najd, Saudi Arabia has long paid limited attention to its shores and surrounding waters, including the Red Sea.¹⁸ This context partly explains why there are few naval colleges in the Gulf (and, where there are, why they have been founded only recently). For instance, Qatar's Mohammed Bin Ghanem Al Ghanem Maritime Academy's first academic year was 2019. And there is no such academy in Kuwait or Bahrain. Saudi Arabia's King Fahd Naval College is older, having been established in 1986.

The low level of naval ethos is further demonstrated by the key role that foreigners have played in supporting Gulf states' naval development. To operate their ships, Gulf-state navies have relied on training provided primarily by the US and the United Kingdom. The Royal Navy partnered with Oman as early as 1798 with the signature of the Treaty of Friendship. It also signed its first agreement with Bahrain in 1835 to combat piracy. In 1972, the US Navy helped the Royal Saudi Naval Forces match the Imperial Iranian Navy.¹⁹ Other European countries, through military sales, and India, through training, have played important roles in operational leadership.²⁰ The Tanker War of the 1980s was a turning point in the internationalisation of Gulf waters. Alongside the US deployments, France, Italy, the UK and the USSR sent warships to the region; the role played by these non-Gulf navies in regional naval operations delayed the development of indigenous capabilities.²¹ Nonetheless, as discussed in Chapter Three, Oman has been an exception. Between the eighteenth and nineteenth centuries, the Omani Empire had a vast maritime trade influence stretching from the Gulf down to East Africa. Having partnered with the Royal Navy, Oman and its long coastline helped to enable British naval dominance in the region amidst European rivalry there in the nineteenth century.²² Muscat therefore developed a genuine naval tradition, its capabilities having been catalysed by its imperial history and the British experience.

Chapter Two: What Prompted Naval Modernisation?

In the past decade, Gulf leaders started to doubt US security commitments, including the Carter Doctrine. With the main disincentive to naval modernisation being the US presence, Washington's ongoing attempt to recalibrate its posture in the region, as illustrated by its 2022 National Defense Strategy, has prompted new defence thinking in Gulf states. In parallel, the Iranian threat at sea has grown; Tehran has expanded its capabilities and been increasingly assertive in claiming its naval ambition, pushing most Gulf states into a fast-paced naval rearmament.

Perceptions of an ailing Carter Doctrine

Since the early 2010s, US foreign policy has led the Gulf states to expect a sooner-or-later American withdrawal from the region. Because of the shale boom, total petroleum (including crude oil) imported by the US fell from nearly 13.47 million barrels per day in 2007 to 8.47m in 2021.²³ In November 2019, the US even became a net oil exporter. Besides this economic reality, in the late 2000s and early 2010s, statements by senior US officials hinted at the then-looming US posture recalibration in the region. In a 2009 address in Tokyo, then US president Barack Obama presented himself as 'America's first Pacific president', while a 2011 *Foreign Policy* article by then-secretary of state Hillary Clinton stated that 'the future of politics will be decided in Asia'.²⁴ These two landmark comments set the stage for the US pivot to Asia. At the same time, Gulf states' views on regional security issues began to diverge from those of the US. While the latter wished to maintain the status quo without necessarily addressing sub-state threats, most Gulf Cooperation Council (GCC) states were markedly concerned with their domestic security, not least the rise of the Muslim Brotherhood and unrest in Bahrain.²⁵ All these elements led the Gulf states to expect an impending US strategic retrenchment.

In 2019, a significant blow was administered to the Carter Doctrine, although it remains operative as the US presence in the region remains significant.²⁶ In September that year, uninhabited aerial vehicles (UAVs) and cruise

missiles struck Saudi Arabia's Abqaiq and Khurais oil facilities. Claimed by the Iranian-backed Houthis but conducted by Iran from Iranian territory, the assault was the most destructive of its kind in the history of the Iran-Saudi Arabia relationship.²⁷ No US retaliation came. In choosing not to intervene, the Trump administration created a precedent that undermined an implicit US security guarantee to Saudi Arabia. This episode was all the more detrimental because it took place during a Republican administration, which are traditionally seen as more inclined to support the United States' allies in the Gulf.

The apparent drop in US strike-group deployments across the region was also perceived as a sign of a faltering security relationship. Between 2010 and 2013, the US maintained two aircraft carriers in the Gulf, a policy known as the '2.0 carrier presence'.²⁸ As of early 2023, there is no such ship in the region. USS *Nimitz* was the last carrier deployed in the region – in January 2021 – in the wake of the first anniversary of the US strike that killed Qasem Soleimani, the commander of the elite Quds Force of Iran's Islamic Revolutionary Guards Corps (IRGC), and Abu Mahdi al-Muhandis, the deputy head of Iraq's Hashd al-Shaabi militia.²⁹ However, this carrier gap, besides being occasional, is justified by the fact that an aircraft carrier brings reassurance and not capability. Hence, it is better and safer to deploy them outside the Gulf. In and of itself, this carrier gap does not indicate a withdrawal of US naval assets from the region.³⁰ However, from a Gulf perspective, US policy towards the region – and notably Iran – is sometimes perceived as inconsistent. Whether Republican or Democratic, trust in the US government has weakened, and the GCC states have felt compelled to develop autonomous capabilities.

Iranian threats at sea

A range of incidents

Sea incidents in and around the Gulf have increased in number and sophistication in recent years.

Aside from piracy around the Horn of Africa, the only serious maritime threat to the Gulf states comes from Iran and its allied militia, the Houthis. As Table 2.1 illustrates, violent incidents span a broad spectrum of operations involving naval and limpet mines, drone attacks, ship seizures and arms trafficking. Since 2019, the trend has accelerated. In May of that year, four tankers were sabotaged off the UAE coast near Fujairah, one of the world's largest bunkering hubs. Moreover, the US seized three times more illegal arms in 2021 than in 2020.³¹ The last counter-smuggling operation took place in January 2023; the US Navy intercepted a small fishing vessel, headed for Yemen from Iran, transporting 2,000 AK-47 assault rifles.³²

Iran adopted an offensive naval strategy in 2016,³³ driven by an intent to expand its maritime reach and thereby lessen the threat to its borders.³⁴ In 2016, Iranian Supreme Leader Sayyid Ali Khamenei firmly proclaimed Iranian naval ambitions, stating that 'the navy is at the forefront of the defence of the country'.³⁵ As this strategy appears to rest on plausible deniability – that is, operating in the grey zone below the threshold of conventional warfare to avoid being held accountable – incidents are generally not claimed. For instance, Iran denied its responsibility for the attack on the tanker *Mercer Street* in July 2021, which killed two people. Iran has claimed responsibility for operations on rare

occasions, however. In May 2022, for example, the IRGC Navy (IRGCN) seized two Greek-flagged oil tankers, likely as a retaliation for the role Greece played in the US seizure, one month earlier, of a Russian tanker carrying Iranian oil in the Aegean Sea. The IRGCN released them in September 2022.

Improved capabilities

To execute its offensive naval strategy, Iran is enhancing its capabilities. Having reportedly raised the IRGCN's and the Islamic Republic of Iran Navy's (IRIN's) budgets by 58% and 53% respectively in 2021, it is on the way to expanding its already leading position at sea, aside from non-Gulf-State navies.³⁶ Indeed, Iran has the largest inventory of patrol and coastal combatants and fast attack crafts in the region, with the aim of prioritising mass mobility and speed to conduct asymmetric attacks. In the Gulf, Iran has the most submarine and mine warfare capabilities. These are useful for attacking tankers or 'conduct[ing] swarming tactics to isolate and overwhelm targets'.³⁷

In terms of acquisitions, Iran's naval rearmament is fast paced.³⁸ Its acquisitions of Chinese assets, such as the *Houdong*-class and C 14-class missile boats, indicate that Iran has been upgrading its ability to launch missiles from mobile maritime platforms.³⁹ More recently, the country stepped up its capacity to build offensive ships

Table 2.1: Selection of recent Iranian-linked maritime incidents

Incident	Location	Date
Several drones damage three oil tankers and a bunkering ship; Israel, Saudi Arabia, the UK and the US blame Iran, but Tehran denies responsibility	Off the coast of Fujairah, UAE	May 19
A drone attacks the oil tanker <i>Mercer Street</i> . The Romanian captain and a British bodyguard are killed; Israel, Romania, the UK and the US blame Iran, but Tehran denies responsibility	Gulf of Oman	Jul 21
The US Navy intercepts a fishing vessel and seizes 1,400 Russian rifles and 226,600 rounds of ammunition	Arabian Sea	Dec 21
The IRGCN seizes two Greek-flagged oil tankers	Gulf waters	May 22
The IRGCN seizes one US Saildrone Explorer USV, releasing it four hours later	Gulf waters	Aug 22
The IRIN seizes two US Saildrone Explorers USVs, releasing them the next day	Red Sea	Sep 22
An Iranian <i>Shahed</i> 136 drone hits the oil tanker <i>Pacific Zircon</i>	Arabian Sea	Nov 22
The US Fifth Fleet intercepts a fishing vessel and seizes 70 tonnes of ammonium perchlorate and 100 tonnes of urea fertiliser	Gulf of Oman - transiting from Iran to Yemen	Nov 22
The US Fifth Fleet intercepts a fishing trawler and seizes 50 tonnes of ammunition	Gulf of Oman	Dec 22
The US Fifth Fleet intercepts a fishing vessel transporting 2,100 AK-47 assault rifles	Gulf of Oman - transiting from Iran to Yemen	Jan 23
The French Navy intercepts a fishing vessel with 3,000 assault rifles, more than 20 anti-tank guided missiles and half a million rounds of ammunition	Gulf of Oman - transiting from Iran to Yemen	Jan 23

Source: IISS

domestically, as shown by the September 2022 launch of the stealth catamaran *Shahid Soleimani*. Interestingly, this reportedly seaworthy warship, equipped with vertical-launch short-range and medium-range air-defence systems, was made to navigate in blue waters.⁴⁰

Blue-water ambitions

Rooted in its doctrine of ‘forward defence’, expeditionary capabilities have become an essential objective for Iran. An IRGCN commander defined this doctrine as follows:

We will not let the enemy reach the Iranian territory. We must target the enemy’s interests in areas far from our borders, on land and at sea.⁴¹

Traditionally, the IRIN has been at the forefront of Iran’s maritime expansion. Its strategy mainly rests on converting tankers into military vessels, such as the 110,000-tonne *Makran*, which now plays the role of a base ship. These oil-tankers-turned-warships can increasingly go far and stay for long periods at sea. *Makran*, for example, reached the Baltic Sea in 2021 to participate in a naval parade with Russia.⁴² It also reached Indonesia in 2022.⁴³ Besides converted ships, the IRIN has also started to send frigates to remote waters, such as *Sahand*, which escorted the *Makran* in the Baltic Sea. In December 2022, the destroyer *Jamaran* was seen sailing in the South Pacific Ocean close to French Polynesia.⁴⁴

High-seas ambitions are no longer the exclusive domain of the IRIN, however. In August 2022, the commander of the IRGC, Major-General Hossein Salami, stated that the IRGCN had been instructed to bolster its presence in blue waters.⁴⁵ Besides the newly commissioned catamaran *Shahid Soleimani*, the IRGCN is about to receive a 36,000-tonne former container ship

currently being converted into a support vessel, the *Shahid Mahdavi*. This ship should be able to host helicopters and act as a launch platform for drones.⁴⁶ It will likely be followed in 2023 by a similarly converted ship, the *Shahed Bagheri*.⁴⁷

These developments having been acknowledged, it is important to note that these IRIN and IRGCN capabilities are still at an early stage of development. Moreover, these initiatives are suitable for a broad gunboat-diplomacy strategy – useful for clandestine and grey-zone activities, but should a strong force posture be required in the event of a confrontation at sea, Iran’s real naval capabilities would likely prove insufficient.

The conflict in Yemen

In the wake of the conflict in Yemen, the rise of the Houthi movement, which threatens commercial shipping in the Bab el-Mandeb Strait and vessels of the Saudi-led coalition, served as a catalyst for the modernisation of the Saudi and UAE navies. The main maritime threats facing the coalition have been anti-ship missiles, drone boats (known as water-borne improvised explosive devices, or WBIEDs), and sea mines mostly located in ports along Yemen’s Red Sea coast, such as Mokha and Hudaydah.

The first confirmed attack by an anti-ship missile targeted a civilian ship used by UAE military forces in October 2016.⁴⁸ The first use of a WBIED by the Houthis took place in 2017. Remotely controlled, the drone boat exploded at the stern of the Saudi frigate *Madina* and killed two Saudi sailors.⁴⁹ As for sea mines, an estimated 205 were detected and destroyed between 2015 and 31 October 2021, in the southern Red Sea or drifting off the Saudi coast.⁵⁰ As detailed later, these threats compelled the Royal Saudi Naval Forces and the UAE Navy to adapt and modernise.

The Red Sea

The Red Sea has become an increasingly important waterway over the last decade, owing to its strategic location between two major maritime chokepoints: the Suez Canal and the Bab el-Mandeb Strait. However, this growing importance has also made the region more vulnerable to conflicts and tensions, with its shipping lanes and the surrounding countries' shores facing security risks. In 2018, the then-head of the IRGC's Quds Force Qasem Soleimani even warned that 'the Red Sea [was] no longer safe' for the US.⁵¹

These risks have been further exacerbated by the ongoing conflict in Yemen, prompting US Naval Forces Central Command (NAVCENT) to launch Combined Task Force 153 in 2022, with Egypt assuming command in December of that year. The southern Red Sea is currently the hotspot, with the Houthi threat, Iranian presence, and the Horn of Africa's instability driving Gulf states such as Saudi Arabia and the UAE to expand their activities in the area. Egypt, with its newly built Berenice naval base, also claims a major role in securing the region.⁵²

As a result of these developments, a naval competition has emerged in the area, with Saudi Arabia vying for dominance. Indeed, GCC states have increased significantly their naval presence in the southern Red Sea. The UAE has adopted an ambitious basing strategy and established a military and commercial presence, through its navy and DP World, in several locations – Perim island, Berbera and Aden, to name a few.⁵³ Riyadh is recapitalising its Western Fleet through two programmes with Navantia, *Avante*-class corvettes and multi-mission surface combatant (MMSC) frigates, reflecting its ambitions on the western coast, including the need to protect the NEOM project. Qatar also has clear interests in the

region. Before the fall of Sudanese president Omar al-Bashir in 2019, Doha was in a good position to secure a concession to operate Sudan's seaport.⁵⁴

In addition to the Gulf states, China, Russia, Israel and Türkiye have stepped up their presence in the Red Sea. China has built a port in Port Sudan and established a military base in Djibouti, while Russia has expressed interest in setting up a naval base in Sudan. Israel is expanding its maritime footprint in the region. For instance, in December 2020, the Israeli Navy sent a submarine into the Red Sea, likely headed towards the Arabian Sea.⁵⁵ Finally, Türkiye attempted to lease the Sudanese island of Suakin before the fall of Bashir.⁵⁶

While each state with a naval presence in the region desires to safeguard the free flow of commerce, securing a favourable balance of power remains their underlying goal.⁵⁷ For example, Abu Dhabi does not consult Riyadh as it pursues maritime expansion in the southern Red Sea.⁵⁸ The prevalence of power politics was evident in the creation of the Red Sea Council in 2020, which aimed to secure the waterways from Suez to Bab el-Mandeb but has been plagued by tensions over its leadership and composition. Ultimately, Riyadh took control of the council, pushing for a security focus, while the UAE, which does not border the Red Sea, was not eligible to be part of this initiative.⁵⁹

The Red Sea is a critical backdrop for a potential restructuring of the regional balance of power. Developments in this strategic sea could prompt states to ramp up their acquisition and basing policies to expand their maritime footprint in the region, further fuelling the ongoing naval rearmament in the area. The presence of external powers, such as China and the US, as well as the expansion of Israel's maritime interests in the Red Sea, will undoubtedly play a role in shaping the region's future.

Chapter Three: Growing Naval Ambitions

To hedge against the perception of an unreliable US security umbrella (and also in response to US demands for greater Gulf Cooperation Council – GCC – ownership of regional security), the Gulf states have placed greater emphasis on burden-sharing and cooperation. To mitigate their dependence on the US Fifth Fleet, they have also started to diversify their foreign relations and invested significantly in naval capabilities over the past decade. As a result, ‘sea blindness’ is now giving way to greater, if uneven, maritime ambitions in regional leaders’ minds.

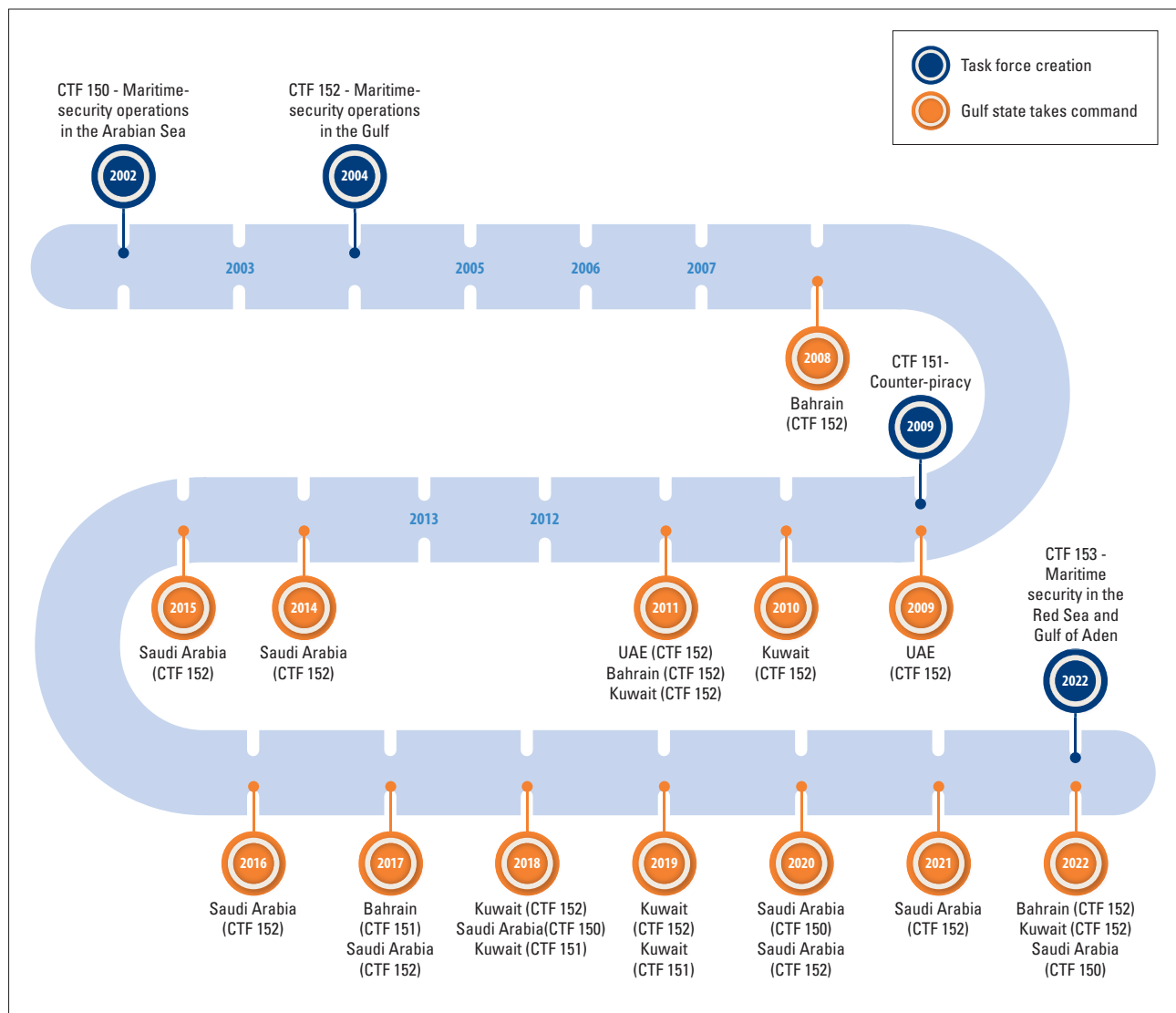
That said, the Gulf states’ naval-modernisation strategies must still overcome shortcomings, not least in addressing threats adequately.

Cooperation first

Burden-sharing with the US

The combination of Iran-related threats and the perception of American retrenchment has led the Gulf states to take on a larger share of maritime-security

Figure 3.1: **Command history of the regional Combined Task Forces (CTFs)**



Source: IISS

responsibilities in their regional waters, and thereby modernise their navies. Initially, this new approach to burden-sharing has taken the form of heightened and widened cooperation with the US. Gulf states' involvement in the Combined Maritime Forces (CMF) – the US-led multinational maritime partnership – is an in-progress example of such activity (see Figure 3.1). The first Combined Task Force (CTF), CTF 150, was created in 2002 to conduct maritime security operations (MSO) outside the Gulf. Saudi Arabia was the first GCC country to take command of CTF 150, 18 years after its creation. More generally, as Figure 3.1 illustrates, Kuwait, Bahrain, Saudi Arabia and the UAE have each taken command of a CTF over the years, thus developing their capacities in MSO, operational leadership and interoperability. In this regard, a Kuwaiti officer who commanded CTF 152 stated: 'When I assumed command of the task force, my goal was to continue building the naval capabilities of GCC countries... This included increasing maritime efficiency and nurturing a spirit of mutual cooperation.'⁶⁰

In terms of results, the last command of CTF 150 by a Gulf state led to the seizure of illegal drugs worth an estimated US\$186 million.⁶¹ Such a command, which was held by the Royal Saudi Naval Forces (RSNF) for six months until it was transferred to the UK in January 2023, has become a more frequent occurrence for most Gulf states and demonstrates their willingness to take on maritime responsibilities.

In the same vein, naval drills involving the US Navy and at least one Gulf state are becoming more frequent and proving equally important for enhancing MSO efficiency. In 2015, 20 such exercises were conducted in the region. In 2021, there were 33, while in 2022 more than 70 occurred, including in the Red Sea.⁶² Overall, these cooperative efforts made by the Gulf states serve to strengthen naval ethos and credibility.

Intra-GCC naval cooperation remains limited

GCC states have expressed their intent to increase their role at sea as a collective force. To that end, they have taken some steps to mitigate their dependence on the US Fifth Fleet and address their own competing policy goals. Indeed, enhancing maritime-domain awareness and joint naval operations across the Gulf requires,

notably, sharing intelligence; the GCC naval forces commanders' annual meetings, the last of which took place in Qatar in July 2022, are meant to facilitate this. One interviewee, on condition of anonymity, argued that this institution was improving its effectiveness, with talks increasingly translating into actions, particularly in terms of data sharing.

In the wake of this growing intent to boost the integration of Gulf-state navies, the Bahrain-based Unified Maritime Operations Centre (UMOC), which falls under the GCC Unified Military Command, was inaugurated in 2016.⁶³ Equipped with an encrypted network that links it to the GCC's secure military communications network, it mostly serves to coordinate the different national operations centres.

Another significant GCC initiative was the launch, also in 2016, of Task Force 81. Designed to serve as the spearhead of local maritime-security architecture, today it is more an object of pride and communication than a genuinely operational force.⁶⁴ In that respect, it is telling that few involved observers had heard much about it.

Overall, intra-GCC naval integration remains limited. Increased data sharing, through the UMOC or the US-led CMF task forces, is likely to be the most significant cooperative development. In terms of operations, Task Force 81 is certainly less consequential than the few GCC joint naval exercises that have taken place over the last ten years. For instance, a successful drill (*Union 17*) was held for ten days in March 2015 with the six Gulf-state navies. The results were positive, stepping up combat readiness, preparedness and integration between the GCC navies.⁶⁵ Bilateral cooperation is also taking place: a drill between the Saudi and Bahraini navies (*Bridge 23*) was conducted in December 2022 with the goals of raising integration and readiness.⁶⁶ Such cooperation can mitigate the maritime tensions that have hindered naval relations between Qatar and Bahrain. Between 2010 and 2020, an estimated 650 boats and 2,153 Bahrainis, mostly fishermen, were detained by Qatar.⁶⁷ In 2020, three Qatari coastguard boats intercepted two ships from the Bahraini coastguard as they were returning to port after an exercise.⁶⁸ As relations between Qatar and other GCC countries have improved since 2021, it is likely that the number of intra-GCC naval exercises, of the ambition and size of *Union 17*, will increase.

Seeking other partners

In a bid to mitigate their dependence on the US – and largely with Washington's encouragement – the Gulf states have deepened relations with non-US partners.

Oman is the most pragmatic GCC state with respect to its maritime security. It maintains deep relations with the US and is an active member of the CMF. In addition, Oman has a long-standing relationship with the UK. The Royal Navy was recently granted access to the port of Duqm, which is large enough to host its nuclear submarines and *Queen Elizabeth*-class aircraft carriers. Meanwhile, Muscat remains eager to maintain its neutrality, spurred in part by its strategic position bordering the Strait of Hormuz. It is thus the only GCC country to hold joint naval drills with Iran. In 2022, two drills were conducted between Oman and Iran together with China and Russia.⁶⁹

More generally, recent years have seen a growing diversification in Gulf states' bilateral and multilateral partnerships at sea. The UAE has been a prominent player in this domain, increasing the number of drills held with Egypt ("*Khalifa II*", "*Khalifa III*"...)⁷⁰; conducting its first bilateral exercise with India in 2018⁷¹; and, in 2020, taking part for the first time in *Medusa 11*, a significant naval drill in the Eastern Mediterranean with Greece as its main participant.⁷² Qatar is taking a similar path, holding many of its drills with Pakistan or India. Pakistan and Türkiye even sent corvettes – PNS *Tabuk* and TCG *Burgazada*, respectively – to support Qatar in 2022, as part of *Operation World Cup Shield*.

The major leap forward in recent years, in terms of regional maritime partnerships, was likely the November 2021 exercise in the Red Sea involving Bahrain, Israel, the UAE and the US. In the wake of the US-brokered Abraham Accords, the two Gulf states participated in the first naval drill ever publicly held with Israel in the region by a GCC state. This five-day exercise was clearly aimed at countering Iranian threats.⁷³ Though it was under US auspices, the drill could be seen as a landmark in the long journey towards more autonomous Gulf-state navies, a less US-dependent security architecture at sea and an increasingly significant Israeli role in regional waters.

Growing naval capabilities

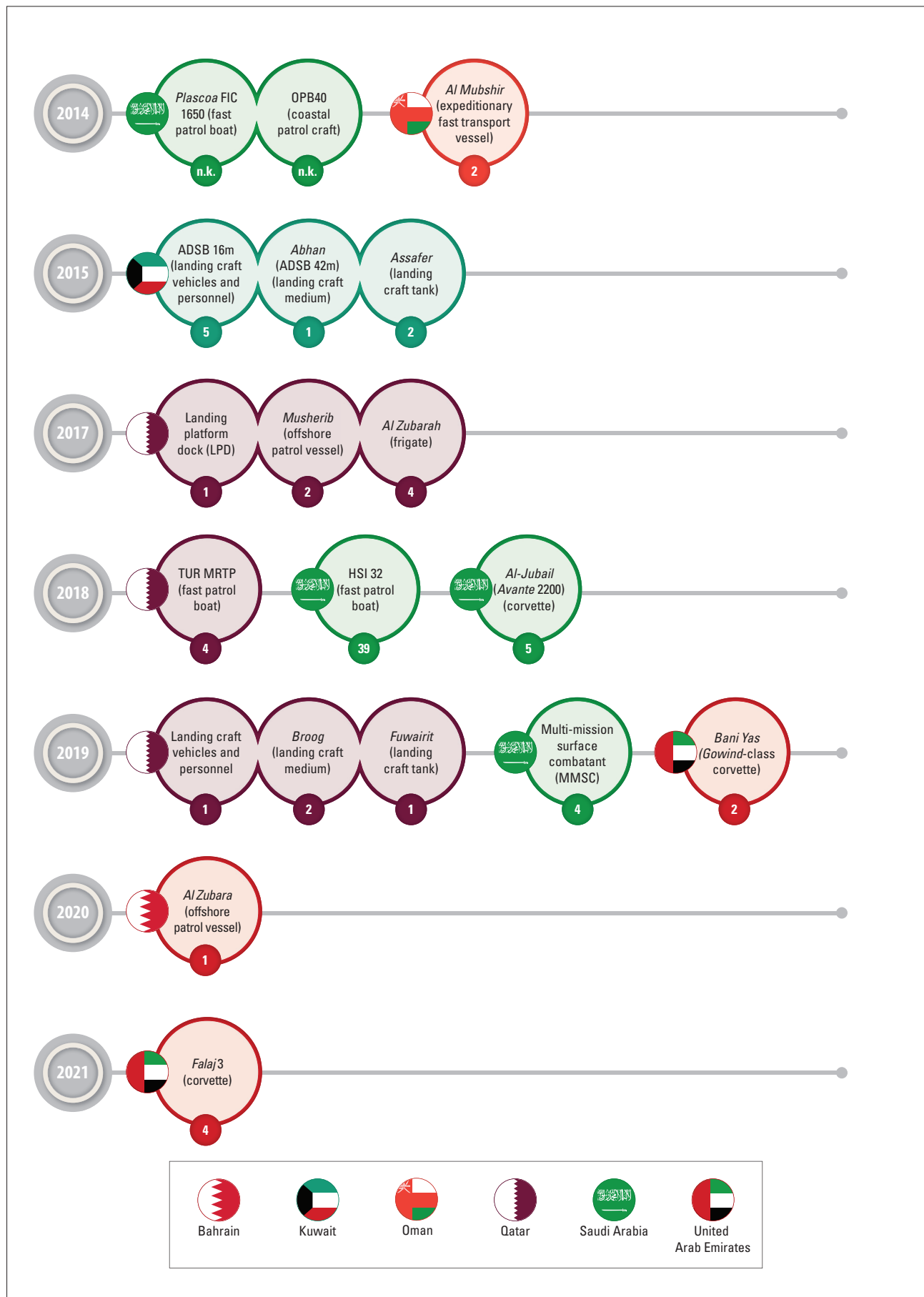
A significant increase in naval assets, albeit unevenly leveraged

Gulf states' heightened focus on naval forces has translated into growing investment in naval assets, including ships, bases and indigenous industrial capacities. From 2014–22, the number of Gulf-state vessels grew from 512 to 621.⁷⁴ Saudi Arabia and Qatar acquired the most vessels. Kuwait acquired the least, with just eight new landing crafts (see Figure 3.2), followed by Bahrain with 16 new patrol ships. Eager to expand their maritime reach, Gulf states' naval-modernisation efforts have mostly focused on recapitalising surface combatant fleets with new multi-role frigates and corvettes. Yet the question remains as to whether the region can effectively absorb this level of investment.

Saudi Arabia's acquisition programme has been the most ambitious (Table 3.1 highlights the range of principal surface combatants currently operated by the RSNF). In November 2022, Riyadh decided to procure five multi-mission combat ships – intended for its Western Fleet – from the Spanish company Navantia. In line with Saudi Vision 2030, these will be built locally, thereby allowing significant technology transfer.⁷⁵ In addition, five *Avante*-class corvettes are already under construction by Navantia through a joint venture with Saudi Arabian Military Industries (SAMI).⁷⁶ This project will develop the first Saudi combat system, *Hazem*, which eventually will be integrated into the *Avante*-class corvettes. In late 2022, the Western Fleet also started to receive some of its new fast patrol boats (FPB) built by the French shipbuilder Couach. The Eastern Fleet, for its part, will be recapitalised with four multi-mission surface combatants (MMSC) procured under the US Foreign Military Sales programme, with Lockheed Martin as the prime contractor. Known as the 'Tuwaiq Project', these ships will become the backbone of the fleet operating in the Gulf waters.

The UAE spent slightly less than Saudi Arabia in recent years and adopted a more pragmatic approach to acquisitions. Its lower spending, compared to its larger neighbour, can be explained partly by the UAE's more mature indigenous capabilities. For example, Abu Dhabi Ship Building (ADSB) was the leading shipyard in a joint

Figure 3.2: **Selection of ordered naval assets, 2014–21**



Source: IISS Military Balance+.

Table 3.1: **Gulf-state principal surface combatants**

	Ship class	Equipment	Number
Bahrain	<i>Sabha</i> (Ex-US <i>Oliver Hazard Perry</i> (FFG 7))	Frigate with surface-to-surface missiles, a hangar and surface-to-air missiles	1
Oman	<i>Al-Shamikh (Khareef)</i> (UK)	Corvette with surface-to-surface missiles, a hangar and surface-to-air missiles	3
Qatar	<i>Al Zubarah</i>	Frigate with surface-to-surface missiles, a hangar and surface-to-air missiles	1
Saudi Arabia	<i>Al Riyadh</i> (FRA <i>La Fayette</i> mod)	Frigate with surface-to-surface missiles, a hangar and surface-to-air missiles	3
Saudi Arabia	<i>Al-Jubail</i> (<i>Avante</i> 2200)	Frigate with surface-to-surface missiles, a hangar and surface-to-air missiles	2
Saudi Arabia	<i>Madina</i> (FRA F-2000)	Frigate with surface-to-surface missiles, a hangar and surface-to-air missiles	3

Source: IISS Military Balance+.

venture with Constructions Mécaniques de Normandie (CMN) to build six *Baynunah*-class corvettes. The corvettes were ‘fully assembled, commissioned and delivered at ADSB’.⁷⁷ The UAE’s pragmatism is evidenced by its efforts to acquire two *Gowind*-class corvettes – despite the fact that frigates are more prestigious and seaworthy in blue waters than corvettes – because they are easier to operate and have sufficient capabilities to conduct anti-surface, subsurface and surveillance operations. Moreover, the UAE embarked on a power-projection phase by deploying assets in strategically located Yemini islands, such as Socotra (off the Somali coast) and Perim (in the Bab el-Mandeb Strait), and ports such as Assab (Eritrea) and Berbera (Somaliland).⁷⁸ During the Saudi-led intervention in Yemen, for example, the UAE had the largest sealift capability of the Gulf states thanks to its permanent presence in Assab. At least two UAE corvettes and eight amphibious vessels were deployed there in 2018, notably to supply the coalition’s forces.⁷⁹ After the attacks (attributed to Iran) against oil tankers off Fujairah’s coast in 2019, however, the UAE decided to slow its regional power projection, notably to de-escalate the tensions. It then decided to recalibrate its power-projection strategy away from a military-centric approach.⁸⁰ In 2019, the UAE abandoned a project to build a naval base in Berbera, developing the civilian port and airport instead. In 2021, it withdrew its military assets from the port of Assab as it pulled back after the conflict in Yemen.

Qatari Emiri Navy (QEN) commander Major-General Abdullah bin Hassan al-Sulaiti recently stated that the QEN has entered the ‘fourth stage’ of its modernisation with a ‘quantum leap’.⁸¹ The cornerstone of this step up is a US\$5.65 billion contract signed with Fincantieri in 2016, a major deal that will see the delivery of four corvettes, two offshore patrol vessels (OPVs) and a landing

platform dock (LPD). Here again, in a bid to increase Qatar’s expeditionary capabilities, these surface combatants constitute the principal effort of modernisation. As claimed by Sulaiti, the main ambition remains to go beyond the Gulf.⁸² Being the only Gulf state with such a significant amphibious vessel (the LPD), Qatar will be able to prop up its anti-tactical-ballistic-missile capabilities with an L-band radar. In conjunction with a corvette, the QEN will then have a long-range picture that will enhance its early-warning capabilities.⁸³ Qatar also built a new naval base in Umm Al Houl in 2020 to host the crux of its fleet. In addition, it expanded its General Directorate of Coasts and Borders Security (GDCBS) in 2019 when it opened another naval base in Al Daayen to secure Qatar’s territorial waters.⁸⁴ The GDCBS subsequently received a new fleet of 48 metre-long patrol ships. However, as seen later, Doha may face difficulties in effectively absorbing all these investments given its lack of manpower.

The Royal Navy of Oman was the first Gulf state to complete its fleet recapitalisation. In the early 2010s, it received three *Khareef*-class corvettes from BAE Systems and four *Al Ofouq*-class patrol ships from ST Engineering. Muscat has also been taking advantage of its geographic location. Through a joint venture between the UK-based company Babcock and the Oman Drydock Company, the naval-logistics facilities of Duqm port have been developed to provide servicing to international navies – including fuelling, replenishment and crew rest. Owing to its neutral posture, Oman is also establishing a joint maritime-security centre with Iran and Pakistan, to be built in the Iranian port of Chabahar, which will focus on the Indian Ocean. The centre will aim to counter smuggling and piracy.⁸⁵

Bahrain and Kuwait, with limited resources and a significant US military presence in their territories, have not significantly modernised their navies or coastguards. The most recent recapitalisation was undertaken by the Royal Bahrain Naval Force with the commissioning of the *Al Zubara* in 2021 (a former UK patrol ship) and five patrol coastal ships in 2022 (previously operated by the US Navy).⁸⁶ Compared to their neighbours, Bahraini and Kuwaiti naval forces are considered coastal. Nonetheless, interviews conducted for this research paper indicate their shared ambition to increase expeditionary capabilities. Therefore, whether it is to deter threats or to match as closely as possible other Gulf-state naval capabilities (see Figure 3.3), Bahrain and Kuwait could modernise their fleet in the coming years.

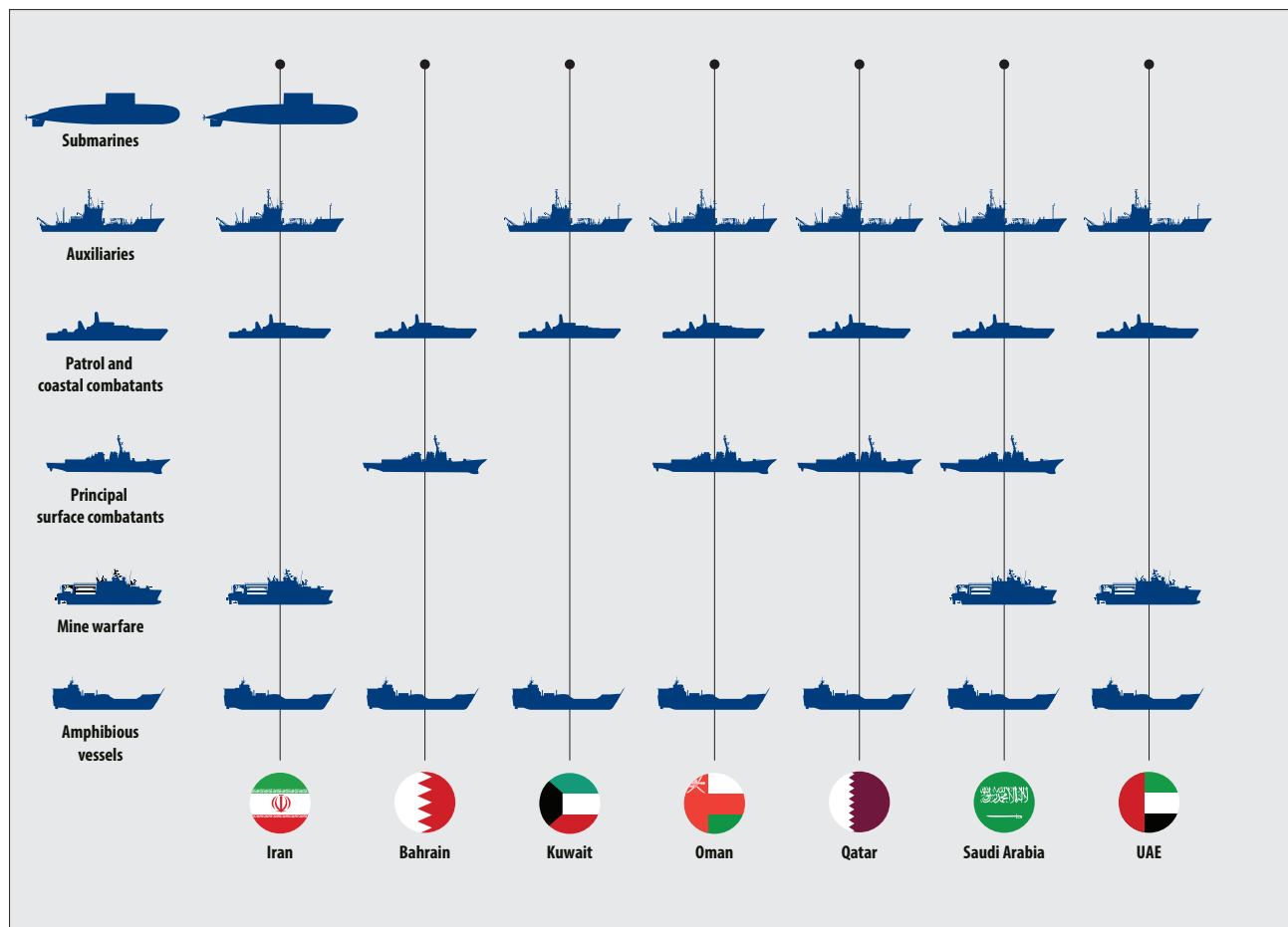
Yemeni waters and naval ethos

Over the course of the conflict in Yemen, the UAE and Saudi Arabia saw not just an increase in naval assets but

also improvements in their naval capabilities. For the first time in their history, they played a leading role in MSO. From self-directed demining operations in the southern Red Sea to enforcing maritime restrictions aimed at depriving the Houthis of valuable resources, the range of actions led by the Gulf navies was extensive and unprecedented. Importantly, as the threats increased, UAE and Saudi sailors demonstrated a willingness to learn from the US and play their part as soon as possible.⁸⁷

Two dimensions of operational progress can be identified. Firstly, the Gulf navies showed adaptability in countering asymmetric warfare, notably through a collective approach. The Houthi strategy has relied on using small boats, small arms – such as rocket-propelled grenades (RPGs) – sea mines and water-borne improvised explosive devices (WBIEDs) to conduct attacks against civilian ships or impede maritime traffic. To tackle these threats, the Gulf navies learned to launch rapid responses and undermine the Houthis' anti-access/area-denial actions.⁸⁸ With a lasting presence at sea, for

Figure 3.3: **Type of naval assets in possession as of mid-2023**



Source: IISS Military Balance+.

instance, the Saudi *Madina*-class frigates and the UAE *Baynunah*-class corvettes played a key role in raising maritime-domain awareness to prevent asymmetric attacks and manage the blockade.⁸⁹ The blockade also served as a battleground-test for another Gulf navy, the Royal Bahrain Naval Force, which deployed its frigate *Sabha* in November 2015.⁹⁰

Secondly, both the UAE and Saudi navies demonstrated progress in tactical and operational thinking. *Operation Red Thunder*, led by UAE forces in 2018, is a good example of emulative adaptation and warfare thinking. This military success consisted of an amphibious assault on a Houthi command-and-control centre in the region of Faza, in Yemen's Hudaydah governorate.⁹¹ Interestingly, the UAE likely learned from its first amphibious assault conducted three years earlier in Aden, which impressed US officials, who praised the successful execution of such a complicated operation.⁹²

The experience of the conflict in Yemen also encouraged Gulf countries to develop a more comprehensive approach to ensuring that their naval forces are consistently operational. For instance, the RSNF now places much emphasis of raising its level of readiness, as repeated officials' declarations indicate.⁹³ In this respect, training and maintenance, repair and overhaul (MRO) seem more prominent in leaders' minds and are deemed crucial to meeting their military goals. In July 2022, the crew of the RSNF corvette *Al-Jubail* concluded a training programme in Spain after spending 46 weeks in the UK.⁹⁴ Among others, shooting exercises were conducted to improve air-defence capabilities. In the UAE, the Naval Doctrine and Combat Training Centre (NDCTC) is about to be established in Taweelah with the ambition to be 'one of the world's most advanced naval training facilities'.⁹⁵ Recently, the RSNF and SAMI have secured partnerships with Lockheed Martin to ensure that their MMSC frigates 'are ready and available throughout their lifecycle'.⁹⁶

Overall, the actions undertaken by the Saudi and UAE navies over the course of the conflict in Yemen – including monitoring and interdicting sailing into Houthi-controlled areas of Yemen, and conducting self-directed operations – coupled with the various attacks they and commercial ships had to overcome, 'refocused the minds' of Gulf leaders as to the importance of their

naval forces.⁹⁷ Therefore, in terms of training, materiel, facilities, and more broadly in terms of naval ethos, major Gulf countries have made progress.

Lasting shortcomings

Although the RSNF and the UAE Navy are the most operationally tested of the Gulf-state naval forces, the interviews conducted for this research paper tell a slightly different story. Asked to rank the naval ethos of the GCC countries and Iran – without distinguishing between the coastguard and the navy or between the Islamic Revolutionary Guards Corps Navy and the Islamic Republic of Iran Navy – the 14 interviewees made a clear distinction between the acquisition of assets and their operations. The two countries that acquired the most assets in recent years, Qatar and Saudi Arabia, appear to be considered the least skilled

Figure 3.4: **Naval ethos of Gulf states and Iran, 2022**



Source: IISS (survey with 14 participants)

at sea. Figure 3.4 illustrates that Oman and Iran are seen as having the highest levels of naval ethos, whereas Saudi Arabia came in fifth place.

The main reason behind this result is that such a ranking likely reflects the persistent nature of historical perceptions. Oman's long-standing naval relationship with the Royal Navy certainly boosted its current rank; likewise, the RSNF's historically low level of readiness and traditional reluctance to spend several days at sea are still vivid in interviewees' minds, despite recent progress.⁹⁸ Iran's ranking can be explained by its longer, stronger and permanent presence at sea, even if this is

dominated by small speedboats instead of frigates (for Iran's total number of patrol and coastal combatants, see Figure 3.5).

Tackling threats

It is worth noting that because of Iran's offensive strategy, the conflict in Yemen and attacks on infrastructure, the Gulf states have started to take maritime threats more seriously. According to recent IISS research, the UAE and Bahrain even viewed threats to maritime security as a major concern.⁹⁹ However, the pattern of acquisitions and the absence of formalised

Figure 3.5: **Patrol and coastal combatants (in-service), 2022**



Source: IISS, *The Military Balance 2022*

military doctrine in Gulf states indicate the persistence of a non-threat-driven approach to defence modernisation. To counter Iranian or Houthi malign behaviour, Gulf navies still lack essential capabilities, not least air-defence systems at sea. The Houthis recently exhibited anti-ship ballistic missiles capable of reaching vessels at ranges beyond 200 nautical miles into the Gulf of Aden, carrying warheads between 100 kilograms and 400 kg.¹⁰⁰ Likewise, the Iranian navy is pursuing the development of a wide range of guided missiles. The Gulf navies, however, have not significantly invested in enhancing naval-air joint warfare, intelligence, surveillance and reconnaissance (ISR) capabilities and early-warning sensors to counter these airborne threats.¹⁰¹ Although this enhancement is underway,¹⁰² efforts seem disparate and not necessarily coherent. This lack of coherence is reflected in another example. Among gulf navies, Minesweeper is the only category of vessel that has decreased since 2014 – because the Houthis sank one UAE unit and four Saudi units were decommissioned.¹⁰³ Yet drifting or planted mines still threaten commercial and military ships in the southern Red Sea.

This non-threat-driven approach is also conspicuous in how the Gulf states' ongoing naval modernisation mismatches their blue-water ambitions. Indeed, there are currently no significant orders for logistics vessels. Yet such ships are necessary to amplify frigates' and corvettes' potential on the high seas. A military doctrine with clearly identified threats would allow less vertical and more tailor-made decisions concerning procurement policies, organisation, training and personnel needs.

Crewing ships

As briefly noted earlier, manpower remains a substantial limitation (see Figures 3.6 and 3.7). Indeed, there is a mismatch between GCC states' high ambitions – supported by their large-ship procurements – and the reality of the difficulties they face in trying to crew their modernised fleets. Some 660 additional sailors are required to crew the four corvettes, the two OPV and the LPD being delivered to Qatar by Fincantieri. This number is more than 25% of the 2,500 sailors that comprise the Qatari Emiri Navy today.¹⁰⁴

One way to mitigate the manpower issue is to increase the number of foreigners onboard ships and ashore, and accept foreigners in officer positions. However, this approach is not without its risks and may create dependence on other countries, such as Pakistan. As for very senior positions, former US admirals work as advisers to the UAE Navy and the RSNF.¹⁰⁵

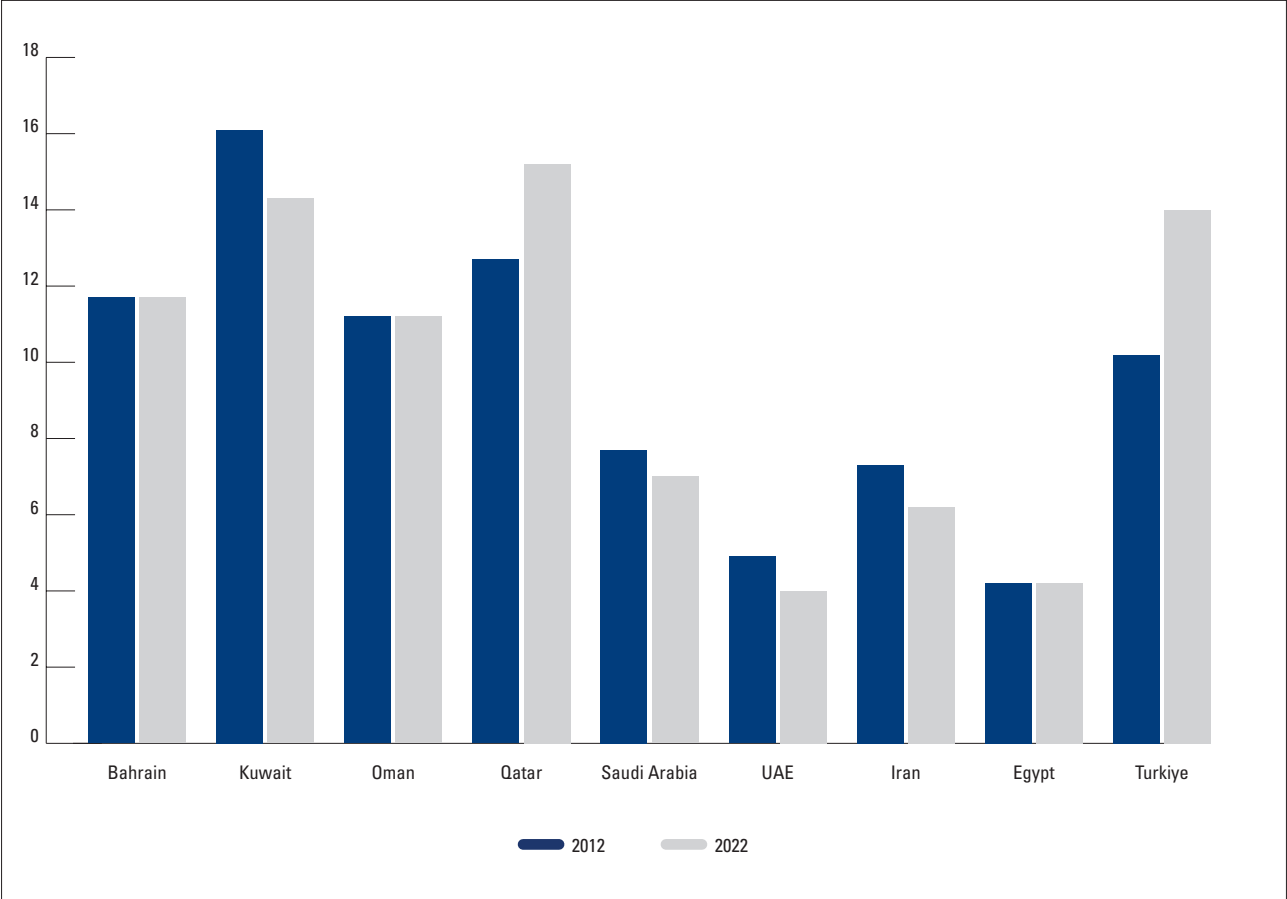
Another way to rely on foreign human resources is to operate commercial vessels with civilian crews to conduct discrete missions, such as transporting weapons and military vehicles.¹⁰⁶ However, these ships can undertake only a limited range of missions and are far more vulnerable than their military counterparts. In January 2022 for example, the Houthis seized the unarmed UAE-flagged cargo ship *Rwabee* in the Red Sea. It was transporting military vehicles and rigid inflatable boats and travelling from Socotra to the Saudi port of Jizan.¹⁰⁷ The Houthis retained the crew, mainly Indian sailors, for five months before an intercession by Oman helped to secure their release.

Task force 59: the advent of unmanned capabilities

Against the backdrop of the manpower issue, the Gulf states have shown great interest in the US Naval Forces Central Command (NAVCENT)-launched Task Force (TF) 59. Established in September 2021, this initiative aims to raise maritime-domain awareness in the Gulf and Red Sea regions while using uninhabited surface vessels (USVs) and uninhabited underwater vehicles (UUVs). Equipped with sensors and linked to operational centres, these uninhabited systems aim to expand sailors' eyes at sea to collect a wide range of data, which is subsequently processed by artificial-intelligence models ashore. Analysts can then detect unusual behaviours. Yet despite its high potential, the task force is still at an early stage of development.

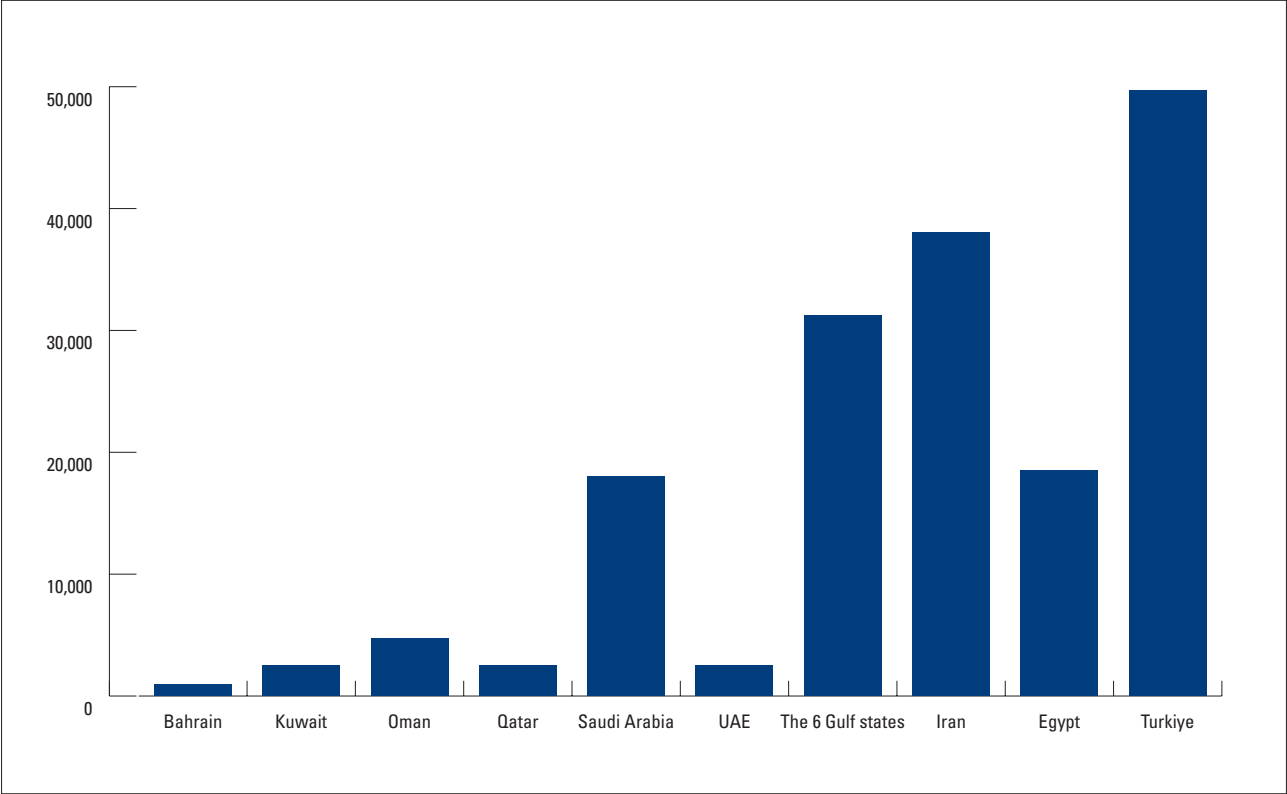
Bahrain and Kuwait, with 960 and 2,500 sailors respectively, have supported this US initiative since its creation. In January 2023, the commander of the US Fifth Fleet stated that both 'have publicly acquired [US-made unmanned] systems, and all the other countries in the region are in some form of their own acquisition'.¹⁰⁸ In October 2022, as part of CTF 152, Bahrain even led a drill in the Arabian Sea featuring

Figure 3.6: **Naval personnel as % of total military personnel, 2012 and 2022**



Sources: IISS, *The Military Balance* (2012 and 2022)

Figure 3.7: **Naval personnel (active military), 2022**



Source: IISS *The Military Balance* 2022

the use of uninhabited systems, notably US Saildrone USVs.¹⁰⁹ Above all, it is worth noting that the largest naval exercise in the Middle East, dubbed IMX 2022, was also the world's largest deployment of uninhabited systems – involving 80 such systems, as well as 50 ships and 9,000 personnel.¹¹⁰

These new capabilities, which are seen as a means to thwart Iran's and the Houthis' grey-zone warfare strategies, are welcomed by the Gulf states. Once fully operational, the task force should bolster deterrence by detection in the region, which consists of putting the spotlight on potential malign behaviours

to prevent or undermine them (because if an actor knows they are being watched, they are less likely to act). As discussed later, this type of deterrence is appropriate to better tackle regional threats, and TF 59 is its spearhead.¹¹¹ That said, uninhabited systems will not be a substitute for crewed vessels. They might mitigate slightly the personnel pressures of some GCC countries, but only for a small range of missions – mostly patrol and surveillance.¹¹² The scope of naval operations in the Gulf and its surrounding seas will continue to require frigates or patrol vessels with humans onboard.

Conclusion: Strategic Implications

Evolving landscape

Gulf states' naval-modernisation efforts have been encouraged by an evolving regional maritime-security architecture that is likely to have three key characteristics in the near future. Firstly, it is likely to remain dependent on the US – but less so. As this research paper has demonstrated, Gulf states have taken steps to develop their naval capabilities – through leadership of task forces, the conduct of standalone operations (Yemen), or the build-up of indigenous industries with strong offset policies (Abu Dhabi Ship Building, Saudi Arabian Military Industries) – the result being that they are becoming slightly more autonomous. This autonomy is burgeoning in the context of a 'more independent and assertive mindset [that] is emerging in Gulf capitals'.¹¹³ However, the US will remain the X factor. US Naval Forces Central Command oversees, if not runs, all the main naval coalitions, such as the International Maritime Security Construct (IMSC), the Combined Maritime Forces (CMF) and Task Force (TF) 59, and there is no reason to believe that this arrangement will change. Despite its policy recalibration, the US has the most significant force posture in the region.

Secondly, the regional maritime-security architecture will become increasingly cooperative, as the US urges its partners to share the burden as part of its 'integrated deterrence' strategy. Reflecting this trend, the aforementioned naval coalitions are expanding. The CMF welcomed Egypt as its 34th member in 2021 and the Egyptian Navy took command of the newly created Combined Task Force 153 a year later. In 2022, the IMSC welcomed its tenth and 11th members, Seychelles and Latvia, and the Royal Saudi Navy Western Fleet (Saudi Arabia has been a member since 2019 through its Eastern Fleet) in order to improve coordination to stop state-sponsored malign activity. As for the more recently established TF 59, in 2023 France, Germany and the Netherlands sent military attachés to join its headquarters in Bahrain.¹¹⁴

Thirdly, the role of Israel is likely to grow, although it remains to be seen how this will affect the regional

balance of power. Since the Abraham Accords were signed in 2020 (by Bahrain, Israel and the UAE), the country has ramped up its maritime presence in the Red Sea. Israel has participated in various exercises, such as IMX 2022, which also involved Bahrain, Oman, Saudi Arabia and the UAE. Overall, Israel is expanding its maritime footprint in the region. For example, the Israeli Navy and the UAE are partnering to establish a base on Socotra and are reportedly building a military base on the nearby Abdul Kori island.¹¹⁵ In the same vein, in December 2020, the Israeli Navy sent a submarine into the region, probably headed towards the Arabian Sea, if not the Gulf itself.¹¹⁶ The assessed goal was to deter Tehran from retaliating following the assassination of Iranian nuclear scientist Mohsen Fakhrizadeh. Such a deployment could have been repeated since then. Moreover, Israel's maritime expansion is further supported by the fact that the Israeli Navy is next on the list to join the CMF.¹¹⁷ It is unclear whether such an integration of Israel into the regional-security architecture could spur an escalation with Iran, or whether a US–Israeli–Arab containment might succeed in deterring it. In any case, the Gulf states – in association with Israel, the US and other partners – are giving greater priority to the maritime domain, which they see as central to their security and prosperity.

Deterrence by denial and by detection

A significant aspiration of Gulf state's naval-modernisation efforts is the evolution of deterrence. To mitigate Iranian threats, the US and its regional allies have relied on deterrence by denial and by punishment. The latter, in the aftermath of an ailing Carter Doctrine epitomised by Washington's restraint following the 2019 attacks against Saudi Arabian oil facilities, has likely faltered but remains the backbone of the US-dominated regional security architecture. Deterrence by denial however, which aims to discourage an aggressor from attacking by reducing the likelihood that it will hit its target, might be enhanced under certain conditions.

In the maritime domain, doing so requires bolstering early-warning capabilities, air-defence systems at sea, and asymmetric warfare. In this regard, progress is being made via Qatar's landing platform dock, Saudi Arabia's US-made multi-mission surface frigates, and the UAE's *Gowind*-class corvettes. One way to increase the credibility of these capabilities is to synchronise air-defence systems across the region with naval patrols, and to clarify the rules of engagement and assistance between partners.¹¹⁸ More integrated navies, based on the logic of comparative advantage, could complement each other to fill the regional capacity gap. However, it would require overcoming the limiting factor of politics: Gulf Cooperation Council states should improve trust among themselves and strengthen their alignment on regional issues, not least Iran. This would eventually lead to a more effective deterrence by denial.

Deterrence by detection could be substantially boosted.¹¹⁹ As much of the Iranian strategy relies on plausible

deniability, the ability to keep the spotlight on Iran and its proxies' malign behaviour at sea would seriously undermine its threatening agenda. Uncrewed capabilities will be at the forefront of efforts to achieve this capability. For example, when Iran seized the Task Force 59 Saildrone USV in August 2022, US Central Command's chief technology officer admitted that 'we knew that we were making [the Iranians] nervous'.¹²⁰ With more sensors at sea, round-the-clock situational awareness will become feasible. And the Gulf states have all expressed an interest in developing these capabilities.

Finally, should the US and Israel choose to intervene against Iran to neutralise its nuclear facilities, the Gulf states would either wish to play a role or distance themselves from such an assault. In any case, they would need to hedge against the spillover effects that such an intervention could generate. In the maritime domain, this would require reinforcing their defence postures with an emphasis both on deterrence by denial and by detection.

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- ⁵ Office of the Historian, US Department of State, '138. Address by President Carter on the State of the Union Before a Joint Session of Congress', 23 January 1980, <https://history.state.gov/historicaldocuments/frus1977-80v01/d138>.
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