UDC 620.9:662.767(536.4)
Biblid: 0025-8555, 77(2025)
Vol. LXXVII, No. 1, pp. 91–111
DOI: https://doi.org/10.2298/MEDJP2501091V

Review article
Received 12. 12. 2024
Accepted 20. 02. 2025

LNG as a Geopolitical Tool: Qatar's Role in a Transforming Global Market

Stefano VALENTE[1]

Abstract: This paper examines Qatar's strategic international role, emphasising its use of liquefied natural gas (LNG) as both an economic driver and a geopolitical tool. It aims to analyse Qatar's energy strategies, particularly focusing on the role of LNG in enhancing the nation's geopolitical influence and ensuring its national security. The research question guiding this study is: Can Qatar effectively adapt to emerging trends, shifts, and transformations within the global energy market—particularly the energy transition—while safeguarding and consolidating its geopolitical position? The author employs the concept of the "rentier state" as a foundational framework for analysing economies heavily reliant on resource exports. The study's theoretical approach integrates insights from energy security, geopolitical strategy, and economic diversification. Methodologically, it utilises qualitative analysis of Qatar's energy policies, drawing on recent academic literature, statistical data, and policy reports. The conclusions of the paper point to the importance of economic diversification for Qatar's long-term strategic relevance.

Keywords: Energy security, geopolitical dynamics, Middle East, tribalism, energy transition.

Introduction

Over the centuries, powers such as Great Britain, Iran, Saudi Arabia, and, more recently, the United States have regarded Qatar as a key pawn in controlling the Persian Gulf due to its strategic location (Kéchichian 2001). Historically inhabited by non-sedentary nomadic tribal groups, Qatar's population falls into the category of a tribal society (Khouri and Kostner 1991). The persistence of a tribal structure

[1] Post-doctoral researcher, Department of Political Science, Sapienza University of Rome, Rome, Italy. E-mail: stefano.valente@uniroma1.it, ORCID: https://orcid.org/0009-0000-4654-1791.

in the socio-political sphere can be attributed to geographical and climatic factors. Following a geographically deterministic perspective, the non-sedentarization of a population stems directly from the characteristics of its territory. In the Persian Gulf countries—now fully integrated into global economic flows and experiencing high growth driven by hydrocarbon exports—clan-tribal traditionalism remains central to internal political dynamics and the legitimisation of power (Lizza 2011). Another key variable is the role of religion in shaping this socio-political structure (Maestri 2009). Islam functions as a social force, an "engine" of political identification, and a crucial instrument for legitimising political leadership (Fabietti 1997; Carré 1997). If the social life of an individual is defined by belonging to the Islamic umma, it is equally valid to speak of a dual—or even triple—identity: clan-tribal, religious, and national (Parolin 2007; Castro 1982). These aspects will be explored in more detail in the next section of the paper.

The supply of oil and natural gas plays a pivotal role in shaping Qatar's economic competitiveness, particularly amid global market uncertainties, price fluctuations, and associated risks. By leveraging its strategic geopolitical position and growing political influence, Qatar has successfully capitalised on the rising global demand for liquefied natural gas (LNG), establishing itself as a key player in the international energy arena. Through substantial investments in LNG infrastructure and the implementation of targeted energy policies, Qatar has emerged as a global leader in the LNG market. Nevertheless, challenges posed by energy market volatility and the global transition towards renewable energy underscore the necessity for Qatar to accelerate economic diversification and adopt robust strategies to sustain its geopolitical influence in the long term (IEA 2023). Qatar has been leveraging LNG not only as an economic driver but also as a geopolitical instrument. This study examines Qatar's energy strategies, with a specific emphasis on LNG's role in enhancing the nation's geopolitical influence and ensuring national security.

Given this context, the author poses the following research question: Can Qatar effectively adapt to emerging trends, shifts, and transformations in the global energy market—particularly the energy transition—while safeguarding and consolidating its geopolitical position? The concept of the rentier state serves as a foundational framework for analysing economies heavily reliant on resource exports. An outline of Qatar's contemporary economic and political developments is provided, considering its recent past and the role of energy as a driver of influence. The theoretical approach integrates insights from energy security, geopolitical strategy, and economic diversification. Methodologically, it employs qualitative analysis of Qatar's energy policies, drawing on recent academic literature, statistical data, and policy reports.

This paper consists of several sections. The next section examines the nature of political power in relation to Qatar's development as an independent state, with particular emphasis on local tribalism as a socio-political force. The study then explores LNG's role as an instrument of (geo)political power before addressing new geopolitical developments in the broader Middle Eastern region. The paper concludes with final remarks.

The interplay between tribalism, politics, and economics

The geographical characteristics of Qatar have always shaped the lifestyle and quality of life of its indigenous populations over the centuries (Fromherz 2012). Climatic conditions have encouraged tribal groups to isolate themselves, influencing the socio-political structure of the country. Isolation and clan-tribal fragmentation have played a decisive role in all historical phases of the country up to the present day (Endress 1994). With just 11,586 square kilometres, characterised almost entirely by desert expanses, Qatar has only around 2% of arable land and suffers from endemic water scarcity. The Qatari government continues to allocate significant funds for agricultural development, supporting programmes aimed at attracting leading companies in the sector. The absence of aquifers and the scarcity of usable water resources have hindered population settlement.

The relationship between Islam and tribalism is controversial and complex, given Islam's attempt to "incorporate" tribal logic within the framework of the Islamic umma, which geographically transcends limited boundaries (Filoramo 2003). The "Islamic-tribal paradigm" remains relevant: while Islamic society has adapted to modernity, the latter has not entirely disrupted traditional structures. Throughout the Persian Gulf and the Middle East, this paradigm remains a crucial instrument for legitimising power. The relationship between Islamic and tribal traditions continues to be central to Qatar's socio-political dynamics. Clan-tribalism should not be viewed solely as a source of power fragmentation and instability in countries where this form of identity is predominant, such as Yemen, Afghanistan, and Libya. Tribalism can also serve as a structural feature of a stable state. The formation of multiple centres of power linked to tribalism in a narrow geographical and identity sense can contribute to internal state equilibrium when a tribe or clan gains power by forging political agreements with other tribes. These agreements take various forms, including marriage alliances, wealth distribution, and expansion of tribal networks. All these elements are present in the Gulf countries (Anscombe 1997; Fabietti 1997).

The current dynamics shaping relationships among Qatar’s various family branches and its most influential tribes are rooted in a tribal framework, which serves as the cornerstone of the socio-political structure in the Persian Gulf emirate (Herb 1999) and a central identity reference and an instrument the central state leverages to legitimise its political power (Hourani 1998). The solidity and stability of the tribal pact that guarantees this legitimacy, along with that of the ruling Al Thani family, is linked to its network of alliances with the most influential tribes (Askari 2013a).

During the First World War, Abdallah bin Jassim Al Thani ratified a strategic alliance with Great Britain by entering Qatar into the Trucial System, effectively accepting the protectorate in exchange for British military protection. This agreement was opposed by some tribes, particularly those closest to the Saudis, who refused to recognise these choices. The resulting tensions within the Al Thani family stemmed from these divisions. In the 20th century, Britain, alarmed by the possibility of a direct Saudi annexation of Qatar, Bahrain, and the United Arab Emirates, sought by all means to weaken the tribal factions closest to the Saudis. At stake was the control of the newly independent Gulf states at Riyadh’s expense (Karpat 1982).

The economic sector is also significantly affected by these dynamics. In Qatar, tribal agreements between the Al Thani, Al Kulaifi, Al Dimmi, and Al Kuwari families remain fundamental, even today. Within these families, certain factions or branches wield greater influence than others and maintain ties with external sponsors—such as the historical connections of some families with the Saudis (Kéchichian 2008). However, Qatar’s independent policies, particularly its ambitious foreign policy choices, have fuelled tensions with the Saudis. The relationship with Saudi Arabia is, in this sense, fundamental to all balances in the Persian Gulf, encompassing both political and religious spheres (Ehteshami 2007). Since the late 19th century, a deep division has existed in the region between more traditionalist factions linked to the Wahhabi doctrine and more reformist power groups (Endress 1994), a division in which Saudi Arabia has played a central role. By the early 20th century, Qatar had also become a focal point of competing spheres of influence. For the Al Thani family, alignment with Wahhabi currents did not necessarily equate to political alignment with Riyadh. Qatar’s geographical proximity to Saudi Arabia fuelled concerns about maintaining genuine political independence—dynamics that continue to shape many of Qatar’s current policy choices (Fromherz 2012).

Whereas before the 1930s, Qatar’s geographical position made this small country strategically significant, the discovery of oil and, later, natural gas changed everything (Zahlan 1979). Before the discovery of energy resources, the region’s economy was centred purely on pearl exploitation, the primary source of livelihood. The pearl business followed a pyramid-like model, with a sheikh at the top owning a merchant fleet dedicated to pearl harvesting—a structure that reinforced a rigid social hierarchy. This dynamic was present throughout the Persian Gulf, from Bahrain to the present-day United Arab Emirates. However, in Qatar, the mercantile sector proved particularly vulnerable to the drop in demand caused by the global economic crisis of the 1930s. Pearls, a luxury good with no domestic market (as widespread wealth had not yet developed), relied entirely on exports. When foreign demand plummeted due to cyclical factors, especially during the 1940s, the Qatari economy was effectively deprived of its main source of income. The resulting economic recession led to significant emigration from the country. However, the Al Thani family remained in Qatar—historical circumstances that explain their political empowerment, rise, and subsequent concentration of immense wealth linked to energy rents (Fromherz 2012).

The consequences of the global economic recession of the 1930s, the onset of hydrocarbon extraction, and the absence of a merchant class are key variables in explaining Qatar's subsequent historical trajectory and the centralisation of power in the hands of the Al Thani (Crystal 1990). In this regard, "The only two important families of this community who decided to stay, the Al-Mani and the Darwish, never had any interest in opposing the Al Thani" (Maestri 2009, 96). Thus, the Al Thani remained the undisputed power in both political and economic spheres.

The discovery of oil primarily enabled Qatar to emerge from the crisis, with the Al Thani as the primary beneficiaries. After the Second World War, revenue from oil extraction began to reach significant levels. The resulting economic boom, driven by hydrocarbon exports, radically altered internal balances, including those within the royal family. That laid the foundation for a new political and economic structure that continues to shape Qatar today. For the Al Thani, the partial distribution of oil revenues, the allocation of government offices, and strategic marriages with other influential families were essential tools for consolidating power. However, internal tensions also arose, driven by increased demands from other tribes for a share of mining revenues—a latent competition that still defines Qatari politics. Additionally, the Islamic religion, in both its traditionalist and reformist variants, has played and continues to play a central role in legitimising political power and shaping Qatar's socio-political landscape (Kéchichian 2008, 193).

With the onset of intensive oil and gas extraction, external actors such as Anglo-American companies became key players, providing capital, technology, and expertise—creating the conditions for the sector's subsequent quantum leap. Foreign oil companies signed exclusive agreements with the sheikhs who owned the land where major oil and gas fields were located, effectively excluding the rest of the population.

Capital has begun to fill the state's coffers, and an economy based on hydrocarbon rents has permanently altered Qatar's internal balance. The vast offshore natural gas field North Field remains the central pillar of this wealth—a resource shared with neighbouring Iran, shaping their bilateral relations in a pragmatically cooperative manner. All gas and oil pipelines converge in eastern Qatar, where the country's main industrial hub is located.

Qatar exemplifies the rentier state model, an economic structure heavily reliant on resource exports with limited domestic production (Beblawi and Luciani 1987). This category describes a state whose economy is primarily sustained by the external sale of natural resources (Reiche 2010). Countries classified as rentier states, including those rich in oil, gas, or other raw materials, share key characteristics. According to Beblawi and Luciani (1987), these include:

- The predominance of rents in the country's economic structure;
- Economic dependence on external income, resulting in a weak domestic production sector;
- The exclusion of a significant portion of the population from direct participation in revenue-generating activities;
- The state's dominance as the sole direct beneficiary of export earnings.

Saudi Arabia, the United Arab Emirates, Kuwait, and Qatar all fit this model, possessing substantial oil and gas reserves and structuring their economies around resource exports (Metz 1994; Ngcayisa 2020; Zahlan 1989). A defining feature of such states is their centralised political structure, characterised by a concentration of power in the hands of a ruling elite that maintains strict control over the territory and population while suppressing internal dissent (Donini 1993). Additionally, the absence of taxation, extensive welfare programmes in health and education, and subsidies for basic necessities serve as key instruments for building and maintaining internal political consensus (Winckler 2000).

With few exceptions, there is a connection between the rentier state economic model and a civil society that is largely inactive and disengaged from political life. Another characteristic of rentier states is the strong presence of the state in the economy, reinforced by legislative measures that restrict foreign companies, often requiring them to enter into partnerships with local entities.

Another form of rent is *positional rent*—the strategic leasing of territory for foreign military bases. In the case of Qatar, this includes the US presence at Al Udeid Air Base (Blanchard 2014) and the Turkish military base at Tariq Bin Ziyad—operational since 2005. The economic centrality of oil and, especially, gas export revenues remains the defining feature of Qatar's economy. Despite efforts by the Al Thani family, the Emirate has not achieved economic diversification to the same extent as the United Arab Emirates, which has successfully expanded its tourism sector (Temporal 2011).

Economic theories have long highlighted the risks of overreliance on raw material exports. For instance, the Dutch Disease theory links high mining revenues to the decline of domestic manufacturing due to currency appreciation. This phenomenon makes domestically produced goods uncompetitive in international markets, creating structural vulnerabilities with significant geopolitical implications. As a result, Qatar's leadership—particularly the ruling family—has prioritised economic diversification and reduced dependence on gas exports. The underlying concern is that an overreliance on hydrocarbons, coupled with rapid but temporary economic growth, could lead to a decline in Qatar's economic and geopolitical influence in the future (Naso 2006).

Qatar's ambitions extend beyond economic influence to establishing itself as a political, economic, and cultural reference point across the Middle East. This objective aligns with its broader strategy of becoming a brand state, a concept that applies branding principles typically associated with corporations to nations:

> "Countries and sectors within countries are just like large companies. And, of course, like companies, they can be branded. Anything can be branded (…) However, national branding is not an easy matter. Although the revenues of certain companies are larger than the gross domestic product (GDP) of some countries, branding a country is far more complex in nature than branding a company" (Temporal 2011, 15).

All of Qatar's strategic choices in recent years are linked to this long-term vision, with natural gas serving as the primary instrument.

Qatar's tribal composition continues to shape power structures, reinforcing a strong centralisation of political authority. This dynamic is deeply intertwined with the concentration of wealth in the hands of a narrow elite, significantly influencing domestic and foreign policies—including energy strategies and geopolitical alignments. The Al Thani family plays a pivotal role within this system, exemplifying the rentier state model, particularly through the use of sovereign wealth funds (SWFs) linked to hydrocarbon revenues as tools for domestic political legitimacy. Across the Persian Gulf, SWFs function as critical instruments for maintaining economic stability and political continuity (Trudelle Montambault 2024). In Saudi Arabia, for example, the Public Investment Fund (PIF) is deployed to diversify the economy, attract foreign investments, and support the transition towards a more sustainable economic model. However, these funds remain fundamentally tied to hydrocarbon rents, reinforcing an economic system where political power exerts substantial control over financial resources, often sustaining patronage networks embedded in tribal structures.

While SWFs enhance the regime's resilience by ensuring the state's capacity for economic intervention and sustaining extensive welfare policies, their limitations in fostering long-term economic adaptability and competitiveness cannot be ignored. This economic dependency raises fundamental questions about the true feasibility of diversification efforts and the sustainability of Qatar, Saudi Arabia, and the United Arab Emirates in a global energy landscape where hydrocarbons are gradually losing dominance (Varvelli 2007).

The role of LNG as an instrument of power

While Qatar's oil reserves are moderate compared to those of its neighbours, it is among the world's largest natural gas exporters. Gas remains the cornerstone of Qatar's wealth, concentrated within a limited geographical area and a relatively small population. The backbone of this sector is *Qatar Gas*, established in 1984 and heavily financed throughout the 1990s. Following the rise of Hamad bin Khalifa Al Thani in 1995, the intensive exploitation of natural gas fields became a national priority. However, certain tribes—and even factions within the royal family—expressed concerns about this strategy, fearing over-dependence on foreign multinational corporations such as Total, Shell, and ExxonMobil. In response to these internal reservations, the Al Thani leadership sought to prevent foreign monopolies from dominating the energy sector, strategically integrating Japanese firms like Mitsui and Marubeni, which specialised in key extraction processes. The acquisition of Western technological expertise marked a pivotal shift in Qatar's economic and geopolitical trajectory. By the 1990s, this reliance on foreign entities extended beyond technology to include the capital required for expensive development initiatives. At the time, Qatar lacked the financial capacity it enjoys today, necessitating foreign investments to realise its ambitious energy projects. Against this backdrop of economic dependence, the Emirate successfully launched its first major natural gas initiative: *Qatar Gas 1*.

A key turning point for Qatar was its decision to invest in the more expensive but strategically independent LNG (liquefied natural gas) technology (Nash 2010). The Ras Laffan storage site, located about 50 kilometres north of Doha, alone received investments totalling approximately $70 billion (Ennasril 2013). Through the LNG process, natural gas is rapidly cooled, reducing its volume by up to 600 times and significantly enhancing its transportability and competitiveness compared to pipeline-based gas exports (Speight 2013). This transformation enables LNG to be shipped worldwide using specialised carriers, reaching re-gasification terminals in consumer markets. This flexibility proved decisive for Qatar's economic and geopolitical positioning. Despite its higher costs, global demand for LNG has consistently increased, particularly due to its strategic advantage in energy diversification. The war in Ukraine and Western sanctions on Russia have further heightened the demand for LNG as countries seek alternatives to Russian gas.

By embracing LNG, Qatar has strengthened its competitive edge in both regional and global energy markets (Clò 2000). Unlike pipeline-dependent exports, LNG shipments grant geopolitical independence, allowing Qatar to bypass territorial constraints—particularly potential control by Saudi Arabia if gas had been exported via land routes. This autonomy has enabled Doha to diversify its export destinations, securing long-term agreements with China, India, Japan, Southeast Asia, and Europe (Moschetta 2009). Meanwhile, despite sharing the massive South Pars–North Dome gas field with Qatar, Iran has struggled to fully capitalise on LNG exports due to Western sanctions, limiting its ability to compete in the global market.

Variables affecting the competitiveness of LNG stem from the complex liquefaction process, which relies on expensive refrigeration and maintenance technology (Stagnaro 2007). Additionally, LNG transport requires a specialised fleet of LNG carriers equipped with cryogenic tanks to maintain ultra-low temperatures. Once LNG reaches its destination, it must be re-gasified at facilities typically located near integrated port terminals. The entire infrastructure—spanning liquefaction, transport, and regasification—demands substantial investment for construction, operation, and maintenance. These multi-stage processes are highly energy-intensive, significantly increasing overall costs, whereas pipeline-transported natural gas benefits from a simpler, more direct infrastructure with relatively low operating costs. Consequently, LNG is generally more expensive. Price setting is influenced by global supply and demand dynamics (Carollo 2009; Di Benedetto 2001; Nicolazzi 2009). Market fluctuations, geopolitical tensions, and regional production and transportation costs can drive gas price volatility (Heinberg 2008; Li Vigni 2013). Additionally, since LNG can be shipped worldwide, its pricing tends to be more unpredictable, particularly as the industry shifts away from long-term supply contracts. This flexibility suits short-term energy needs for many countries but also contributes to greater price fluctuations. In both Asia and Europe, LNG spot prices can vary significantly due to market distortions caused by high-demand periods or energy crises.

Qatar has solidified its prominent role in the regional and international energy market through its central position in the GECF (Gas Exporting Countries Forum).

The GECF includes Algeria, Bolivia, Egypt, Equatorial Guinea, Iran, Libya, Nigeria, Qatar, Russia, Trinidad and Tobago, and Venezuela, collectively controlling 70% of the world's natural gas reserves and 85% of LNG production. Some members aim to transform the GECF into a gas cartel similar to OPEC, increasing its influence in global energy affairs as gas consumption rises. Additionally, Qatar is investing in GTL (gas-to-liquids) technology, a refining process that converts natural gas into synthetic fuels. The Shell-Qatar partnership, involving an $18 billion investment, has enabled the Ras Laffan facility to produce approximately 140,000 barrels of fuel per day, further strengthening Qatar's energy dominance.

Qatar's active participation in the Gas Exporting Countries Forum (GECF) and its strategic investments in Gas-to-Liquids (GTL) technologies have reinforced its leadership in the global energy market. However, its heavy reliance on LNG exports exposes the country to market volatility and the accelerating global transition to renewable energy (IRENA 2022; Wood 2024). To mitigate these risks, Qatar has prioritised comprehensive risk management strategies and a stronger emphasis on economic diversification. Recognising the risks of over-dependence on LNG, the government has introduced economic diversification policies under the Qatar National Vision 2030 (QNV2030). These initiatives focus on developing non-energy sectors, including tourism, finance, technology, and education. However, compared to other Gulf states, such as the United Arab Emirates, Qatar's progress in diversification has been relatively slower, emphasising the need for greater strategic investments and innovation to achieve sustainable growth.

Between 2000 and 2022, Qatar's GDP expanded from $18 billion to $236 billion, driven predominantly by the development of LNG and other energy-intensive industries. Yet, this economic model renders the country highly susceptible to fluctuations in fossil fuel prices and increasing international pressure to transition to sustainable energy sources. Despite notable efforts—including Qatar's commitment to the Paris Agreement (2016) and the launch of the National Climate Change Action Plan (NCCAP) in 2021—its economy remains deeply tied to fossil fuels. In response, Qatar has undertaken various mitigation strategies, such as investing in emission reduction technologies, improving energy efficiency, and promoting renewable energy adoption. Additionally, fostering non-hydrocarbon sectors is seen as a crucial strategy to reduce dependence on fossil fuel exports and enhance long-term economic resilience.

Geopolitical transformations in the Persian Gulf and the Middle East

In the 21st century, the Middle East remains at the centre of great tensions arising from numerous variables, including the role of energy resources and the political-religious fragmentation characterising this strategic chessboard (Bertolucci 2010; Foresta 1980). Religion and energy resources are key elements in a complex mosaic: "Over the years, Islam and oil have been the two principal forces shaping developments in the Persian Gulf and the broader Middle East. While Islam has been the foundation and scaffolding for some 1400 years, oil has been a relative newcomer in framing events in the region, with oil production initiated in Iran about 100 years ago, gaining global and regional significance after World War II, and capturing global headlines beginning in 1973-1974" (Askari 2013a, 15). The geopolitical dynamics of the Middle East is primarily shaped by the Shia-Sunni divide (Nyrop 2008).

This division and its political instrumentalisation remain highly relevant. The coexistence of these two religious groups in countries such as Lebanon, Iraq, Syria, Bahrain, Yemen, and, to some extent, Saudi Arabia explains key factors of regional instability. The Saudi case is particularly emblematic, as Riyadh is not just a regional power but also a significant political-religious reference in the Sunni world. The presence of Shiite minorities concentrated in the east of the country—moreover, near major oil fields—constitutes a strategic vulnerability, directly influencing Saudi foreign policy (Filoramo 2003).

Tensions have been exacerbated by the geopolitical meddling of external powers, which directly or indirectly exploit these divisions throughout the Middle East. In the Persian Gulf, it was precisely the opposition between Shiites and Sunnis and the perceived Iranian "threat" that led to the creation, in 1981, of the GCC (Gulf Cooperation Council), an organisation composed of Saudi Arabia, Bahrain, Qatar, the United Arab Emirates, Oman, and Kuwait (Ramazani 1988). The Arab-Islamic identity, social structures anchored to the tribal paradigm, and economic development primarily linked to the exploitation of gas and oil reserves are characteristics that united these states: "The search for some form of regional integration was indispensable for sustained economic growth, capable of counteracting, at least in part, the vulnerability arising from the very limited defence capabilities of each of the six countries and the potentially destabilising foreign threats of those years; the Islamic revolution in Iran (1979), the beginning of an intense activity by Tehran to "export" Khomeinist ideology, the Soviet invasion of Afghanistan (1979), and the outbreak of the Iran-Iraq war (1980) were perhaps the factors that most served as a stimulus to an institutionalisation of cooperation between the six Arab Gulf countries" (Maestri 2009, p. 2).

The GCC also had an economic dimension with the creation of the AEU (Unified Economic Agreement) in 1981, aimed at fostering economic integration among member states through the formation of a free trade area, the elimination of customs tariffs, the free movement of capital and citizens, and incentives for the creation of regional joint ventures. However, this regional initiative was a discontinuous process dependent on external stimuli. As Sadun Bordoni (2013, 134–135) explains: "[...] the new organisation was not and could not be conceived as a pure and simple 'economic community', but it also proposed itself as the institutionalisation of a whole series of historical, religious, social, tribal, and cultural ties, which could represent and, in fact, did represent a useful starting point for involving the local population in the 'psychology of cooperation', on the basis of a shared and common 'Gulf Arab identity' (al-huwiyyah al-khalijiyyah) and its strengthening. This latter aspect, moreover, was often seen by the Gulf Arab leaderships themselves as an indispensable parallel process to that of 'national identity building', which could not ignore the specific reality of state entities that emerged from tribal confederations, whose family/tribal ties were often cross-border and still took little account of the borders of modern territorialised states, re-proposing the centrality of ancient and deep-rooted solidarities".

Reading the geopolitics of the Middle East solely through the interpretative lens of the Shia-Sunni competition would be misleading. The reality is far more complex, characterised by strong geopolitical rivalries even within the Sunni galaxy: Turkey and Qatar on one side, Saudi Arabia, the United Arab Emirates, and Egypt on the other. These rivalries unfold within shifting alliances, where the positions of Israel and Iran and the influence of great powers such as the United States, Russia, and China also play significant roles. Foreign interference seeks to establish zones of control and influence, exploiting regional dynamics to serve its own strategic interests.

Qatar's unique geopolitical role stems primarily from its geographical position. The territorial waters where the vast gas field shared with Iran is located serve as a dividing line between the Shia and Sunni worlds. The Emirate's geopolitical dynamism has generated tensions with other regional countries, particularly Saudi Arabia, which has long sought to extend its sphere of influence throughout the Persian Gulf. Additionally, it is important to note that some key Qatari clans, tribes, and even factions within the Al Thani family have historically received political support from Riyadh (Askari 2013b, 100). Beyond these internal dynamics, Saudi Arabia has never fully accepted Qatar's independent foreign policy and the prominent role Doha has carved out for itself over time, largely by leveraging its vast LNG revenues.

Qatar's political activism has played a significant role in shaping major developments in the Middle East since 2009, particularly during the so-called Arab Spring (Della Ratta 2005). The country provided economic, political, and media support, with Al Jazeera playing a crucial role in shaping narratives (Cervi 2005; El-Nawawy and Iskander 2003; Valeriani 2010). However, it was Qatar's backing of the Egyptian Muslim Brotherhood, which briefly came to power in 2012, that proved most divisive (Kepel 2006; Campanini 2005). Doha's involvement in Egypt and the subsequent return of the Egyptian military to power represented the most significant defeat of its foreign policy and a major blow to the political credibility of Emir Hamad Al Thani (Colombo 2012). It would not be entirely inaccurate to view Hamad bin Khalifa Al Thani's abdication in favour of his young son, Tamim, as a direct consequence of this setback. The fall of Morsi and the Egyptian Muslim Brotherhood relegated Qatar to a position of partial diplomatic isolation, as other GCC states had always regarded this alliance with suspicion due to the ideological stance of the Egyptian Muslim Brotherhood (Kepel 2001).

In Syria, during the civil war that has pitted the Alawites (a Shia faction in power since 1971) against various Sunni factions since 2012, Qatar's position diverged from that of other Sunni Gulf countries. Doha financially supported Sunni insurgents opposed to Bashar al-Assad's regime, particularly the Muslim Brotherhood-dominated National Coalition, only to see this faction marginalised due to its adoption of more extremist and radical positions.[2] Saudi Arabia, in contrast, did not support the same Sunni faction. Qatar's attempt to carve out its identity and geopolitical distinctiveness in the Persian Gulf and the broader Middle East has faced multiple setbacks and failures. Perhaps its greatest miscalculation was its overexposure to complex regional dynamics that often produced unpredictable outcomes (Davis 2013). This exposure culminated in a four-year political-diplomatic crisis with other GCC member states, particularly Saudi Arabia. At one point, Doha seriously feared a potential Saudi military attack. This concern prompted Qatar to strengthen its alliance with Erdogan's Turkey, which offered military protection in exchange for financial support. This realignment led to the formation of two opposing factions within the Sunni world, a division that still shapes the current balance of power in the Middle East.

[2] Meanwhile, in December 2024, government changes occurred in Syria, resulting, among other things, in the exile of the former president, Bashar al-Assad.

Qatar's role as a broker—including the controversy over its past hosting of Taliban and Hamas leaders—has allowed Emir Tamim Al Thani to secure a level of geopolitical influence far beyond the country's small size (Gulbrandsen 2007). Maintaining strategic ties with both Iran and Russia while simultaneously hosting the US Central Command in the Persian Gulf is a key element of this balancing act. Qatar's mediation efforts in both the Russo-Ukrainian war and the war between Israel and Hamas represent significant political-diplomatic achievements. These successes were primarily made possible by the country's economic leverage, derived from its energy exports (Macciò 2005; Varvelli 2008). The global demand for LNG, particularly heightened after the outbreak of the war in Ukraine and subsequent Western sanctions on Moscow, has further reinforced Qatar's strategic position (IEA 2023). However, despite its efforts in various sectors, Qatar remains heavily dependent on natural gas exports and the revenues they generate. Its political and geopolitical influence in the coming decades will remain closely tied to the significance and price trends of this critical resource.

Conclusion

Several factors suggest continued volatility in natural gas prices. In the short term, prices are expected to remain relatively stable due to high inventory levels and increased production and storage capacity, particularly in the US and Europe. A balanced supply-demand dynamic should help contain prices, barring unforeseen events. From 2025 onwards, prices are projected to rise gradually, driven by increasing demand from electrification and the energy transition, alongside potential supply shortages if new LNG projects fail to meet the rising demand (IRENA 2024). Extreme weather events, infrastructure disruptions, and geopolitical tensions could trigger price spikes, while long-term energy policies—especially in Europe's decarbonisation efforts—add further uncertainty (IRENA 2023a). LNG remains a crucial part of the global energy mix, with its future shaped by geopolitical, economic, and technological factors. According to the IEA World Energy Outlook 2024 (IEA 2024), LNG demand has surged over the past two decades, particularly in Asia and Europe, where it enhances energy security and diversifies supply. Key importers such as China, Japan, South Korea, and European nations increasingly rely on LNG, especially after recent geopolitical disruptions.

Reports such as IRENA's *Global Renewables Outlook* (IRENA 2024) and IEA's *Net Zero by 2050* (IEA 2021) project continued LNG demand growth in the near term, particularly in emerging economies across Asia, Africa, and Latin America.

These regions view LNG as a cleaner alternative to coal and oil, especially for electricity generation and industry. Asia will remain the largest LNG market, driven by China, India, and Southeast Asia. According to the World Energy Outlook 2024 (IEA 2024), China is set to surpass Japan as the world's top LNG importer by 2030, fuelled by urbanisation, industrialisation, and coal-to-gas transition policies. Meanwhile, Europe's LNG demand has surged as it reduces reliance on Russian pipeline gas. However, its long-term role remains uncertain amid accelerating renewable energy deployment under the EU's Green Deal. Despite short-term growth, LNG's long-term outlook faces challenges. The global push for net-zero emissions prioritises renewables and green hydrogen over natural gas. High infrastructure costs, including regasification and storage, remain a barrier for many developing nations. LNG's economic viability is also threatened as renewable energy and battery storage costs continue to fall. Additionally, LNG markets remain highly sensitive to geopolitical tensions, as seen with price spikes during the Russia-Ukraine conflict. Ensuring stable supply chains will require investment in diversified export capacities, led by the US and Qatar. Environmental concerns, particularly methane leakage during production and transport, have intensified scrutiny. Addressing these issues through improved technologies and stricter regulations is crucial for LNG's sustainability.

Despite these challenges, LNG may retain a role in the evolving energy landscape. Integrating carbon capture, utilisation, and storage (CCUS) with LNG infrastructure could reduce its emissions and extend its viability. LNG will remain a critical backup fuel for regions facing intermittent renewable energy supply. However, its future reflects a complex balance of competing trends. While short-term demand remains strong, particularly in emerging markets, the global shift towards renewables and stricter climate policies will likely limit long-term growth. LNG's ability to adapt through decarbonisation, technological innovation, and resilience will shape its future role. These factors will also influence Qatar's geopolitical standing. Uncertainty in the international energy market directly affects power dynamics in the Persian Gulf and Qatar's foreign policy (Rubin 2009). Situated near the Sunni-Shia divide, with Iran as the main Shiite power, Qatar has strategically leveraged its energy wealth to secure a central role in the Middle East. This activism, enabled by the political use of natural gas, serves two key objectives: legitimising the Al Thani ruling family and expanding Qatar's influence across the Middle East and North Africa. Since the early 2000s, Qatar's foreign policy exposure, its brand-state strategy (Temporal 2011), and Al Jazeera's influence have positioned it at the heart of regional transformations, often turbulent ones. The recent developments in Syria, including the fall of the Alawite Assad regime, are part of this broader geopolitical landscape. Qatar's main instrument of influence remains natural gas, particularly LNG, which provides a strategic advantage. Unlike piped gas, LNG can be shipped globally, reducing Qatar's dependence on its Saudi neighbour and reinforcing its autonomy in international energy markets.

Support for the Egyptian Muslim Brotherhood marked a turning point in Qatar's foreign policy. Backing a faction that promoted an alternative political model—viewed negatively, particularly by Saudi Arabia and the UAE—deepened divisions within the Gulf Cooperation Council (GCC), comprising the main Sunni states of the Persian Gulf (Saudi Arabia, Bahrain, Qatar, the UAE, Oman, and Kuwait). This political-diplomatic tension triggered a prolonged crisis between Riyadh and Doha, leading to a polarisation of geopolitical alliances within the Sunni world: Turkey and Qatar on one side, Saudi Arabia, the UAE, and Egypt on the other. The closer ties between Qatar and Turkey—including Ankara's military base in Qatar—stem from pragmatism and mutual interests. Turkey provides military protection, while Doha offers investment and capital to support Ankara's struggling economy, often beset by macroeconomic imbalances, including inflation and currency devaluation.

Qatar's foreign policy, anchored in natural gas exports and associated revenues, faces long-term sustainability challenges. The key uncertainty is how viable this model remains as the global energy transition advances, gradually reducing reliance on oil and gas. While these resources will remain central to the energy mix for decades, their marginalisation could economically and politically weaken states like Qatar, which depend heavily on hydrocarbon exports. The energy market's complexity defies simple supply-and-demand models, as multiple interrelated markets—commodities, finished products, and financial instruments (e.g., futures)—operate with distinct dynamics. No single actor can dictate price developments, making energy markets highly unpredictable. Qatar remains deeply entangled in these shifting dynamics despite efforts by the Al Thani family to diversify the economy. The post-Ukraine war surge in demand for "non-Russian" LNG has benefitted Qatar, but the evolving geopolitical and energy landscape presents long-term risks. While LNG has bolstered Qatar's economic and geopolitical standing, the accelerating energy transition underscores the urgency of economic diversification to maintain strategic relevance.

Bibliography

Anscombe, Frederick F. 1997. *The Ottoman Gulf: The Creation of Kuwait, Saudi Arabia and Qatar*. New York: Columbia University Press.

Askari, Hossein. 2013a. *Collaborative Colonialism: The Political Economy of Oil in the Persian Gulf*. New York: Palgrave Macmillan.

Askari, Hossein. 2013b. *Conflicts in the Persian Gulf: Origins and Evolution*. New York: Palgrave Macmillan.

Bertolucci, Bruno. 2010. *La via del petrolio*. Milano: Feltrinelli.

Blanchard, Christopher M. 2014. *Qatar: Background and U.S. Relations*. Congressional Research Service. November 4. https://sgp.fas.org/crs/mideast/RL31718.pdf.

BP. 2023. *Statistical Review of World Energy 2023.* https://www.bp.com/statisticalreview.

Campanini, Massimo. 2005. *Il pensiero islamico contemporaneo*. Bologna: Il Mulino.

Carollo, Stefano. 2009. *C'era una volta il prezzo del petrolio*. Milano: Libri Scheiwiller.

Carré, Olivier. 1997. *Islam laico*. Bologna: Il Mulino.

Castro, Francesco. 1982. *Lezioni di diritto musulmano*. Venezia: Marsilio.

Cervi, Alessandro. 2005. *Al Jazeera e la rivoluzione dei media arabi*. Palermo: Sellerio.

Clò, Alberto. 2000. *Economia e politica del petrolio*. Bologna: Compositori.

Colombo, Silvia. 2012. *The GCC Countries and the Arab Spring: Between Outreach, Patronage and Repression*. IAI Working Papers, No. 12/09. https://www.iai.it/sites/default/files/iaiwp1209.pdf.

Crystal, Jill. 1990. *Oil and Politics in the Gulf: Rulers and Merchants in Kuwait and Qatar*. Cambridge: Cambridge University Press.

Davis, John. 2013. *The Arab Spring and Arab Thaw: Unfinished Revolutions and the Quest for Democracy*. New York: Routledge.

Della Ratta, Donatella. 2005. *Al Jazeera, media e società arabe nel nuovo millennio*. Milano: Bruno Mondadori.

Di Benedetto, Francesco. 2001. *I mercati del petrolio e la loro volatilità*. Milano: Franco Angeli Edizioni.

Donini, Pier Giovanni. 1993. "Islam e autoritarismi". *Oriente Moderno* 12 (73): 57–72.

Ehteshami, Anoushiravan. 2007. *Globalization and Geopolitics in the Middle East: Old Games, New Rules*. London: Routledge.

El-Nawawy, Mohammed, and Adel Iskander. 2003. *Al-Jazeera: The Story of the Network that is Rattling Governments and Redefining Modern Journalism*. Boulder: Westview Press.

Endress, Gerhard. 1994. *Introduzione alla storia del mondo musulmano*. Venezia: Marsilio.

Ennasril, Nabil. 2013. *L'énigme du Qatar*. Paris: Armand Colin.

Fabietti, Ugo. 1997. *Etnografia della frontiera*. Roma: Meltemi Editore.

Filoramo, Giovanni. 2003. *Islam*. Roma-Bari: Laterza.

Foresta, Martin F. 1980. *Il petrolio: Il passato, il presente, l'imprevedibile futuro*. Milano: Mondadori.

Fromherz, Allen J. 2012. *Qatar: A Modern History*. Washington, D.C.: Georgetown University Press.

Gulbrandsen, Anders. 2007. *Bridging the Gulf: Qatari Business Diplomacy and Conflict Mediation*. Washington, D.C.: Georgetown University.

Beblawi, Hazem, and Giacomo Luciani. 1987. *The Rentier State: Nation, State and Integration in the Arab World*, vol. 2. London: Routledge.

Heinberg, Richard. 2008. *Senza petrolio: Il protocollo per evitare le guerre, il terrorismo e il collasso economico*. Roma: Fazi.

Herb, Michael. 1999. *All in the Family: Absolutism, Revolution and Democracy in the Middle Eastern Monarchies*. New York: State University of New York Press.

Hourani, Albert. 1998. *Storia dei popoli arabi*. Milano: Mondadori.

[IEA] International Energy Agency. 2024. *World Energy Outlook 2024*. October 16. https://www.iea.org/reports/world-energy-outlook-2024.

[IEA] International Energy Agency. 2023. *World Energy Outlook 2023*. October 24. https://www.iea.org/reports/world-energy-outlook-2023.

[IEA] International Energy Agency. 2021. *Net Zero by 2050: A Roadmap for the Global Energy Sector.* May 18. https://www.iea.org/reports/net-zero-by-2050.

[IRENA] International Renewable Energy Agency. 2020. *Global Renewables Outlook: Energy Transformation 2050.* https://energiewende-global.com/wp-content/uploads/2023/05/Global_Renewables_Outlook_2020.pdf.

[IRENA] International Renewable Energy Agency. 2023a. *World Energy Transitions Outlook 2023: 1.5°C Pathway.* June. https://www.irena.org/Publications/2023/Jun/World-Energy-Transitions-Outlook-2023.

[IRENA] International Renewable Energy Agency. 2023b. *Renewable Capacity Statistics 2023.* March. https://www.irena.org/Publications/2023/Mar/Renewable-capacity-statistics-2023.

[IRENA] International Renewable Energy Agency. 2022. *Renewable Energy Statistics 2022.* July 7. https://www.irena.org/publications/2022/Jul/Renewable-Energy-Statistics-2022.

Wood, Johnny. 2024. “Renewables Energy Capacity and Demand Growth”. *World Economic Forum.* February 8. https://www.weforum.org/stories/2024/02/renewables-energy-capacity-demand-growth/.

Karpat, Kemal H. 1982. *Political and Social Thought in the Contemporary Middle East*. London: Praeger Publishers.

Kéchichian, Joseph A. 2001. *Iran, Iraq and the Arab Gulf States*. New York: Palgrave.

Kéchichian, Joseph A. 2008. *Power and Succession in Arab Monarchies: A Reference Guide*. Boulder, CO: Lynne Rienner Publishers.

Kepel, Gilles. 2001. *Jihad: Ascesa e declino. Storia del fondamentalismo islamico*. Roma: Carocci.

Kepel, Gilles. 2006. *Il profeta e il faraone: I Fratelli Musulmani alle origini del movimento islamista*. Roma-Bari: Laterza.

Khouri, Philip S., and Joseph Kostner. 1991. *Tribes and State Formation in the Middle East*. Berkeley: University of California Press.

Li Vigni, Benedetto. 2013. *Il grande gioco del petrolio: Affari, politica, guerre*. Milano: Mursia.

Lizza, Gianfranco. 2011. *Geopolitica delle prossime sfide*. Torino: Utet.

Macciò, Massimo. 2005. *Islam e petrolio: L’intricato nodo mediorientale*. Roma: Rubettino.

Maestri, Ettore. 2009. *La regione del Gulf Cooperation Council (GCC)*. Milano: Franco Angeli.

Metz, Helen C. 1994. *Persian Gulf States: Country Studies*. 3rd ed. Washington, D.C.: Federal Research Division, Library of Congress.

Trudelle Montambault, Alexis. 2024. “Tools of Regime Stability: The Political Economy of Sovereign Wealth Funds in Gulf Rentier States”. *Review of International Political Economy* 31 (5): 1446–1471. DOI: https://doi.org/10.1080/09692290.2024.2325394.

Moschetta, Tiziana Maria. 2009. *Il mercato comunitario del gas naturale: Investimenti esteri diretti e diritto internazionale*. Milano: Giuffrè.

Nash, Katelyn M. 2010. *Shale Gas Development*. New York: Nova Science Publishers.

Naso, Vittorio. 2006. *La società no oil: Un nuovo sviluppo è possibile, ma senza petrolio*. Milano: Orme.

Ngcayisa, Lumanyano. 2020. “Rentierism: The Case of Qatar”. *Middle East Tracker* 1 (5): 1–50.

Nicolazzi, Marco. 2009. *Il prezzo del petrolio*. Milano: Boroli.

Nyrop, Richard F. 2008. *Area Handbook for the Persian Gulf States*. Wildside Press.

Parolin, Gianluca P. 2007. *Dimensioni dell’appartenenza e cittadinanza nel mondo arabo*. Napoli: Jovene Editore.

Ramazani, Rouhollah K. 1988. *The Gulf Cooperation Council: Record and Analysis*. Charlottesville: University Press of Virginia.

Reiche, Danyel. 2010. “Energy Policies of Gulf Cooperation Council (GCC) Countries – Possibilities and Limitations of Ecological Modernization in Rentier States”. *Energy Policy* 38 (5): 2395–2403.

Rubin, Jeffrey. 2009. *Why Your World Is About to Get a Whole Lot Smaller: Oil and the End of Globalization*. Toronto: Random House Canada.

Sadun Bordoni, Giuliana. 2013. *Il Mediterraneo dopo la primavera araba*. Roma: Edizioni Nuova Cultura.

Speight, James G. 2013. *Shale Gas Production Processes*. Oxford: Gulf Professional Publishing.

Stagnaro, Carlo. 2007. *Sicurezza energetica: Petrolio e gas tra mercato, ambiente e geopolitica*. Soveria Mannelli: Rubbettino.

Temporal, Paul. 2011. *Islamic Branding and Marketing*. Singapore: John Wiley & Sons.

Valeriani, Augusto. 2010. *Effetto Al Jazeera: Transnazionalismo e ibridizzazioni nei sistemi del giornalismo arabo contemporaneo*. Bologna: Emil di Odoya.

Varvelli, Riccardo. 2007. *Petrolio e dopo? Contro le false tesi sulla fine dell’oro nero*. Milano: RCS Libri, Etas.

Varvelli, Riccardo. 2008. *Le energie del futuro: Carbone, nucleare o energie verdi?* Milano: RCS Libri, Etas.

Winckler, Onn. 2000. *Population, Growth, Migration and Socio-Demographic Policies in Qatar*. Tel Aviv: The Moshe Dayan Center for Middle Eastern and African Studies, Tel Aviv University.

Zahlan, Rosemarie Said. 1979. *The Creation of Qatar*. London: Croom Helm.

Zahlan, Rosemarie Said. 1989. *The Making of the Modern Gulf States: Kuwait, Bahrain, Qatar, the United Arab Emirates and Oman*. London: Unwin Hyman.

Stefano VALENTE

**TEČNI PRIRODNI GAS KAO GEOPOLITIČKI ALAT:
ULOGA KATARA U PREOBRAŽAVAJUĆEM GLOBALNOM TRŽIŠTU**

Apstrakt: Ovaj rad istražuje stratešku međunarodnu ulogu Katara, sa posebnim naglaskom na korišćenje tečnog prirodnog gasa (LNG) kao ekonomskog pokretača i geopolitičkog instrumenta. Cilj je da se analizira energetska strategija Katara, s posebnim osvrtom na ulogu LNG-a u jačanju geopolitičkog uticaja i očuvanju nacionalne bezbednosti. Istraživačko pitanje glasi: Može li Katar efikasno da se prilagodi novim trendovima, promenama i transformacijama u globalnom energetskom tržištu—posebno energetskoj tranziciji—dok istovremeno učvršćuje svoju geopolitičku poziciju? Autor koristi koncept "rentijerske države" kao osnovni okvir za analizuprivreda koje se u velikoj meri oslanjaju na izvoz resursa. Teorijski pristup studije integriše doprinose iz oblasti energetske bezbednosti, geopolitičke strategije i ekonomske diversifikacije. U metodološkom smislu, rad primenjuje kvalitativnu analizu energetske politike Katara, oslanjajući se na savremenu akademsku literaturu, statističke podatke i političke izveštaje. Zaključci rada upućuju na značaj ekonomske diversifikacije za dugoročnu stratešku relevantnost Katara.

Ključne reči: Energetska bezbednost, geopolitička dinamika, Bliski istok, tribalizam, energetska tranzicija.