



THE QATARI SANCTIONS EPISODE: CRISIS, RESPONSE, AND LESSONS LEARNED

BY RICHARD NEPHEW
OCTOBER 2020

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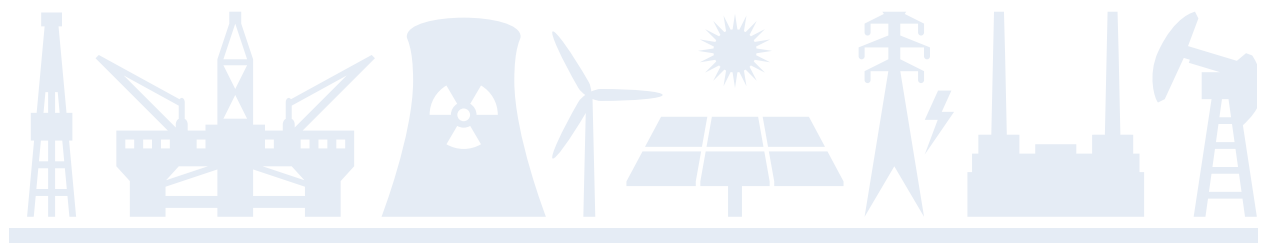
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EXECUTIVE SUMMARY

On June 5, 2017, Saudi Arabia, the United Arab Emirates (UAE), Egypt, and Bahrain announced that they were cutting diplomatic ties with and imposing sanctions on Qatar. The most formidable of these sanctions was a comprehensive blockade of Qatar, which involved the closure of the land border between Qatar and Saudi Arabia as well as banning Qatari planes from entering these countries' airspace. The coalition then embarked on a limited program of sanctions advocacy, seeking US, European, East Asian, and other regional support for their efforts.

Nearly three years after the crisis began, Qatar's economic indicators all point to the positive and the International Monetary Fund (IMF) has broadly concluded that the Qatari economy is structurally sound. Qatar faces some of the same issues and tensions that other hydrocarbon-dependent economies experience, but is in a comparatively strong position, particularly as relates to its future sanctions resilience as will be described below.

This paper, part of the broader sanctions work from the Energy Security program at Columbia University's Center on Global Energy Policy, sets aside whether the *cause* of the Qatari dispute with its neighbors justified the use of sanctions and examines the significance of the *execution* of those sanctions. Qatar's experience is not replicable in many contexts, given its sizable advantages in available resources. Nonetheless, how the country responded to and—in this paper's assessment—effectively defeated the sanctions campaign mounted against it points to several lessons about the design and implementation of sanctions.

Four findings are particularly important and revelatory:

1. There are profound risks to sanctions use and performance from inadequate preparation and study of the sanctions target and its motivations.
2. Even in a world of increasingly unilateral and “coalition” action, the imperative of bringing to bear as much international cooperation and support to a sanctions campaign as possible is undiminished.
3. The coalition's failure to identify credible off-ramps for Qatar and achievable diplomatic objectives undermined the sanctions campaign. Effective sanctions policy involves clarity on how to undo sanctions and communications with all sides as to what it will take to achieve this.
4. Overreaching on this case may undermine the possible use of sanctions in the future against Qatar and, perhaps, other future targets.

This last point bears underscoring: the demands made of Qatar did not match the leverage being applied, but did warn Qatar as to the threats that it faced from foreign economic coercion. Having been so attacked, the Qataris are resolved to not be subject to such pressure again in the future and have created sufficient flexibility, diversity, and reliability



in their supply chains and business arrangements that it would be very difficult for a future sanctions campaign to generate much pressure on the country unless it took on a truly global character. Moreover, Qatar now has the national confidence that it *could* manage under such circumstances, a psychological source of resolve that will serve it should the country face another such attack.

More than anything, the Qatari example highlights the main lesson of most sanctions policy failures: the problems were less in the application of measures or their enforcement, and more in the underlying policy concepts that led to their misapplication. Policymakers around the world contemplating the use of sanctions would be well served to look at the Qatari sanctions episode as a cautionary tale, showing how an ill-formed policy can ultimately undermine even legitimate complaints and result in a situation that even rewards the sanctioned party with greater resilience and capabilities. For this reason, they should not be used unless subjected to rigorous planning and assessment, ironically of the sort that Qatar is now pursuing as a means of defeating such sanctions campaigns that might be mounted against it in the future.



INTRODUCTION

Saudi Arabia, the United Arab Emirates, Egypt, and Bahrain announced on June 5, 2017, that they were cutting diplomatic ties with Qatar and imposing sanctions against the country. The most formidable of these sanctions was a comprehensive blockade of Qatar, which involved the closure of the land border that Qatar has with Saudi Arabia as well as the closure of airspace. The coalition then embarked on a limited program of sanctions advocacy, seeking US, European, East Asian, and other regional support for their efforts. A few other countries joined the core four in cutting off diplomatic ties but, by and large, these four countries found themselves alone in their sanctions endeavors.

Still, given the dependence that Qatar had on Saudi Arabia for food imports and on the UAE for shipping services more generally, one might have expected fairly dramatic and sustained economic damage on Qatar. Initial reports seemed to support this expectation, including pictures that showed empty shelves in Qatari supermarkets and a sense of panic among Qatari citizens and residents. But within a matter of weeks (if not days), it seemed that the worst had passed, barring a true, wide-ranging coalition emerging to create sanctions momentum and complete Qatar's isolation; this did not happen.

Now, more than three years after the crisis began, Qatar's economic indicators all point to the positive and the International Monetary Fund has broadly concluded that the Qatari economy is structurally sound. Qatar faces some of the same issues and tensions that other hydrocarbon-dependent economies experience, but is in a comparatively strong position, particularly as relates to its future sanctions resilience as will be described below.

Qatar's story is of profound significance for the study of sanctions. How the country responded to and—in this paper's assessment—effectively defeated the sanctions campaign mounted against it points to several lessons about the design and implementation of sanctions. Qatar's experience is not replicable in many contexts; it is hard to find too many sanctions targets that have \$166 billion gross domestic product (GDP)¹ (and nearly \$70,000 per capita GDP in 2019²), a reasonably well-run and efficient government, and a comparatively accessible geographic position. Moreover, Qatar itself enjoyed agile leadership that was prepared to think creatively in the moment to respond to the crisis, something that other sanctions targets may lack. Nonetheless, Qatar's very advantages and effectiveness highlight some of the factors that ought to be considered by sanctioners before they undertake their task, highlighting that the decision to impose sanctions should be taken with care in all circumstances.

This paper will begin with a review of the background of the crisis and its immediate effects. It will then transition to discuss Qatar's policy responses and their results. It concludes with an identification of four key lessons from the crisis and use of sanctions. Broadly speaking, this paper concludes that the decision to impose sanctions on Qatar was unsuccessful and probably destined to be so from its inception. Qatar almost immediately responded in a way that diluted the pressure imposed against it and, ultimately, has reformed its economy in such a manner as to reduce the future effects of sanctions pressure against it. Qatar remains



vulnerable to a truly global coalition of countries, but—in the author’s judgment—it would take that in order to deliver real pain against Qatar. Moreover, Qatar continues to plan against such scenarios, meaning that it will likely prove more resilient against sanctions pressure in the future. The absence of substantive policy concessions from Qatar only reinforces the futility of the campaign.

Considered more generally, the lesson of the Qatari experience is that economic leverage—even if expressed in large round numbers, such as Qatar’s previous dependence on Saudi Arabia for its food imports—is not a proxy for economic control or dominance. Sanctioners must look beyond raw data and, as concluded in *The Art of Sanctions*, examine more carefully the full range of a country’s resolve in resisting sanctions pressure before embarking on a sanctions campaign.



METHODOLOGY

It should be noted that this paper is informed by both publicly available economic data and other sources, as well as interviews conducted by the author with a variety of contacts inside and outside of Qatar. Government officials from Qatar, Europe, and the United States were consulted in the research, as well as market participants and other representatives from a range of countries. In order to permit the greatest possible candor, the author extended the courtesy of anonymity to those who were unprepared to be cited publicly. This request was seen as particularly important in some cases due to the ongoing efforts on the part of Qatar, Saudi Arabia, the UAE, and others to resolve the crisis, and a desire to avoid creating complications for those efforts. In all cases, the author was able to identify publicly available sources to corroborate the comments and perspectives offered, except where noted explicitly. Publicly available quotes from media stories were used in some cases to substantiate the opinions expressed and facts conveyed.



BACKGROUND ON THE CRISIS

A Turbulent History

Though the blockade against Qatar began in June 2017, its roots stretch back much further. Some interlocutors in Qatar pointed all the way back to disputes that are generational, stemming from pre-modern period tribal conflicts. But, the precipitating factors that led to the current crisis can be reasonably grouped in three baskets:

- Disagreements over how to deal with the Islamic Republic of Iran;
- Disagreements over how to respond to regional tumult, Islamist groups, and terrorist organizations; and,
- More fundamental frustration over the nature of regional leadership and political dynamics.

With respect to Iran, Qatar has been one of a few countries in the region that has chosen to maintain relations and engage in trade with Iran since the revolution. In fact, as a consequence of sub-surface geology, Qatar and Iran are destined to remain connected: Qatar and Iran share one of the world's largest natural gas fields. Qatari leaders meet regularly with their Iranian counterparts and there is a steady pattern of normal trade between the two countries, valued in the hundreds of millions of dollars annually.³ Qatar has even supported Iran at the United Nations Security Council; in July 2006 Qatar was the only country to vote against Resolution 1696, which created a deadline for Iran to respond to calls for negotiations from the members of the P5+1 (China, France, Germany, Russia, the United Kingdom, and the United States). But then, under considerable US pressure, Qatar joined the rest of the UN Security Council in passing the first sanctions against Iran with the adoption of United Nations Security Council Resolution (UNSCR) 1737 in December 2006 and UNSCR 1747 in March 2007. Altogether, though there have been strains in the relationship, Iran and Qatar have managed to sustain real ties over the last 40 years.

This relationship between Qatar and Iran has contributed to unease with Qatar's Arab neighbors—particularly with Saudi Arabia. Though the Saudis have maintained an embassy in Iran and engaged in negotiations over matters such as the Hajj, the Saudis have made no secret (especially in the last 20 years) of their preference that the Gulf Cooperation Council (GCC) members speak with one, critical voice with respect to Iran. Iran has therefore been a considerable source of tension in the GCC-Qatar relationship.

Alone, differences with Qatar over its relationship with Iran would not be sufficient to compel the blockade. As one reviewer noted, Qatar is not alone in maintaining diplomatic and trading relations with Iran; in fact, the UAE has billions in annual trade with Iran and maintains an embassy in Tehran.⁴ Qatar has also embraced a variety of Islamist and terrorist groups that has led to tensions. For example, Qatar has maintained a cordial relationship with the Muslim Brotherhood, angering both the Mubarak and Sisi regimes in Egypt. Qatar, together with



Turkey, has also supported other, more Islamist-leaning non-state actors in the Syrian and Libyan civil wars, while Saudi Arabia, the UAE, and Egypt have gotten behind different sets of less religiously conservative proxies. In fact, in 2014, Qatar's stance on the Arab Spring and its aftermath led to an initial breach in relations between Saudi Arabia, the UAE, Bahrain, and Qatar that was only repaired as a result of mediation conducted by Kuwait. Qatar also maintains relations with Hamas and other groups deemed by the United States and many other countries to be terrorist groups; for this reason, the United States has often put political pressure on Qatar to change its stance and this may have contributed to a sense that—in a crisis—the United States would back Saudi Arabia and its bloc over Qatar.

Qatar, for its part, maintains that its relationships with these groups are its own affair and that Saudi Arabia, the UAE, Egypt, and Bahrain (in particular) are not immune from charges of inappropriate relationships with bad actors. One interlocutor in Qatar took pains to outline the nature of these relationships, the involvement of Saudi, Emirati, Egyptian, and Bahraini citizens in the 9/11 attacks, and in radical groups operating in Syria.⁵ He likewise noted the diversion of US-origin weaponry from Saudi Arabia to such groups. Setting aside the veracity of these charges and countercharges (as well as the fact that a more reasonable position might be that none of these groups *should* receive assistance and support from *any* state in the region), that these disagreements exist and have been sustained over many years is sufficient for them to have played a role in the crisis.

In fact, interlocutors in several different locales underscored that the issue of regional group support obscures the deeper meaning of the dispute: that Qatar has refused to accept leadership from the Saudis. Both within groups like the GCC and as a result of the Saudi king's role as Custodian of the Two Holy Mosques, there is widespread acknowledgment that the Saudis believe they can and should serve as the leaders of the Gulf region, if not the entire Arab world. The Saudis have therefore expressed considerable frustration when their attempts to exercise this leadership have been rejected. Qatar is not the only country to be so targeted; Oman too has been the target of political pressure for its stances that are contrary to the express wishes of the Saudis. (In fact, contacts in Saudi Arabia have been direct in the past that part of their frustration with the Joint Comprehensive Plan of Action [JCPOA] reached with Iran lies in the fact that Oman was trusted to serve as an interlocutor, while Saudi Arabia learned about the initiative via the media.) There are also long-simmering personal and political disputes among the various rulers of the Gulf Arab states; some of the tensions with Qatar are a holdover from the mid-1990s removal of Emir Khalifa bin Hamad al-Thani by his son Hamad, who is the father of Qatar's present Emir,⁶ and counterattacks mounted against Hamad from Saudi Arabia and the UAE.

These tensions have not prevented the countries involved from resolving other disputes or having reasonably positive relations in the past. In the 2000s, for example, Qatar formally resolved border disagreements with Saudi Arabia and Bahrain. Qatar has also been an important player in regional security developments, such as through its hosting of a US military installation since 1996, the al Udeid Air Base, which serves as a major logistics, command, and basing hub for US forces in the region.⁷ But the sum total of frustrations with Qatar created an atmosphere that was conducive to a future crisis developing with the country.



2017's Crisis

In late May 2017, a reported hacking attack of the Qatar News Agency resulted in the publication of a variety of articles that “cast positive light on Iran, Israel, the Muslim Brotherhood, and Hamas.”⁸ Some of these articles included statements attributed to the Emir of Qatar, Sheikh Tamim bin Hamad al-Thani. The Qatari government has consistently denied the legitimacy and authenticity of the statements and the articles, and it has suggested that they were the result of not just anonymous hackers but also those seeking to prompt a crisis.

In any event, on June 5, the governments of Saudi Arabia, the UAE, Bahrain, and Egypt responded by severing diplomatic relations with Qatar. They also announced that they would shut their borders to Qatar, creating a comprehensive embargo of the country. Given that Saudi Arabia held the *only* land border with the country (see Figure 1), the result was that Qatar became an island (something that Saudi Arabia suggested it would make more than rhetorical by digging a trench along the border⁹). Under pressure from the others, Jordan, Yemen, Libya’s “eastern government,” the Maldives, Mauritania, Comoros, Djibouti, Chad, and Niger joined the central four of the initiative in similar actions, either scaling back relations with Qatar or curtailing them altogether.

In practical terms, the sanctions imposed were direct and simple:

- Saudi Arabia, the UAE, and Bahrain’s air, land, and sea cordon effectively halted any shipments to Qatar as well as traffic to it using their territory. This had an immediate effect on the air traffic routes used in the Persian Gulf.¹⁰ Prior to the cordon, air traffic to and from Qatar went across the UAE, Saudi Arabia, Bahrain, and other countries. After it was instituted, all traffic poured into Qatar from one direction, primarily using Iranian airspace, creating a siphon-like effect.
- All goods to and from those four countries were also prohibited for export to Qatar, along with imports from it, *with the exception* of the UAE’s purchase of natural gas. Throughout the crisis, the UAE continued to purchase natural gas from Qatar—estimated at 30-40 percent of Emirati energy needs¹¹—which also benefited Qatar.
- All Qatari citizens located in those four countries were ordered to be expelled.



Figure 1: Map of Qatar and neighbors

Source: Google Maps

Shortly after the crisis began, on July 12, 2017, the Saudis and their partners issued a list of 13 demands for Qatar. These were:

1. Curb diplomatic ties with Iran and close diplomatic missions there. Expel members of Iran's Revolutionary Guards and cut off any joint military cooperations with Iran. Only trade and commerce with Iran that complies with US and international sanctions will be permitted.
2. Sever all ties to "terrorist organizations," specifically the Muslim Brotherhood, Islamic State, al-Qaida, and Lebanon's Hezbollah. Formally declare those entities terrorist groups.
3. Shut down Al Jazeera and its affiliate stations.
4. Shut down news outlets that Qatar funds, directly and indirectly, including Arabi21,



Rassd, Al-Araby Al-Jadeed, and Middle East Eye.

5. Immediately terminate the Turkish military presence in Qatar and end any joint military cooperation with Turkey inside Qatar.
6. Stop all means of funding for individuals, groups, or organizations that have been designated terrorists by Saudi Arabia, the UAE, Egypt, Bahrain, the US, and other countries.
7. Hand over “terrorist figures” and wanted individuals from Saudi Arabia, the UAE, Egypt, and Bahrain to their countries of origin. Freeze their assets, and provide any desired information about their residency, movements, and finances.
8. End interference in sovereign countries’ internal affairs. Stop granting citizenship to wanted nationals from Saudi Arabia, the UAE, Egypt, and Bahrain. Revoke Qatari citizenship for nationals where such citizenship violates those countries’ laws.
9. Stop all contact with the political opposition in Saudi Arabia, the UAE, Egypt, and Bahrain. Hand over all files detailing Qatar’s prior contacts with and support for those opposition groups.
10. Pay reparations and compensation for loss of life and other financial damages caused by Qatar’s policies in recent years. The sum will be determined in coordination with Qatar.
11. Consent to monthly audits for the first year after agreeing to the demands, then once per quarter during the second year. For the following 10 years, Qatar would be monitored annually for compliance.
12. Align with the other Gulf and Arab countries militarily, politically, socially, and economically, in line with an agreement reached with Saudi Arabia in 2014.
13. Agree to all the demands within 10 days of submission to Qatar, or the list becomes invalid.¹²

Though there was some talk about the United States and others joining the sanctions campaign—including tweets from Donald Trump that suggested such action was not just possible, but likely¹³—it was promptly dismissed due to the realities of the US military presence in the region and in Qatar in particular, the broader US-Qatar relationship, and the desire to avoid involving the United States more centrally in the dispute. Instead, the sanctions announced by the four central Arab players were and remain the only significant measures imposed.

The sanctions were still of immediate consequence for Qatar.

First, there were the immediate, direct effects of the measures themselves, starting with lost food imports. Prior to the crisis, Qatar imported the majority of its food from abroad, including 40 percent directly across the land border that the Saudis closed. Contacts in Qatar report that the immediate assessment was that the country possessed one to two days worth of fresh fruit and only slightly larger stocks of other fresh goods.¹⁴ Qatar had slightly larger



stocks of packaged food, owing to its ability to sit on shelves and therefore in warehouses, but the blockade created an instant sense of vulnerability and crisis. Pictures began flooding the internet, suggesting that shelves in Qatar were empty and that the country was on the verge of starvation.¹⁵ Contacts in Qatar's food industry suggested that these stories were always a bit exaggerated, but they acknowledged that the blockade did create immediate shortages of some goods and a need for government intervention.

Second, and related, the Qataris faced a major depletion of their national financial reserves as they dealt with simultaneous changes to their various supply networks and a need to compensate for their curtailment. The IMF reported that while Qatar held reserves sufficient for 6.1 months of imports in 2016, this dropped to 2.7 months as a direct consequence of the need to finance more expensive short-term solutions to their difficulties and then, in the months that followed, more durable arrangements.

Third, Qatar had to cope with lost confidence across a variety of sectors and industries. For example, Qatar lost significant tourist revenues, as it had been a destination for visitors from around the Persian Gulf, and simultaneously had to deal with rearranged flight routes and other inconveniences. The sense of crisis also convinced some international travelers to stay away from the country. Qatari real estate also suffered, though this took somewhat longer to manifest, and prices fell by 14 percent between 2017 and 2018. Contacts in Qatar reported this was directly linked to the withdrawal of Saudi and Emirati investors from the country, but they also said that over-building in the country made a market reset somewhat inevitable in this timeframe.¹⁶ As the IMF noted subsequently, immediately after the crisis, foreign financing and resident private sector deposits declined by approximately \$40 billion, affecting liquidity and prompting central bank intervention (more on this below).¹⁷ Likewise, the Qatari stock market was an immediate victim of the blockade, tumbling by over 7 percent in the worst one-day drop in the country since 2014.¹⁸ Moody's cut Qatar's sovereign credit rating from stable to negative,¹⁹ and S&P cut its long-term rating by one notch to AA- and "put the rating on CreditWatch with negative implications,"²⁰ suggesting further downgrades would be possible.

Altogether, by the end of the summer of 2017, the Qatari economy seemed to be badly damaged and likely to get worse.



QATAR'S RESPONSE AND RESULTS

However, by the time the IMF was able to conduct its May 2018 consultation with Qatar, the outlook for the country was decidedly more rosy. The IMF summarized its reaction as follows: “Considerable buffers and sound macroeconomic policies have helped Qatar successfully absorb shocks from lower hydrocarbon prices and the diplomatic rift with some countries in the region.”²¹ The rest of the assessment of Qatar was similarly positive, noting that “Qatar has ample fiscal space...to ensure sufficient saving of the hydrocarbon wealth for future generations” and “the banking sector is healthy.”²² There were the common suggestions for improvements and for steps the Qatari government ought to take in order to improve and sustain performance, but the picture of the country's economy was a far cry from what was anticipated 10 months previous. This is because the country was able and willing to take crucial steps early in the crisis to mitigate the damage and—as will be demonstrated—actually use the crisis as a means of improving the baseline national economy and its resilience.

In this section, the author examines the Qatar's steps and their consequences; in the next, the author assesses the lessons that Qatar's experience can have for the sanctioned and the sanctioners more generally.

Assessment and Planning

In the immediate aftermath of the blockade, Qatar was reeling from a significant set of economic shocks. But, according to both foreign and Qatari accounts alike, the government was able to quickly assess the country's overall situation—particularly as related to critical goods, like food—and develop response plans. According to a food industry source, for example, the government first set out to establish a baseline assessment of the amount of food located within the country and how many days worth of supply it represented.²³ The fact that there were relatively few distributors and suppliers within the country aided this effort, enabling rapid information collection and collation.

Once assembled, the government and private sector were able to use this data to identify key shortfalls. As noted, fresh food—especially fruit, eggs, and milk—were identified as in particularly short supply. The government then set out to identify geographically close suppliers for these goods. The blockading countries were naturally excluded from this analysis, but given the geography of the Middle East and Qatar's position in it, this also meant excluding some of the closest neighbors with readily available supplies. Qatar instead turned to Turkey and Iran (the latter somewhat ironic because of the centrality of Qatari relations with Iran to the development of the crisis in the first place). Qatar also looked for sources from farther away—including Australia—and began to commission and requisition support from the private sector's transportation network. Within 24 hours, Qatari Airlines planes were arriving with their cargo holds filled with fresh food.

But the Qataris recognized that they were dealing not only with a supply disruption, but also with a public relations problem, in that Qatari citizens and residents feared real deprivation.



The Qatari government therefore undertook more direct measures to manage supply. First, they created offices within the wholesale and retail markets to gather more data on existing supplies and expected needs. Then, this information was relayed back to the main government coordination mechanisms so that additional supplies could be identified and procured. Qatari officials noted that they provided this information to the private sector so that they could then negotiate contracts and engage transportation networks to arrange for supply, but underscored that their intervention helped to ensure that the marketplace as a whole was reassured and connected to the initiative.²⁴ They noted further that they had established complete coverage of Qatar within one week of the crisis's emergence. Once the immediate crisis passed, studies were commissioned and undertaken to identify overall purchasing and consumption patterns so as to avoid even moderate shortfalls through prioritized procurement. As the crisis began during Ramadan (when Muslims fast in honor and celebration of the revelation of the Quran), they were particularly sensitive to the types of foods usually consumed both for Eid (which was June 25 that year) and the nightly iftar feast to break the daily fast, such as chicken and eggs. But according to both Qatari and foreign contacts, by the time of Eid, much of the disruption created by the embargo had already been resolved through the creation of new supply channels.

The Qataris then set out to solve their longer-term supply problem, particularly by ensuring firm national control over future food supply. Much of this was achieved by a self-sufficiency drive within the country's territory that predated the crisis (a Qatar National Food Security Program was launched in 2011). Two years after the 2017 embargo began, the Economist Intelligence Unit cited reports from the Qatari government that the country "now meets more than 90 percent of its needs for chicken and dairy products."²⁵ The country also has plans to be 70 percent self-sufficient in vegetables by 2023,²⁶ with similar plans outlined in the 2018 National Development Strategy for self-sufficiency and indigenous production and manufacture of goods across industries.²⁷

In fact, the latter point is a theme that was often repeated by Qatari and foreign officials in Doha: an agreed sense within the country that security and stability can only be achieved through internal resilience and independence from other countries in the region and their supporters abroad. Contacts in the country's food industry noted that this has now led to the creation of national strategic reserves of food products, back-up trade arrangements, storage facilities in-country and abroad, and advanced scenario planning to deal with future disruptions. The latter point was particularly stressed as a source of innovation and new investment for the country, as scenarios as diverse as future embargoes becoming blockades, regional war, climate change, and natural catastrophes have all been contemplated.²⁸

More generally, though the crisis affected Qatar's economy, as of 2019, the IMF was reporting that it had recovered well and stood likely to grow in the future.²⁹ The Economist Intelligence Unit's estimates—Table 1—demonstrate growth across all major sectors, which the IMF's information broadly supports.

Perhaps more interestingly, as time has gone on, more attention has been paid to the role that collapsing oil prices might have had on the Qatari economy. Though the embargo crisis represented a particularly sharp inflection point and was especially significant vis-à-vis



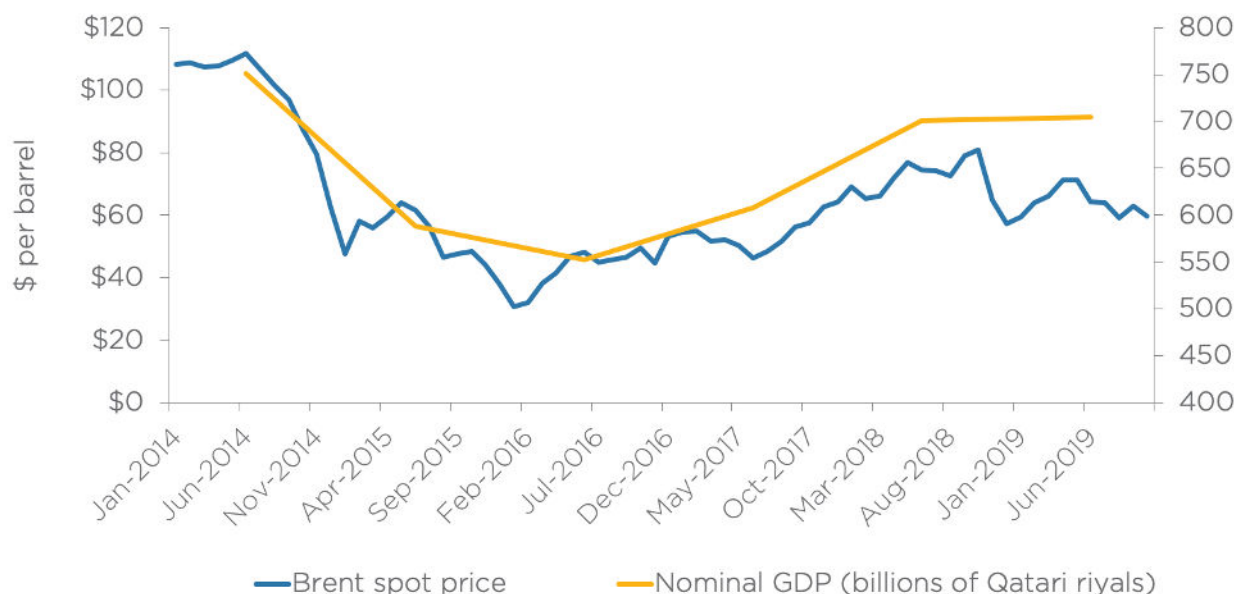
food imports, Qatari GDP trends actually match developments in the oil market, as Figure 2 shows, with expected concomitant effects on natural gas prices and revenues. As with many countries in the region and oil producers more generally, the period of 2014–2016 was one of considerable difficulty as hydrocarbon prices dropped significantly; the IMF’s analysis places substantial blame on the overall hydrocarbon market for the economic problems that faced Qatar during this period. Surprisingly, stability and slightly higher oil prices over the course of late 2017 until the early 2020 oil price war, followed by the coronavirus and its significant impacts on global oil demand, contributed substantially to the Qatari economy during its recovery from the crisis as well. Qatar also benefited from the fact that a substantial portion of its hydrocarbon exports are of liquefied natural gas (LNG), which are mostly under long-term contracts with set prices.

Table 1: Qatar’s economic growth by year (percentage)

	2019 ^a	2020 ^b	2021 ^b	2022 ^b	2023 ^b	2024 ^b
GDP	1.4	2.9	2.8	3.8	3.3	3.9
Private consumption	3.0	4.0	3.5	4.0	3.0	2.9
Government consumption	3.0	4.1	4.5	4.6	3.8	4.0
Gross fixed investment	2.5	4.3	5.2	5.5	4.0	4.2
Exports of goods and services	1.1	2.5	3.0	5.0	4.5	5.0
Imports of goods and services	6.0	5.0	7.5	9.0	6.5	6.0
Domestic demand	2.7	4.2	4.6	4.9	3.7	3.8
Agriculture	-1.0	3.0	5.0	8.0	7.0	6.0
Industry	1.2	0.9	3.0	2.8	5.0	17.3
Services	1.3	2.2	2.0	4.0	2.5	3.1

Sources: a) Economist Intelligence Unit estimates, b) Economist Intelligence Unit forecasts



Figure 2: Brent spot price compared to Qatari nominal GDP

Source: EIA, IMF

An irony of the latter point is the degree to which Saudi efforts to fix their own economic problems required them to make policy changes and seek production constraints that directly benefited their adversaries in Doha (and, perhaps, Tehran as well). This was most obviously manifest in the agreement between OPEC states and the Russians to cut and hold production. However, a mirror result also took place in geopolitical spaces, especially within the Qatari population. Though there may have been some hope in Riyadh, Abu Dhabi, and elsewhere that the crisis in Qatar would result in popular unrest, the opposite was true. Pictures of Qatari Emir Sheikh Tamim soon festooned Qatar's public spaces and support for the Qatari government was widespread throughout the country. Flags saw an even greater presence in public spaces, as were national colors in garments. Foreign embassy officials report that the embrace of the government was entirely grassroots-driven; one diplomat privately said that if Sheikh Tamim were to run for his office, he would win 98 percent of the popular vote.³⁰ Polling in the country tends to confirm these anecdotal reports, particularly relating to confidence in the overall direction of the country.³¹ The author's own observations in Qatar in late 2019 confirm that, when questioned, average members of the public express confidence in the government, support for its policies, and a substantial measure of pride in having faced a considerable onslaught of pressure and prospered nonetheless.

Diplomatic Results

This positive public outlook informs what ought to be the most important assessment of the sanctions campaign: its effects on the underlying sources of crisis and tension that led



to sanctions in the first place. For the sanctioning parties, a useful metric is whether the Qataris sufficiently addressed any of the items on the list of 13 demands identified above so as to justify removal of sanctions. Although a contact close to the UAE noted that the list is aspirational and not necessarily intended to be completed all at once, it usefully describes the main issues that precipitated the crisis. If not, the sanctioners have a secondary assessment to make: if further sanctions pressure is likely to bring about such policy changes.

There have been some indication of Qatari readiness to address the concerns raised, but even this grudging willingness has been limited to a few areas.

For example, there are some indications that the Qataris understand the degree to which their relations with groups such as the Muslim Brotherhood compromised their relationships in Arab world more generally. Press reports from November 2019 indicate that Qatari officials offered to sever the country's ties with the Muslim Brotherhood as part of a *quid pro quo* for Saudi Arabia and other countries ending the sanctions regime.³² Qatari foreign ministry officials declined to confirm the proposal and the concept that lies behind it during meetings with the author in December, but others in Doha—including a foreign representative in the country—said that it was a plausible step the Qataris might pursue.³³ But another Qatari official forcefully rejected even the characterization of Qatar's foreign relations with Islamist groups at the center of the current controversy as problematic. He recited the national origins of the 9/11 hijackers, arguing that if any governments have inappropriate associations with terrorism, they are those which have imposed the sanctions on Qatar in the first place.³⁴ He similarly argued that Qatar's ongoing efforts to improve its counterterrorist financing regime (the country is preparing now for its anti-money laundering and counterterrorist financing system to be evaluated by the Financial Action Task Force), participating in intelligence sharing arrangements that seek to identify and combat terrorism, and other activities underscore the seriousness with which Qatar undertakes its counter-terrorism responsibilities. For this reason, this official rejected wholesale the idea of Qatari concessions with respect to the terrorism-related priorities identified on the list. A contact close to one of the sanctioning states noted that this is a natural reaction from Qatar and that there should be no surprise with Qatar's refusal to "admit it," but expressed with confidence the idea that Qatar has only changed its approach in this regard in response to other Arab state pressure.³⁵

A similar position of resistance can be described with respect to the demands that relate to Iran, cooperation with Turkey, monthly audits of Qatari policy, and so forth. In fact, Qatari relations with Iran and Turkey have arguably only improved as a result of the embargo. In the last 10 months, Qatar welcomed Iranian Foreign Minister Javad Zarif as a featured speaker at the December 2019 Doha Forum, and Sheikh Tamim traveled to Tehran in January 2020 for an official visit, during which he reportedly offered \$3 billion in aid to help the Iranians compensate victims of the Ukraine-bound Flight PS752, which Iran shot down.³⁶ In September 2020, the Iranians and Qataris discussed setting up electricity trade via connections between their grids.³⁷ Sheikh Tamim traveled to Turkey in early February 2020 to underscore the importance of close relations,³⁸ and, as several officials noted, Turkey's steadfast support of Qatar over the last three years during the Gulf Arab embargo has been seen as solidifying an already strong partnership. Ties with both Iran and Turkey are not without controversy and disagreement within Qatar—reportedly, Sheikh Tamim dismissed his prime minister



over differing views concerning Turkey—but nonetheless, the relationships appear to be at least as close as prior to the onset of the crisis. The aforementioned contact close to one of the sanctioning states questioned whether Qatar’s relationship with both countries is materially stronger than it was before, noting that while it might be more public, the intensity of cooperation predated the sanctions. He also suggested that, by making the relationship more public, the sanctioning powers had exposed the overall nature of the relationship.³⁹ He similarly noted that, while Al Jazeera may remain on the air, skepticism of it had increased abroad, including in Washington, where an Al Jazeera affiliate was required to register as a foreign agent under the Foreign Agent Registration Act (FARA) in September, as Chinese media outlets have been required to do.

That said, in sum, it is difficult to conclude that the sanctioning states have made much progress toward checking items off of their “wish list” for Qatari policy shifts. Moreover, Qatari officials argued strongly that the source of the dispute with Saudi Arabia, the UAE, and others lies in a more fundamental issue—the independent foreign policy of Qatar—and that this is one area in which Qatar is unprepared to discuss, much less accommodate, Saudi and other complaints.

The question then becomes whether continued pressure would likely shift Qatar’s positions on these points. Certainly, Qatari officials have offered no such indication and, far from it, have stressed that they are ever more prepared to resist the pressure being applied against them. Every Qatari official queried on the subject underscored that the Qatari population would particularly oppose any concession to the Saudis and others, noting that the attacks launched against them as a result of the food embargo imposed in June 2017 have heightened popular sensitivity.

But even putting aside the degree to which this matters (given the nature of the Qatari government) and the possibility of diplomatic language obscuring the nature of any concessions that might be made, there is a palpable sense among Qatari officials that they do not need to make concessions because the sanctions imposed against them no longer matter economically. Instead, officials—both Qatari and foreign—point to statements and changes in position from the Saudis and the Emiratis in particular, which demonstrate that, without shifting its policies substantially, Qatar may soon be out from under the sanctions. Qatar joined an emergency meeting in Riyadh after the September 2019 Iranian attacks on Saudi Aramco’s Abqaiq facility and expressed its support for collective security in the Persian Gulf.⁴⁰ In late 2019, the Saudis extended invitations to meetings in Riyadh to Sheikh Tamim, and Saudi Arabia, the UAE, and Bahrain all participated in a regional soccer/football tournament in Qatar.⁴¹ There is no indication that Saudi Arabia or the UAE would decline to participate in the 2022 World Cup to be held in Qatar, should they qualify.⁴² In February 2020, the UAE restored postal service with Qatar.⁴³

Of course, none of this changes the existing embargo against Qatar, which remains otherwise in place. In January 2020, a foreign embassy contact noted that, though there are signs of a thaw between the various protagonists, there have been such signs before, to no avail. When queried, the contact close to one of the sanctioning states expressed the bloc’s clear disinterest in removing the measures notwithstanding their muted effects because, though they may not be harming Qatar to the extent desired, neither are they damaging the Saudis,



Emiratis, or others. All other things being equal, it does not appear likely that the existing sanctions will be sufficient to coerce a change in Qatari policy, that sanctions will be eased, or that additional measures will be adopted soon.

Of interest now are the lessons that can be taken from this example and their application to future sanctions policy.



LESSONS LEARNED

There are manifold lessons that might be taken from the Qatari sanctions episode with respect to regional politics, the perils of personal ambition eclipsing national interest in policy making, and the dangers of mixed signals in international relations. But, for purposes of the study of sanctions themselves, there are four that seem most revelatory from an examination of the Qatari case:

1. Risks from inadequate preparation and study of the sanctions target and its motivations
2. Imperative of multilateral support and international cooperation
3. Identification of credible off-ramps and diplomatic objectives
4. Perils of overreach

These will be addressed in turn.

Risks from Inadequate Preparation

The Saudis, Emiratis, Egyptians, and Bahrainis clearly spent some time considering their perceived threats from Qatar and its approach to foreign relations. Their history includes many different periods of disagreement with Qatari leadership over regional policies, particularly as relates to insurgent groups and Iran. Moreover, though Qatar is a distinct country with its own culture (especially political culture), it is not so removed from Saudi Arabia and its partner societies so as to be alien. There were—and may be again—multiple points of cultural and sociological overlap among these neighbors, and their relationships go back long enough that both a common heritage and a generally consistent pattern of thought and behavior can be ascribed to all of the protagonists in this conflict. Therefore, there may have been a perception among the Saudis and their coalition—and certainly in the broader international audience—that the sanctioning coalition understood their target well and were effectively positioned to mete out decisive pressure against it.

As has been demonstrated above, this did not happen. The question is why.

First and foremost, though a cutoff in diplomatic relations had occurred in the past and the countries imposing sanctions were able to quickly position themselves to curtail their economic activities with Qatar, there was otherwise scant attention paid to the second and third moves in the application of sanctions pressure. It took over a month for a formal list of demands to be registered with Qatar. Saudi and other sanctioning state rhetoric was clear in its enunciation of a split with Qatar, but the cause behind the split remained vague enough that many governments were unable to offer a position on the conflict until several days had passed. This reflects the lack of homework undertaken by Saudi Arabia, the UAE, Egypt, and Bahrain in their decision to impose the embargo, particularly as relates to communicating their complaints, their intentions, and their desired end state to the rest of the world. In fact, it is



possible that they themselves did not know what would constitute an effective Qatari remedy.

Linked to this unpreparedness was the absence of any consideration of what Qatar would do once sanctioned. It is possible that sanctioning officials looked no farther than the baseline economic statistics prior to the crisis to identify their sanctions tools and did not consider how Qatar might react; we are still too close to the crisis for a definitive historical rendering of the decision-making process. Even if there was awareness of Qatar's most likely attempts to avoid the impact of sanctions, Saudi Arabia and the others employed no effective opposition to counter Qatari evasion. A Qatari official told the author that the Saudis and Emiratis tried to scare alternative suppliers of food, for example, saying that they would risk being cut off from business in the sanctioning countries if they worked with Qatar, but that these suppliers were unconvinced of this risk and—in any event—decided to act.⁴⁴ The end result was the same: Qatar's immediate sanctions evasion responses were not met with any meaningful sanctioning state reaction, so that the vulnerability being exploited by the sanctioners was swiftly protected.

Perhaps most perniciously, the fact that the primary vulnerability appeared to be food supplies was particularly counterproductive. If the sanctions were intended to diminish popular support for the Qatari government and undermine its legitimacy, the plain fact is that the opposite took place. Several Qataris informed me that the level of popular resentment for Saudi Arabia, the UAE, and other sanctioning states is such that, even if sanctions were to be relieved, Qatari citizens would continue to reject Saudi and other products. Indeed, the degree to which “Made in Qatar” was a prominent part of advertising, quite similar to signage in US shopping centers, was notable. One non-government Qatari citizen said that because the sanctions seemed to target food, the Qatari government could argue convincingly that the Saudis and their partners were attempting to starve out the population and then act swiftly in a manner that burnished its own image among the population as providing humane and efficient governance.⁴⁵

Though it is now a counterfactual point to argue, it is possible that had the Saudis and their partners targeted a different Qatari vulnerability—such as the oversaturated real estate market—with more subtle sanctions, then the pressure on Qatar might have initially been less severe but perhaps of a more durable and effective character. Certainly, it would not have produced the same veneer of collective punishment that generated true “rally ‘round the flag” tendencies among the population and within elite circles of Qatar. As matters stand, the choice of the sanctions used and the absence of adequate preparation to counter Qatar's response meant that the sanctions pressure was swiftly felt but also swiftly ameliorated, to Qatari advantage.

For this reason, as identified in the author's book, it is essential that sanctions design takes into account the nature of vulnerabilities and how a sanctions target—in this case, the Qatari population—is likely to react. It is probable that a sanctions campaign against Qatar would have prompted some popular backlash in any event. Targeting food, on the other hand, almost guaranteed it. Though countries may sanction any vulnerability, not all vulnerabilities are appropriate or satisfactory sources of leverage.



Imperative of International Cooperation

As noted above, the Saudis, Emiratis, and others did not do enough to prepare the international environment for their sanctions pitch. When they acted, much of the rest of the world was surprised, having not foreseen a major break between the Gulf states, or at least not one that would involve the substantial application of economic pressure. Such sanctions use is rare enough, particularly by states in the Middle East and utilizing the supply of food as a weapon. But perhaps more problematic was the absence of any commonly understood breach on Qatar's part that would seem to justify the application of such pressure and—consequently—a shared understanding of the imperative to apply it. Consequently, the Qataris quickly found alternative sources of needed commodities, especially with Turkey and Iran, but eventually with a much wider array of states.

Perhaps most damaging of all, the sanctioning powers did not secure the unambiguous support of the United States. This may be, in part, explained by the turbulent nature of the US government's own policy-making at the time, coming quickly after a presidential transition and with many key positions un-staffed. As contemporaneous press reports describe, there was considerable confusion within the US government as to what was occurring in the Persian Gulf and how the United States ought to respond and balance its various interests among the antagonists.⁴⁶ Subsequently, it became known that Jared Kushner, the president's son-in-law and advisor, did in fact know about the embargo but did not inform the State Department or others in the administration.⁴⁷ For this reason, it is hard to fault the Saudis and others for their probable sense that they had secured US buy-in or, at a minimum, acquiescence to the embargo. Even assuming the sanctioning states believed that they had secured some level of support prior to the embargo, the sanctioning states were unable to turn this top-level political attention into a firm commitment to support it and their policy priorities more generally.

Ultimately, this meant that when the Qataris began to evade the sanctions, the sanctioning states were not in a position to bring to bear the weight of the United States (and possibly US sanctions tools) in support of their initiative, much less convince other states to cooperate. They were also unwilling to follow through on their coincident threat to impose a “secondary boycott” on those who traded with Qatar, likely fearing the risks to their own economy⁴⁸; Saudi Arabia and the UAE have uttered but abandoned similar threats with respect to Iran, probably for the same reasons.

Altogether, this adds up to a general failure to secure international support for the initiative, which, given Qatar's wealth and evasion pathways, doomed the effort to obsolescence fairly early in the process. Other sanctions campaigns may have the same flaws, especially those entered into unilaterally and without a deep well of international support. It is for this reason that sanctions are often sought via the UN Security Council and other multilateral mechanisms and, even where this is not possible, sanctioning coalitions usually desire enforcing measures. The Qatar example shows that the right coalition—with an adequate number of states that have the ability to apply real leverage—remains a very valuable part of sanctions work.



Absence of Credible Off-ramps

Even if the United States and other potential partners had been fully apprised of what the Saudis, Emiratis, Egyptians, and Bahrainis had in mind, they probably would have asked searching questions about the end game for the sanctions campaign and the objectives that the sanctioners wished to obtain. Presumably, they could have expressed some interest in Qatar changing its foreign policy approach or assuaging concerns of its partners in the Arab Gulf countries with respect to its relations with problematic partners. But the fact that it took another month after the crisis began for the sanctioning parties to elucidate a complete list of demands undermined the diplomatic and political effects of the sanctions, reducing their value as a source of leverage and ultimately contributing to the ongoing stalemate.

Beyond that, the list that was eventually produced lacked seriousness, even if one allows for it to be characterized as “aspirational.” One might just as well have included a requirement of surrendering national sovereignty to the Gulf Cooperation Council or administration of the territory to the Saudi government. In fact, the demand of monthly audits comes very close to such a requirement.

Though there was a description of what might be necessary to relax sanctions, the list’s fundamental lack of credibility meant that it was quickly dismissed as a messaging ploy and not seen as remotely serious for the beginning of negotiations. This, in turn, strengthened the resolve of Qatar, which was committed, in any event, to resisting the pressure being applied by the sanctioning parties; now they could explain—with relative ease—that the Saudis and their partners were not serious in their negotiating approach.

More than anything, this underscores the degree to which “offers of diplomacy” are not in and of themselves useful if they are not seen as sophisticated and serious. The result was the prolonged conflict with Qatar that now appears to be resulting in a quiet diplomatic process in which Qatar may not make any real concessions to Saudi Arabia and its partners, especially with respect to the key issue of relations with Iran. Other sanctions cases have involved the same sort of flawed offers and to equal effect, as may presently be seen with the case of Iran.

Perils of Overreach

Taken in combination, the absence of a credible diplomatic approach, lack of preparation, and lack of support all led to a sanctions campaign that bit off far more than it could chew. The demands made of Qatar did not match the leverage being applied, but the sanctions did warn Qatar of the threats it faced from foreign economic coercion. A resident non-Qatari told the author that the Qataris did not remotely imagine that they could be subjected to the kind of economic pressure that the Saudis and their partners applied in June 2017. But, having been so attacked, they are resolved to not be subject to such pressure again in the future, and they have created sufficient flexibility, diversity, and reliability in their supply chains and business arrangements that it would be very difficult for a future sanctions campaign to generate much pressure on the country unless it took on a truly global character.

Though the sanctioners certainly did not set out to provide Qatar with a source of resilience, this was the result of their policy. Between planning for future contingencies with detailed



scenario work and actual physical reserves (especially of foodstuffs), Qatar is in a position in which it can weather future storms with relative ease. Moreover, Qatar now has the national confidence that it could manage under such circumstances, a psychological source of resolve that will stand it in good stead, should it face another such attack.

A similar lesson could potentially be applied in future cases with other targets: when choosing to impose sanctions, states must ensure that they have built into their policies an understanding of not only the short-term resistance options that exist, but also how a target could adapt to future attacks. A sanctions regime may not be able to attack the same target twice, especially if the first attack fails to as great a degree as appears to be the case with Qatar. For this reason, it is especially important that sanctioners ensure that they treat a decision to act as one that immediately forecloses future sanctions options, or at least one that requires a future assessment as to whether the identified vulnerabilities remain liable to pressure.



CONCLUSION

This paper does not offer an opinion on or assessment of the complaints articulated in defense of the sanctions effort mounted against Qatar by Saudi Arabia, the UAE, Egypt, and Bahrain. However, the Qatari sanctions episode shares many lessons about how to apply sanctions ineffectively. Applying pressure against Qatar in the way selected, with the tools selected, with the partners identified, and with the objectives articulated was unlikely to be successful, even when looked at with contemporaneous accounts. After the fact, it seems even more difficult to credit the campaign with the kind of sophisticated analysis and projection that would have guarded against policy failure; indeed, if sufficient analysis had been undertaken, it is likely that sanctions would not have been mounted in the first place.

More than anything, the Qatari example demonstrates the main lesson of most sanctions policy failures: the problems were less in the application of measures or their enforcement, and more in the underlying policy concepts that led to their misapplication. Policymakers around the world contemplating the use of sanctions would be well served to look at the Qatari sanctions episode as a cautionary tale, showing how an ill-formed policy can ultimately undermine even legitimate complaints and result in a situation that rewards the sanctioned party with greater resilience and capabilities. For this reason, sanctions should not be used unless subjected to rigorous planning and assessment—ironically of the sort that Qatar is now pursuing as a means of defeating potential future sanctions campaigns.



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