

GREAT-POWER RIVALRY, MIDDLE-POWER STRATEGIES, AND NON-STATE ACTORS: RESHAPING THE ECONOMIC, ENERGY, AND SECURITY ORDER IN THE MIDDLE EAST

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ABSTRACT

The Middle East is experiencing a profound transformation in its regional and international order as intensifying great-power rivalry intersects with the growing strategic autonomy of regional middle powers and the expanding influence of non-state actors. The United States remains the most significant external military power in the region, yet China's economic and diplomatic presence has expanded considerably, while Russia continues to employ military, diplomatic, and energy instruments to preserve its regional influence. Simultaneously, Saudi Arabia, the United Arab Emirates (UAE), Qatar, Türkiye, Iran, and Israel have increasingly adopted strategies of diversification, hedging, and selective alignment rather than relying exclusively upon a single external patron. The emergence and consolidation of non-state actors, including Hezbollah, Hamas, the Houthis, and Iran-aligned armed groups in Iraq and Syria, further complicate the conventional state-centric understanding of regional order. This article examines how these interacting forces are reshaping the economic, energy, and security architecture of the Middle East. Employing a qualitative and interpretive research design based on peer-reviewed scholarship, academic books, official documents, and reports from international institutions, the study analyzes the interaction between great-power competition, middle-power strategies, and non-state agency. It argues that the emerging Middle Eastern order should not be understood simply as a transition from American hegemony to Chinese dominance. Rather, the region is developing a condition of negotiated multipolarity in which great powers compete for influence, middle powers exploit that competition to expand strategic autonomy, and non-state actors exploit political fragmentation to acquire asymmetric leverage. This transformation is particularly evident in energy markets, infrastructure, maritime trade, investment, defense procurement, and regional diplomacy. The study further demonstrates that economic diversification and the global energy transition have not eliminated the geopolitical importance of the Middle East but have instead expanded the range of strategic resources and vulnerabilities. The article concludes that the future regional order will be determined less by the dominance of a single external power than by the interaction among competing great powers, increasingly autonomous middle powers, and non-state actors operating across interconnected economic, energy, political, and security networks.

Keywords: Middle East, great-power rivalry, middle powers, strategic hedging, non-state actors, China, United States, Russia, energy security, regional order, geopolitical economy

Introduction

The Middle East has historically occupied a distinctive position in international politics because of its geographical location, energy resources, maritime chokepoints, political conflicts, and importance to the strategic interests of external powers. The region connects Europe, Asia, and Africa and contains several of the world's most consequential energy-producing states and transportation corridors. The Persian Gulf, Strait of Hormuz, Bab el-Mandeb, Red Sea, and Suez Canal constitute strategic spaces through which energy resources and commercial goods move between major global markets. These geographical characteristics have made the Middle East an arena in which local, regional, and

international political forces repeatedly intersect. Yet the contemporary regional order is considerably more complex than the structures that characterized the Cold War or the period of relatively unchallenged American predominance following the collapse of the Soviet Union.

Throughout much of the twentieth century, the political order of the Middle East was profoundly influenced by external great powers. British influence was particularly important during the first half of the century, while the United States and Soviet Union subsequently became central competitors during the Cold War. Following the Soviet collapse, the United States emerged as the dominant external power, supported by military bases, alliances, arms relationships, diplomatic influence, and control over important elements of the international financial system. The 1991 Gulf War reinforced the perception of American predominance, while the 2003 invasion of Iraq demonstrated the extraordinary capacity of Washington to exercise military power in the region. Nevertheless, the subsequent difficulties associated with the Iraq War, the Arab uprisings, the Syrian conflict, the rise of Iran's regional networks, and the increasing economic presence of China have progressively complicated the assumption that the Middle East remains an essentially American strategic sphere (Fawcett, 2019; Gause, 2010; Halliday, 2005).

The transformation has accelerated during the twenty-first century. China has become increasingly important as an energy consumer, trading partner, investor, infrastructure provider, and diplomatic actor. Russia has reasserted itself through military intervention, particularly in Syria, and has used energy diplomacy, arms sales, and diplomatic engagement to preserve its regional influence. At the same time, regional powers have demonstrated a growing willingness to pursue autonomous foreign policies that do not necessarily correspond to the preferences of Washington, Beijing, or Moscow. The result is not simply a struggle between great powers for regional dominance. Instead, the Middle East is increasingly characterized by multiple overlapping relationships in which regional states cooperate with competing external powers simultaneously.

This development is especially evident in the behavior of the Gulf states. Saudi Arabia, the United Arab Emirates, and Qatar have maintained important security and political relationships with the United States while simultaneously deepening their economic and diplomatic relations with China. Their strategies demonstrate that economic and security alignment need not occur with the same external actor. A state may rely upon the United States for advanced military capabilities and deterrence while depending upon China for trade, infrastructure, technology, and energy markets. Such behavior challenges conventional assumptions that states necessarily choose one dominant patron when confronted by great-power rivalry. Instead, regional actors increasingly appear to be adopting forms of strategic hedging through which they preserve relationships with competing powers and thereby expand their room for maneuver (Bakir & Al-Shamari, 2025; Fulton, 2019).

The increasing agency of regional middle powers constitutes one of the most significant features of the emerging order. Middle powers are no longer adequately

understood as states that occupy an intermediate position between great powers and small states. In the contemporary Middle East, some regional states possess sufficient economic resources, military capabilities, diplomatic networks, technological capacity, and geographical significance to shape the behavior of other states. Saudi Arabia and the UAE have demonstrated the ability to combine economic resources with diplomatic activism, military intervention, and international investment. Qatar has used energy resources, diplomatic mediation, and international partnerships to develop influence disproportionate to its territorial size. Türkiye has pursued an increasingly autonomous foreign policy that combines NATO membership with relations with Russia, China, and regional actors. Iran has developed a distinctive form of regional influence through military capabilities, political relationships, and networks of non-state armed organizations.

The emergence of non-state actors represents another major transformation. Hezbollah in Lebanon, Hamas in Gaza, the Houthis in Yemen, and Iran-aligned armed groups operating in Iraq and Syria possess political, military, and organizational capabilities that allow them to influence regional security beyond the boundaries of the conventional state system. Their activities demonstrate that military and political power in the contemporary Middle East is not exclusively concentrated in state institutions. Some of these organizations have developed territorial, political, social, and military structures that make them significant regional actors. Their relationships with states, particularly Iran, further complicate the distinction between domestic, regional, and international politics.

The importance of these developments extends beyond conventional security. The contemporary Middle Eastern order is simultaneously being transformed in economic and energy terms. The region remains central to the global energy system despite the increasing significance of renewable energy and decarbonization. The International Energy Agency (IEA, 2025) reports that the Middle East continues to account for approximately 30% of global oil production and a significant share of global natural-gas production. Regional investment in oil and gas therefore remains substantial even as Gulf states pursue economic diversification and invest in renewable energy, hydrogen, digital technologies, logistics, tourism, and advanced manufacturing. The result is not a straightforward transition from an oil economy to a post-oil economy. Instead, the region is developing a more complex energy structure in which hydrocarbons coexist with emerging energy technologies.

The growing role of China is particularly significant in this transformation. China's demand for Middle Eastern energy has contributed to the deepening of its relations with Gulf producers, while Chinese firms have become increasingly involved in infrastructure, telecommunications, manufacturing, logistics, and renewable-energy projects. The Belt and Road Initiative has further strengthened China's economic position across the region (Chen et al., 2023; Fulton, 2019). China's economic presence, however, does not necessarily mean that Beijing seeks to reproduce the American security architecture. Rather, China has generally emphasized economic interdependence, political stability, and diplomatic engagement. The distinction between economic influence and military dominance is therefore central to understanding China's regional role.

The 2023 Saudi-Iranian diplomatic agreement provided a particularly important illustration of China's expanding regional diplomatic role. Beijing facilitated negotiations between Riyadh and Tehran, contributing to an agreement aimed at restoring diplomatic relations and implementing existing security and economic commitments. The significance of the agreement lies not only in the improvement of Saudi-Iranian relations but also in the fact that China demonstrated its capacity to act as a diplomatic intermediary in a region traditionally associated with American diplomatic influence. Nevertheless, the agreement should not be interpreted as evidence that China has replaced the United States as the principal regional power. Rather, it demonstrates that regional states increasingly possess alternative diplomatic and economic options.

The security environment is similarly fragmented. The United States continues to possess substantial military capabilities and remains central to the security calculations of Israel and several Gulf states. Yet regional governments have increasingly questioned the durability of exclusive dependence upon American security guarantees. The result has been greater diversification of arms suppliers, increased investment in domestic military industries, closer relations with alternative powers, and attempts to reduce regional tensions through diplomacy. These developments indicate that strategic autonomy is becoming an important objective of Middle Eastern foreign policy.

The central research problem addressed by this article emerges from the tension between these developments. The Middle East is becoming more economically interconnected with China and other Asian powers while remaining strategically connected to the United States. Regional middle powers are becoming more autonomous while continuing to depend upon external security relationships. Non-state actors are gaining influence while states remain the principal holders of formal sovereignty. Energy transition is accelerating while hydrocarbons remain economically and geopolitically indispensable. The region is therefore becoming simultaneously more pluralistic, interconnected, and fragmented.

Existing scholarship has produced important analyses of individual elements of this transformation. Studies of international relations in the Middle East have examined American predominance and regional security competition (Buzan & Wæver, 2003; Fawcett, 2019; Gause, 2010). Research on China has examined energy relations, infrastructure, and the Belt and Road Initiative (Fulton, 2019; Hu, 2024). Scholarship on Gulf foreign policy has emphasized strategic hedging and autonomy (Bakir & Al-Shamari, 2025; Krieg, 2017). Research on Iran has explored proxy networks and asymmetric warfare (Celso, 2024; Sobelman, 2025). Yet these strands of literature are often treated as separate analytical problems. There remains comparatively limited integrated analysis of how great-power competition, middle-power strategies, and non-state actors jointly reshape economic, energy, and security structures.

This article addresses that research gap by examining the interaction among these three categories of actors. It argues that the contemporary Middle Eastern order should be conceptualized as a form of negotiated multipolarity. In this emerging order, great powers

create structural pressures and opportunities, middle powers exercise agency by manipulating relationships among competing external actors, and non-state actors exploit political fragmentation to develop asymmetric influence. The article consequently moves beyond a great-power-centric interpretation of regional change and instead conceptualizes the Middle East as a multi-level political system in which power is produced through interactions among states, regional powers, external powers, armed organizations, economic institutions, and transnational networks.

The study is guided by three interrelated research questions. It first asks how great-power rivalry is reshaping the economic, energy, and security order of the Middle East. It then examines how regional middle powers employ hedging, diversification, and strategic autonomy in responding to great-power competition. Finally, it investigates how non-state actors influence the emerging regional order, particularly through asymmetric conflict, maritime insecurity, and disruption of economic and energy networks.

The significance of this research is both theoretical and practical. Theoretically, it connects three areas of scholarship that are often studied separately. Practically, it demonstrates that changes in the Middle East have implications extending beyond regional politics because disruptions to energy supplies, shipping routes, investment networks, and infrastructure can produce consequences for global markets. Understanding the emerging regional order therefore requires an analytical framework capable of connecting international power competition with regional agency and transnational disruption.

Literature Review

The literature on Middle Eastern international relations has traditionally emphasized the interaction between regional politics and external great-power intervention. Buzan and Wæver's (2003) regional security complex theory provides an important foundation for understanding the Middle East as a geographically interconnected security environment in which threats and political relationships are highly concentrated. Rather than viewing regional conflicts independently, the regional-security-complex approach emphasizes patterns of interdependence among neighboring states. This framework remains useful because contemporary Middle Eastern conflicts continue to cross national boundaries and involve regional actors as well as external powers.

Fawcett (2019) similarly demonstrates that international relations in the Middle East cannot be understood exclusively through the actions of external powers. Domestic political structures, nationalism, ideology, regional rivalries, and transnational identities interact with international intervention. Halliday (2005) emphasizes the importance of power, political ideology, and historical structures in shaping the international politics of the Middle East. These approaches provide an important basis for understanding why external great-power influence is filtered through regional political structures rather than automatically determining regional outcomes.

The rise of China has added a new dimension to this literature. China's involvement in the Middle East initially developed primarily through energy relations. As the Chinese

economy expanded, however, the country's dependence upon Middle Eastern energy producers created incentives for Beijing to develop broader political and economic relationships. Fulton (2019) demonstrates that China's relationships with the Gulf monarchies increasingly encompass trade, investment, infrastructure, technology, and political cooperation. China has therefore developed a multidimensional regional presence without reproducing the alliance architecture through which the United States has historically exercised influence.

The Belt and Road Initiative has further strengthened China's position. Chen et al. (2023) demonstrate that Chinese engagement with Middle Eastern states has increased in both scope and intensity under the BRI. Infrastructure, logistics, energy, and trade have become central components of China's regional strategy. Hu (2024) similarly emphasizes the institutional and material dimensions of China's Belt and Road engagement. These developments suggest that economic connectivity is becoming an important source of geopolitical influence.

Nevertheless, China's growing economic role should not automatically be interpreted as a Chinese attempt to replace American military power. Fulton (2021) argues that China's relationship with Iran and the Gulf monarchies reflects a complex balancing of interests. China requires stable access to energy from both sides of the Gulf and therefore has incentives to avoid excessive alignment with one regional actor. Beijing's preference for stability and economic access is fundamentally different from the military alliance structure associated with Washington.

The literature on Gulf states increasingly emphasizes the concept of strategic hedging. Hedging describes a strategy in which states simultaneously maintain relationships with competing powers in order to reduce uncertainty and maximize strategic flexibility. Bakir and Al-Shamari (2025) demonstrate that Qatar, Saudi Arabia, and the UAE have all employed forms of hedging in response to U.S.-China competition, although their strategies differ according to their geopolitical circumstances and domestic priorities. Such behavior suggests that regional states are not simply choosing between great powers. Instead, they seek to benefit from relationships with multiple powers simultaneously.

Krieg (2017) provides an important perspective on the transformation of Gulf security strategies. Gulf states increasingly recognize the risks associated with dependence upon external security providers and therefore seek greater strategic flexibility. The UAE, for example, has pursued a foreign policy that combines military partnerships with the United States, economic engagement with China, commercial relations with Iran, and diplomatic activism across multiple regional arenas.

The literature on middle powers therefore challenges traditional models of alignment. A middle power does not necessarily seek to balance against a great power or bandwagon with it. Instead, it may use the competition between great powers to strengthen its own bargaining position. In the contemporary Middle East, this strategy is particularly important because regional states possess resources that great powers value, including

energy supplies, investment capital, strategic geography, military bases, markets, diplomatic access, and infrastructure.

The literature on Saudi Arabia illustrates the relationship between economic transformation and strategic autonomy. Vision 2030 is frequently discussed as a domestic economic reform program, but its international implications are equally important. Saudi Arabia requires foreign investment, technology, infrastructure, tourism, and global market access to achieve its diversification objectives. This creates incentives for Riyadh to cultivate relationships with multiple international actors. Moreau and Aligishiev (2024) demonstrate the significance of diversification for Saudi Arabia's future economic growth, while contemporary scholarship increasingly interprets Saudi foreign policy through the concept of strategic hedging.

The UAE provides another important case of middle-power agency. Its economic resources, strategic location, infrastructure, sovereign wealth funds, and diplomatic activism have allowed it to develop influence that exceeds what conventional measures of population or territory would predict. The UAE's relationships with China, the United States, Iran, Israel, and other actors demonstrate how a regional middle power can construct multiple overlapping partnerships rather than depend upon a single alliance.

Türkiye represents a different but equally significant form of middle-power behavior. Its NATO membership places it within the Western security system, yet Ankara has simultaneously developed important relationships with Russia, China, Iran, and other regional actors. Turkish policy in Syria, Libya, the Caucasus, and the Eastern Mediterranean demonstrates a willingness to pursue national interests even when these policies create tensions with Western partners. Hedging therefore provides a useful conceptual framework for understanding Türkiye's effort to preserve strategic autonomy in a competitive international environment.

The literature on non-state actors provides a further dimension to the changing regional order. The Middle East has witnessed the emergence of armed organizations that possess military capabilities, territorial influence, political institutions, and transnational networks. Hezbollah represents perhaps the most developed example, combining political participation in Lebanon with an independent military capability and close relations with Iran. Hamas has similarly combined political organization and armed resistance. The Houthis have developed significant military capabilities in Yemen and have demonstrated the capacity to affect international maritime traffic.

Iran's relationships with non-state armed organizations have attracted considerable scholarly attention. Celso (2024) interprets Iran's use of regional armed networks as a form of indirect warfare through which Tehran can project power while limiting the risks of direct military confrontation. This strategy gives Iran strategic depth and enables it to challenge stronger military powers without seeking conventional parity.

However, the concept of "proxy" has limitations. Non-state actors are not necessarily passive instruments of sponsoring states. They possess local interests,

institutional structures, constituencies, and strategic preferences. Sobelman (2025) demonstrates that Iranian-aligned groups have developed their own strategic rules and adaptive capabilities. Their relationships with Iran therefore involve strategic convergence rather than necessarily complete control.

This distinction is important because non-state actors can influence regional order in ways that may not correspond perfectly with the interests of their sponsors. The Houthis' attacks on commercial shipping illustrate the point. By threatening vessels in the Red Sea, the Houthis have generated consequences for global trade, insurance, energy transportation, and supply chains. UNCTAD (2025) has emphasized the vulnerability of maritime trade to geopolitical disruptions, noting that more than 80% of global trade is transported by sea.

The energy literature further demonstrates the continuing importance of the Middle East. The global energy transition has changed the structure of energy geopolitics but has not eliminated the region's strategic importance. The IEA (2025) indicates that the Middle East remains a major producer of oil and gas and continues to attract substantial investment in hydrocarbon production. At the same time, Gulf states are investing heavily in renewable energy and emerging technologies.

Sim and Griffiths (2024) demonstrate that the transition toward renewable energy creates new forms of dependence upon China because China occupies a central position in global renewable-energy supply chains. Gulf states can therefore reduce dependence upon hydrocarbons while simultaneously developing new technological dependencies. This illustrates why energy security must now be conceptualized more broadly to include supply chains, technology, infrastructure, transportation, and electricity systems.

The literature consequently reveals a fragmented but increasingly interconnected regional order. Great powers compete for influence, middle powers seek strategic autonomy, non-state actors exercise asymmetric power, and energy and economic networks transmit the consequences of regional competition across the global system. The principal gap is the lack of an integrated framework connecting these processes.

Method

This study adopts a qualitative, interpretive research design. The methodological approach is appropriate because the research questions concern changing patterns of power, strategic behavior, institutional relationships, and geopolitical transformation rather than variables that can be adequately captured through statistical measurement alone. The study seeks to interpret the strategic behavior of actors within a rapidly changing international environment and to identify relationships among great-power competition, middle-power agency, and non-state influence.

This research is based on secondary data derived from peer-reviewed journal articles, scholarly books, reports published by international organizations, official government documents, and established research institutions. The literature was selected to represent both established theoretical approaches and recent empirical developments. Particular

attention was given to scholarship on regional security complexes, great-power competition, strategic hedging, Gulf foreign policy, China's Middle Eastern strategy, energy geopolitics, and non-state armed organizations.

This analytical framework operates at three interconnected levels. At the systemic level, the study examines competition among the United States, China, and Russia and considers how shifts in global power distribution affect the regional environment. At the regional level, it examines the strategies of Saudi Arabia, the UAE, Qatar, Türkiye, Iran, and Israel as examples of regional states exercising varying degrees of middle-power agency. At the transnational level, it considers the influence of non-state actors and networks, particularly where their actions affect regional security, energy infrastructure, maritime transportation, and international trade.

The study employs comparative interpretation rather than formal statistical comparison. Saudi Arabia and the UAE are examined primarily as examples of Gulf middle-power strategies, while Qatar illustrates the use of energy resources and diplomatic mediation as instruments of influence. Türkiye represents autonomous middle-power behavior outside the Gulf, while Iran provides an important example of regional power projection through a combination of state capabilities and non-state networks. The Red Sea is examined as an empirical space where non-state military activity has generated consequences for international commerce and maritime security.

The central analytical proposition is that regional order emerges through interaction among these different levels. Great powers create structural pressures and opportunities, but regional states interpret and manipulate those opportunities according to their own interests. Non-state actors operate within the resulting environment and can sometimes alter it through asymmetric action. Economic and energy networks then transmit these political and security effects across the regional and global systems.

Results

The analysis indicates that the Middle East is moving toward a competitive and decentralized order rather than a simple transition from American dominance to Chinese dominance. The United States remains the region's most capable external military actor, possessing extensive military infrastructure, intelligence capabilities, advanced weapons systems, and long-standing security partnerships. Nevertheless, American military predominance does not translate into exclusive influence across all dimensions of regional politics.

China has acquired considerable economic and diplomatic influence without establishing a conventional regional alliance system. Its relationships with Gulf states are characterized by trade, energy, infrastructure, investment, technology, and diplomatic engagement. The 2023 Saudi-Iran agreement demonstrated that China's influence has extended into diplomatic mediation, but it did not establish China as a replacement for the United States. Instead, it demonstrated that regional actors can increasingly employ Chinese diplomacy alongside American security relationships.

Russia represents a third form of external involvement. Its economic resources are considerably smaller than those of China, and its ability to project power has been affected by the war in Ukraine. Nevertheless, Russia continues to possess military and diplomatic capabilities that provide strategic influence. Its intervention in Syria demonstrated that Russia could alter regional calculations through relatively concentrated military engagement. Its relationships with Iran and Türkiye, together with its role in energy diplomacy, provide additional avenues for influence.

The evidence therefore indicates that the contemporary regional order is characterized by functional rather than comprehensive multipolarity. The United States remains strongest in military security, China has become increasingly important in economic and technological relations, and Russia retains selective military and diplomatic influence. Regional states move among these relationships according to their own strategic priorities.

The second major finding concerns the behavior of middle powers. Regional states are increasingly using great-power competition to expand strategic autonomy. Rather than choosing exclusive alignment, they are constructing portfolios of relationships. Saudi Arabia may cooperate with Washington on security while simultaneously deepening economic relations with Beijing. The UAE similarly combines Western security relationships with Chinese economic partnerships and extensive regional diplomacy. Qatar uses its energy resources, international partnerships, and diplomatic reputation to maintain relations with multiple competing actors.

This behavior can be understood as strategic hedging. The purpose of hedging is not simply to avoid choosing sides. It is to reduce vulnerability, preserve strategic options, and increase bargaining power. If a state maintains relationships with several external powers, it becomes more difficult for any one power to impose complete dependence. At the same time, competition among external partners can generate better economic, technological, military, and diplomatic opportunities.

Saudi Arabia provides a particularly important illustration of this process. Vision 2030 requires the kingdom to attract international investment and develop new economic sectors. The scale of this transformation requires relationships with numerous global powers. China offers major markets, infrastructure capabilities, manufacturing partnerships, and technological opportunities, while the United States remains important for advanced defense systems and security cooperation. Europe, India, Japan, South Korea, and other actors provide additional economic and technological relationships. Economic diversification therefore reinforces diplomatic diversification.

The third major finding is that the Gulf is becoming a principal geo-economic arena of great-power competition. China is increasingly embedded in Gulf economic networks through energy imports, trade, infrastructure, logistics, and technology. The Belt and Road Initiative has reinforced these relationships by linking Gulf infrastructure to broader Asian-European commercial networks.

This process does not simply produce Chinese dependence upon the Gulf. It creates mutual dependence. China requires stable energy supplies and commercial access, while Gulf states increasingly benefit from Chinese markets, investment, manufacturing, and technology. Such interdependence creates incentives for China to support regional stability while simultaneously giving Gulf states greater leverage in their relations with Beijing.

The fourth finding concerns the transformation of energy security. Hydrocarbons remain fundamental to the regional and global economy, but energy security is becoming increasingly multidimensional. The security of oil and gas supplies remains important, yet so do LNG infrastructure, renewable-energy supply chains, electricity grids, digital infrastructure, maritime transportation, and emerging hydrogen markets.

The Gulf states are consequently pursuing a dual energy strategy. They continue to invest in oil and gas production because hydrocarbons remain highly profitable and globally important, while simultaneously developing renewable energy and other low-carbon technologies. The objective is therefore better understood as energy diversification rather than immediate post-oil transformation.

This process creates new forms of geopolitical dependence. China occupies a dominant position in several renewable-energy supply chains, meaning that Gulf states seeking to diversify away from hydrocarbons may become more dependent upon Chinese technology and manufacturing. Energy transition consequently changes the nature of geopolitical vulnerability without eliminating it. The fifth finding concerns the increasing strategic importance of non-state actors. Hezbollah, Hamas, the Houthis, and Iran-aligned groups in Iraq and Syria have demonstrated that organizations outside the conventional state system can influence regional security calculations. Their importance is particularly significant because they can operate below the threshold of direct interstate war while still affecting the behavior of states.

Iran's network strategy demonstrates how a regional state can compensate for conventional military disadvantages through relationships with armed organizations. Such relationships provide strategic depth and allow Tehran to create multiple points of pressure across the region. Yet these groups possess their own interests and organizational identities. They should therefore be understood as semi-autonomous strategic actors rather than simply extensions of Iranian policy.

The Red Sea provides the strongest illustration of the economic consequences of non-state action. Houthi attacks on commercial shipping demonstrated that an organization operating in Yemen could affect maritime transportation well beyond the immediate conflict zone. The resulting diversion of shipping around the Cape of Good Hope increased transportation times and costs and exposed the vulnerability of global supply chains to regional conflict.

This finding has broader theoretical implications. Strategic power does not always depend upon the ability to conquer territory or defeat an adversary's military forces. In an interconnected global economy, disruption itself can constitute a form of power. A relatively

weak actor can create significant strategic costs if it targets a critical chokepoint upon which stronger actors depend. The sixth finding is that security is increasingly regionalized. Gulf states continue to rely heavily upon Western security relationships, but they are also diversifying defense procurement and investing in indigenous military capabilities. Türkiye, South Korea, China, and other states have become increasingly relevant to regional defense markets. The resulting diversification reduces exclusive dependence upon Western suppliers and gives regional governments additional strategic options.

This process does not represent complete strategic autonomy. Rather, it represents partial autonomy through diversification. Regional states continue to require external technologies, intelligence, military systems, and diplomatic support, but they increasingly possess multiple sources from which to obtain these resources.

Discussion

The findings indicate that the Middle East is moving from a relatively hierarchical regional order toward what may be described as negotiated multipolarity. This concept captures the distinctive nature of the contemporary region because power is neither concentrated exclusively in a single great power nor distributed equally among states. Instead, different actors possess different forms of influence and must negotiate their relationships across multiple issue areas.

The United States remains militarily dominant, but China has become economically indispensable to many regional states. Russia retains selective military and diplomatic influence. Regional middle powers possess economic and political resources that great powers seek to access. Non-state actors can disrupt security and economic systems without possessing conventional state power. The resulting order is therefore not simply multipolar; it is multi-layered.

This development challenges traditional theories of alliance politics. Classical balancing theory generally assumes that states respond to threats by aligning against the threatening power or bandwagoning with it. The behavior of contemporary Middle Eastern states demonstrates that a third possibility is increasingly important: hedging. States can cooperate simultaneously with competing powers and separate their relationships according to issue area.

The Gulf states illustrate this particularly clearly. A government may rely on the United States for military deterrence, China for infrastructure and trade, Russia for energy coordination, India for investment and labor relationships, and European states for financial and technological partnerships. This is not strategic inconsistency. It is a rational response to uncertainty.

Strategic hedging also reflects changing perceptions of external reliability. Middle Eastern states have experienced periods in which American policy has changed considerably from one administration to another. They have also witnessed China's rapid economic expansion and Russia's willingness to use military force. Diversification

therefore becomes a form of insurance. Maintaining multiple partnerships reduces the costs of unexpected shifts in great-power policy.

The rise of middle powers consequently represents one of the most important changes in regional politics. Their growing autonomy does not mean that they have become independent of great powers. Rather, their dependence has become more negotiable. The relationship between great powers and middle powers is increasingly characterized by bargaining rather than hierarchy.

Saudi Arabia's economic transformation demonstrates this relationship particularly well. Vision 2030 is simultaneously a domestic economic project and an international geopolitical strategy. The kingdom's attempt to become a global investment, logistics, tourism, technology, and energy hub requires engagement with virtually every major global economic center. Economic diversification therefore creates diplomatic diversification.

The UAE illustrates a similar process through a different institutional model. Its sovereign wealth, ports, airlines, logistics networks, financial centers, and international investment have provided instruments through which the state can extend influence beyond its geographical size. Economic connectivity becomes a source of geopolitical power. Qatar provides another variation. Its enormous natural-gas resources have given it the ability to maintain relations with actors that frequently disagree with one another. Energy wealth has therefore functioned not merely as an economic resource but as a diplomatic instrument.

These cases suggest that middle-power strategies in the Middle East cannot be understood exclusively through military capabilities. Economic resources, infrastructure, energy, investment, technology, and diplomacy have become components of comprehensive strategic power. China's role reinforces this argument. Beijing's influence increasingly operates through interdependence rather than military occupation or alliance. China does not need to replace the United States as the dominant security provider in order to acquire significant regional influence. Its economic relationships with Gulf states already give it considerable leverage.

At the same time, China's dependence upon Middle Eastern energy creates constraints. Beijing requires stability in the Gulf because disruptions threaten Chinese economic interests. This mutual dependence helps explain why China has an interest in diplomatic de-escalation. The 2023 Saudi-Iranian agreement therefore illustrates the changing structure of diplomacy. China was able to contribute to regional de-escalation because both Riyadh and Tehran possessed incentives to engage with Beijing. The agreement does not indicate that China has assumed the role historically associated with the United States. Instead, it demonstrates that regional diplomacy is becoming more pluralistic.

Russia represents a different model. Moscow has fewer economic resources but has demonstrated that military and diplomatic specialization can produce substantial influence. Russia's involvement in Syria showed that a relatively limited military intervention could

alter the balance of power and preserve an allied government. Russia's relations with Iran and Türkiye further demonstrate its ability to operate within complex regional rivalries.

The emerging order is consequently characterized by specialization among external powers. Washington provides security capabilities, Beijing provides economic connectivity, and Moscow offers military and diplomatic alternatives. Regional states exploit these differences.

The role of non-state actors creates an additional layer of complexity. Traditional international relations theory tends to treat states as the principal units of analysis, but the Middle East demonstrates that political authority can be distributed across states and non-state organizations. Hezbollah's military and political role in Lebanon, Hamas's political-military organization, the Houthis' control of significant territory in Yemen, and Iraqi militias' integration into political structures all demonstrate hybrid forms of authority.

The concept of proxy warfare is useful but insufficient. External sponsorship matters greatly, particularly in relation to Iranian support, but non-state organizations are not simply puppets. They have local constituencies, organizational survival strategies, ideological commitments, and political objectives. Their actions can therefore generate outcomes that sponsoring states may not fully control.

This phenomenon is especially important in asymmetric warfare. Non-state actors do not need to defeat technologically superior states. They can instead exploit vulnerabilities within highly interconnected systems. The Red Sea provides an extraordinary example. By threatening commercial shipping, the Houthis have been able to generate costs for international companies, regional governments, and major powers without possessing conventional naval capabilities comparable to those of the United States or European states.

This dynamic changes the meaning of strategic geography. A chokepoint becomes a strategic multiplier because relatively limited military capabilities can create disproportionate economic consequences. The Strait of Hormuz and Bab el-Mandeb are therefore not simply geographical locations. They are points where regional insecurity can become global economic insecurity.

The energy dimension reinforces this transformation. The Middle East remains central to the global oil and gas system, but the energy transition is creating new forms of geopolitical competition. Solar technologies, batteries, hydrogen, electricity grids, critical minerals, and digital energy systems are becoming strategically significant.

The Gulf states' response is particularly revealing. Rather than abandoning hydrocarbons immediately, they are attempting to become competitive across multiple energy sectors. This strategy protects their current revenue base while preparing for a potentially less oil-dependent global economy. Such diversification may, however, create new dependencies. The dominance of Chinese firms in renewable-energy manufacturing means that the transition toward clean energy can simultaneously deepen technological

dependence upon China. The geopolitical structure of energy is therefore being transformed rather than eliminated.

This finding has important implications for the study of energy security. Traditional energy-security analysis emphasized securing oil fields, pipelines, refineries, and maritime routes. Contemporary energy security must also consider technological supply chains, semiconductor access, battery production, electricity networks, digital infrastructure, and critical minerals. The Middle East is consequently becoming a central arena in the broader geopolitical competition over energy transition technologies. The economic and security dimensions are similarly converging. Ports, airports, logistics corridors, pipelines, telecommunications networks, data centers, energy terminals, and industrial zones are simultaneously economic assets and strategic infrastructures. Great powers increasingly compete through investment and connectivity, while regional states seek to transform themselves into nodes within global networks.

This suggests that geo-economics has become an essential component of regional security. The emerging regional order also demonstrates that economic interdependence does not automatically produce political harmony. China may depend upon Gulf energy while maintaining relations with Iran; Gulf states may depend upon Chinese investment while maintaining American security partnerships; and regional states may cooperate economically while simultaneously competing militarily.

Interdependence can therefore produce both stability and vulnerability. The future of the Middle East will depend partly upon whether regional states can convert economic interdependence into mechanisms for managing political conflict. If economic relationships generate incentives for restraint, they may contribute to regional stability. If competing powers use economic networks as instruments of coercion, however, interdependence may increase strategic vulnerability.

The emerging order is therefore neither inherently more peaceful nor inherently more unstable than the previous order. Its principal characteristic is complexity. The concept of negotiated multipolarity captures this complexity because it recognizes that regional order is continually renegotiated. Great powers seek influence, middle powers seek autonomy, non-state actors seek survival and leverage, and economic networks connect these actors in ways that prevent complete separation.

Conclusion

The Middle East is undergoing a structural transformation in which great-power competition, middle-power autonomy, non-state agency, economic diversification, and energy transition are becoming increasingly interconnected. The evidence examined in this study demonstrates that the region cannot adequately be understood through a simple narrative of American decline or Chinese rise. The United States remains the most powerful external military actor, China has become increasingly important as an economic and diplomatic partner, and Russia continues to exercise selective military and diplomatic

influence. Yet none of these powers possesses sufficient capabilities or legitimacy to impose a comprehensive regional order independently.

The emerging order is instead characterized by negotiated multipolarity. Great powers compete for access, influence, markets, strategic partnerships, and diplomatic relevance. Regional middle powers use this competition to increase their autonomy and bargaining power. Non-state actors exploit fragmentation and asymmetry to create strategic effects disproportionate to their conventional capabilities.

The growing autonomy of regional middle powers represents perhaps the most consequential change. Saudi Arabia, the UAE, Qatar, Türkiye, and other regional states increasingly refuse to organize their foreign policies around exclusive dependence upon one external power. Strategic hedging enables them to maintain security relationships with the United States while simultaneously expanding economic and diplomatic relations with China, Russia, India, Europe, and other actors.

Economic diversification reinforces this strategy. Vision 2030 and comparable Gulf development programs are not simply domestic economic initiatives. They are attempts to reposition regional states within global networks of investment, technology, logistics, tourism, energy, and finance. The result is an increasingly geo-economic conception of power in which sovereign wealth funds, infrastructure, ports, energy projects, and technological partnerships become instruments of international influence.

Energy remains central to this process. The global energy transition has not removed the strategic importance of the Middle East because hydrocarbons remain economically significant while renewable-energy technologies create new forms of dependence and competition. The region is therefore developing a multi-energy economy in which oil and gas coexist with renewable energy, hydrogen, advanced electricity systems, and emerging technologies.

The growing influence of non-state actors constitutes another defining characteristic of the new order. Hezbollah, Hamas, the Houthis, and other armed organizations demonstrate that regional power is no longer exclusively state-based. Their ability to influence maritime trade, deterrence, political stability, and escalation demonstrates that security analysis must account for organizations operating outside conventional state structures.

The Red Sea crisis illustrates the global consequences of this development. Disruption by a non-state actor in one regional maritime corridor can generate consequences for international trade, shipping costs, insurance, energy transportation, and global supply chains. Strategic vulnerability is therefore increasingly transmitted through networks of economic interdependence.

The emerging Middle Eastern order consequently presents both opportunities and risks. Multipolarity gives regional states greater freedom of action and reduces their dependence upon a single external patron. Economic diversification can increase resilience.

Diplomatic pluralism can create new opportunities for de-escalation. Yet fragmented power can also produce strategic uncertainty, arms competition, proxy conflict, and repeated crises.

The principal implication of this study is that regional stability cannot be constructed through great-power dominance alone. Nor can military deterrence provide a sufficient basis for long-term order. A sustainable Middle Eastern security architecture must incorporate regional diplomacy, economic interdependence, maritime security, energy cooperation, crisis-management mechanisms, and strategies for reducing escalation involving non-state actors.

The future Middle Eastern order will therefore be determined not simply by Washington, Beijing, or Moscow. It will also be shaped in Riyadh, Abu Dhabi, Doha, Ankara, Tehran, Jerusalem, Baghdad, Beirut, Sana'a, and other regional centers of political and economic power. More importantly, it will increasingly be shaped by actors that do not possess conventional statehood but nevertheless possess the ability to influence political and economic systems. The Middle East is consequently entering an era in which power is dispersed across multiple levels and expressed through multiple instruments. Great powers provide structural competition; middle powers convert competition into strategic opportunity; non-state actors transform asymmetry into leverage; and economic and energy networks transmit the consequences across national boundaries. Understanding this interaction is essential for explaining the contemporary Middle Eastern order and for anticipating its future trajectory.

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