



The Arab Gulf States Institute in Washington

Building bridges of understanding

ANNUAL REPORT 2018





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CHAIR'S WELCOME



A Message from AGSIW Board Chair Ambassador Frank G. Wisner

The past year was an unusually turbulent one for the Gulf Arab states, and for their relations with the United States. From a sharp uptick in concern over the humanitarian crisis caused by the war in Yemen, to the murder of Saudi journalist Jamal Khashoggi, to uncertainty regarding the viability of the Gulf Cooperation Council itself, events forced a broad reassessment of long-held assumptions about key regional partners, and how to best ensure continued progress on shared strategic interests.

Moments such as these place a premium on informed and timely analysis of the long-term implications of day-to-day events. Throughout the course of the year, the Arab Gulf States Institute in Washington rose to meet this challenge and, in doing so, demonstrated why it has earned the trust of policymakers, business leaders, journalists, and others who look to AGSIW to inform the judgments they are asked to make when the discussion turns to this critically important corner of the globe.

The excellent work of AGSIW is made possible by the generous support of our donors and corporate sponsors. The ability to connect the dots that link seemingly unrelated events and discern long-term trends from the patterns that begin to emerge is a collective endeavor on the part of AGSIW's dedicated staff, which includes recognized scholars, former diplomats, and professionals from a variety of backgrounds. I thank each of our donors for the invaluable role they play in enabling AGSIW to achieve its mission, and I encourage anyone reading this report with the capacity to join our corporate membership circles to do so, in order to ensure that the important work of AGSIW continues unimpeded well into the future.

Sincerely,

A handwritten signature in black ink that reads "Frank G. Wisner". The signature is written in a cursive, flowing style.

PRESIDENT'S MESSAGE



A Message from AGSIW President Ambassador Marcelle M. Wahba

I'm deeply grateful to work with, and learn from, an extraordinary group of colleagues at AGSIW and to benefit from the leadership of a remarkable board of directors. Their collective contributions allow AGSIW to continue to be the go-to source for an analytical understanding of the long-term trends and historic transformations taking place in the Middle East with particular attention to the geostrategic region of the Gulf Arab countries.

During these unsettled times, our mission is ever more essential to provide the foreign affairs and business community with nuanced, in-depth analysis that can serve as the foundation upon which long-term strategic decisions can be made and successful relationships can be built. The Gulf Arab states are playing increasingly influential roles and employing a variety of tools to act in support of their key national interests, from economic and humanitarian assistance to diplomatic and military interventions. Their influence today extends well beyond the Middle East, as they build and expand relationships and alliances in Asia, Africa, Europe, and Latin America. Therefore, AGSIW will continue to cover the most salient issues shaping the Gulf Arab states at the country-specific level, as well as their regional and global engagement.

I am pleased to report that AGSIW's Corporate Circle memberships, grants, and event sponsorships increased in 2018, which allowed us to broaden our programming and expand our research. In the pages of this report, you will find additional information on the benefits associated with membership and other opportunities to partner with AGSIW.

My thanks and appreciation to our community of friends and colleagues from around the world who read our publications, attend our programs, and support our work.

Sincerely,

A handwritten signature in black ink, appearing to read 'Marcelle Wahba', written in a cursive style.

ABOUT

The Arab Gulf States Institute in Washington (AGSIW), launched in 2015, is an independent, nonprofit institution dedicated to providing expert research and analysis of the social, economic, and political dimensions of the Gulf Arab states and how they impact domestic and foreign policy. AGSIW focuses on issues ranging from politics and security to economics, trade, and business; from social dynamics to civil society and culture. Through programs, publications, and scholarly exchanges the institute seeks to encourage thoughtful debate and inform the U.S. policy community regarding this critical geostrategic region.

Overall direction and supervision of AGSIW resides solely with the institute's **Board of Directors**.

Abdel Monem Said Aly, PhD, Founding Director and Honorary Chair; Chairman/CEO, Regional Center for Strategic Studies in Cairo

Ambassador Frank G. Wisner, Chair of the Board; Foreign Affairs Advisor, Squire Patton Boggs

Fatima Al-Shamsi, PhD, Vice Chair of the Board; Deputy Vice Chancellor of Administrative Affairs of Paris-Sorbonne University Abu Dhabi

Khaled Sifri, Treasurer of the Board; Chief Executive Officer, Emirates Investment Bank

Ambassador Marcelle M. Wahba, President, Arab Gulf States Institute in Washington

Mohammed Al Ardhi, Executive Chairman, Investcorp

Yousef Al-Ebraheem, PhD, Chairman, Investcorp; Advisor, Diwan of the Emir of Kuwait

F. Gregory Gause, III, PhD, John H. Lindsey '44 Chair and Head of the International Affairs Department, Texas A&M University

Ambassador Edward W. Gnehm, Jr., Vice Dean, Elliott School of International Affairs, George Washington University

Nabil Habayeb, Chief Executive Officer, GE in the Middle East, North Africa, and Turkey

Bernard Haykel, PhD, Director, Institute for Transregional Study of the Contemporary Middle East, North Africa and Central Asia, Princeton University

Fatima Al Jaber, Chief Operating Officer, Al Jaber Group, Abu Dhabi

Ebtesam Al-Ketbi, PhD, Founder and President, Emirates Policy Center, Abu Dhabi

Ibrahim Al-Muhanna, PhD, Founder, Saudi Energy Consultants

Ambassador Thomas Pickering, Vice Chairman, Hills & Company

George R. Salem, Strategic Advisor, DLA Piper

2018 AGSIW Themes

Regional and International Security

In Focus

- Iran
- Saudi Arabia
- Yemen
- Gulf Rising *Series*

Gulf Societies in Transition

Changing Economic Dynamics

Arts and Culture

REGIONAL AND INTERNATIONAL SECURITY

Shake-Up in the Middle East: How Will Regional Powers Respond? | Event

AGSIW hosted a panel analyzing the implications of the U.S. withdrawal from the Joint Comprehensive Plan of Action, the 2018 elections in Iraq and Lebanon, hostilities between Iran and Israel over Syria, and other major developments for the Gulf Arab countries and the region.

Kuwait: Finding Balance in a Maximalist Gulf | Publication

Senior Resident Scholar Kristin Smith Diwan examined Kuwait's search for balance among its social groups, political institutions, and regional powers, and asked if Kuwait's model is sustainable in a Gulf security and political environment characterized by maximalism.

Roundtable with H.E. Abdel Aziz Aluwaisheg | Event

Abdel Aziz Aluwaisheg, assistant secretary-general for political and negotiation affairs for the Gulf Cooperation Council, discussed U.S.-GCC relations and recent developments in the region.

A Conversation with H.E. Reem Al Hashimy | Event

AGSIW hosted a roundtable with Reem Al Hashimy, minister of state for international cooperation of the UAE. Hashimy focused on the UAE's role in the conflict in Yemen and provided the UAE's perspective on the historic reconciliation reached between Ethiopia and Eritrea.

Shia Foreign Fighters and Regional Security | Publication Series

This series by Senior Fellow Ali Alfoneh examined the role of Iranian-backed Shia foreign fighters and their potential impact on regional security dynamics.

Searching for a Remedy to Violent Extremism | Event

Seamus Hughes, deputy director of the George Washington University's Program on Extremism, and Maqsoud Kruse, executive director of Hedayah, discussed the challenges facing programs on countering violent extremism and ways to strengthen CVE initiatives.

Poor Governance, Corruption Spur Iraqi Protests | Publication

Non-Resident Fellow Ambassador Feisal Amin Rasoul al-Istrabadi discussed the causes and implications of the 2018 protests in southern Iraq.

Media and Outreach

AGSIW President Ambassador Marcelle M. Wahba commented on U.S. efforts to mediate the GCC dispute with several media outlets, including Reuters, The National, and Al Arabiya.

Shake-Up in the Middle East: How Will Regional Powers Respond?



(From left) Senior Resident Scholar Hussein Ibish (moderator); AGSIW Board Member F. Gregory Gause, III; Gonul Tol, founding director, Center for Turkish Studies, Middle East Institute; Non-Resident Fellow Ambassador Feisal Amin Rasoul al-Istrabadi

A Conversation with H.E. Reem Al Hashimy



Reem Al Hashimy, UAE minister of state for international cooperation

Roundtable with H.E. Abdel Aziz Aluwaisheg



Abdel Aziz Aluwaisheg, left, assistant secretary-general for political and negotiation affairs for the Gulf Cooperation Council, and AGSIW President Ambassador Marcelle M. Wahba

Searching for a Remedy to Violent Extremism



Seamus Hughes, left, deputy director of the George Washington University's Program on Extremism; Maqsood Kruse, center, executive director of Hedayah; and Executive Vice President Ambassador Stephen A. Seche

IRAN IN FOCUS

Gulf Dynamics after the JCPOA | Event

AGSIW hosted a conversation with AGSIW Board Member Thomas Pickering and Non-Resident Fellow Abdulkhaleq Abdulla on the implications for the Gulf Arab states of the Trump administration's decision to withdraw from the Joint Comprehensive Plan of Action.

The War in Syria is Transforming the IRGC into an Expeditionary Force | Publication

Senior Fellow Ali Alfoneh analyzed the implications of the Islamic Revolutionary Guard Corps' transformation into an expeditionary force for the United States and its allies in the Middle East.

Tougher U.S. Policies on Iran Reassure Gulf Arab Allies | Publication

Senior Resident Scholar Hussein Ibish analyzed the Gulf Arab states' views on the Trump administration's tougher approaches toward Iran.

Unwinding the JCPOA Opens Doors for China and Amplifies Risk in the Gulf | Publication

Former Senior Resident Scholar Karen E. Young discussed the multidimensional consequences of the U.S. withdrawal from the JCPOA.

Iran's Rising Unemployment Crisis | Publication

Sara Bazoobandi, managing director of Middle East Risk Consulting, analyzed Iran's increasingly tight job market and sociopolitical dissatisfaction.

Maximum Pressure: Are Trump's Middle East Policies Starting to Yield Results? | Event

AGSIW hosted Raghida Dergham, founder and executive chairman of the Beirut Institute, and Andrew Peek, deputy assistant secretary of state for Iraq and Iran in the Bureau of Near Eastern Affairs at the U.S. Department of State, for a conversation analyzing developments in U.S. Middle East policy.

What to Make of Trump's Exit from the JCPOA | Video

A week after President Donald J. Trump's announcement that the United States would withdraw from the Iran nuclear deal, AGSIW's senior resident scholars discussed Trump's decision, and its regional and global implications.

Back to Sanctions: How Will Iran Balance Regional Ambitions and Domestic Stability? | Event

Ali Alfoneh, Bessma Momani, senior fellow at the Centre for International Governance Innovation, and Seyed Hossein Mousavian, policy specialist at Princeton University's Program on Science and Global Security, examined the Trump administration's reimposition of sanctions on Iran.

Media and Outreach

Ali Alfoneh discussed Iranian political dynamics and international relations for The Arab Weekly, Al Hurra, Radio Farda, Haaretz, and Albawaba.

Gulf Dynamics after the JCPOA



(From left) AGSIW Board Member Thomas Pickering, Non-Resident Fellow Abdulkhaleq Abdulla, and Executive Vice President Ambassador Stephen A. Seche (moderator)

The Regional Implications of Trump's Iran Policies



(From left) Senior Fellow Ali Alfoneh, Senior Resident Scholar Hussein Ibish (moderator), Non-Resident Fellow Ambassador Susan L. Ziaadeh, and Middle East Institute President Paul Salem

Maximum Pressure: Are Trump's Middle East Policies Starting to Yield Results?



(From left) Raghida Dergham, founder and executive chairman of the Beirut Institute; Hussein Ibish (moderator); and Andrew Peek, deputy assistant secretary of state for Iraq and Iran in the Bureau of Near Eastern Affairs at the U.S. Department of State

What to Make of Trump's Exit from the JCPOA



In a video interview, Senior Resident Scholars Kristin Smith Diwan, left, and Hussein Ibish, center, and former Senior Resident Scholar Karen E. Young discussed the U.S. withdrawal from the Iran nuclear deal.

YEMEN IN FOCUS

UAE Security Forum 2018: “Yemen after the War: Addressing the Challenges of Peace and Reconstruction” | Conference

The third annual UAE Security Forum brought together a diverse group of policymakers and officials in Abu Dhabi, including scholars, economists, international development practitioners, and representatives from nongovernmental organizations, to provide recommendations on how best to secure an economically and politically sustainable Yemen. Various media outlets, including Reuters, The National, and Al Arabiya, covered the discussions.

The Geoeconomics of Reconstruction in Yemen | Publication

Ahead of UAESF 2018, AGSIW's Kristin Smith Diwan, Hussein Ibish, Omar H. Rahman, Peter Salisbury, Ambassador Stephen A. Seche, and Karen E. Young considered the outside forces in the conflict in Yemen, seeking to elucidate who they are, what the nature is of their involvement, and what their converging and conflicting interests mean for reconstruction.

Yemen: After Hodeidah | Publication

At the start of the Saudi- and UAE-backed military campaign for Hodeidah port and city, Non-Resident Fellow Peter Salisbury examined various potential scenarios for the battle and their implications.

Prospects of New Yemen Talks | Video

In a video interview, Executive Vice President Ambassador Stephen A. Seche and Elizabeth Dickinson, senior analyst at the International Crisis Group, discussed the prospects of negotiations on the Yemen conflict prior to talks scheduled in Geneva.

Yemen: National Chaos, Local Order | Event

AGSIW hosted Peter Salisbury for a discussion of his Chatham House paper, “Yemen: National Chaos, Local Order.” The conversation was moderated by Ambassador Stephen A. Seche. Ambassador Gerald M. Feierstein, director for Gulf affairs and government relations at the Middle East Institute, joined the conversation as a discussant.

How to Analyze the Missile Attacks on Saudi Arabia | Publication

Non-Resident Fellow DB Des Roches discussed Houthi missile strikes launched in early 2018 at Saudi Arabia and evaluated the capacity of the Saudi Air Defense Forces to respond to the attacks.

Bringing Yemen Back from the Brink: What Role for Youth Activism? | Event

AGSIW hosted a panel on Yemeni youth activism with Fatima Abo Alasrar, senior analyst at the Arabia Foundation, Waleed Alhariri, head of the Sana’a Center for Strategic Studies’ New York office, and Awssan Kamal, the Yemen Humanitarian campaign lead for Oxfam Yemen.

Media and Outreach

Ambassador Stephen A. Seche commented on the political and humanitarian crisis in Yemen with The New Yorker, NPR, VOA, The Cipher Brief, Axios, among other media outlets. He spoke on a panel for an audience of U.S. Senate staffers and to a Middle East regional studies class at the U.S. Department of State’s Foreign Service Institute.

UAESF 2018 Session 1: Building a Lasting Peace



(From left) Mina Al-Oraibi, *The National* (moderator); Timothy A. Lenderking, U.S. Department of State; Mohammed Abulahoum, Yemen's Justice and Building Party; and Executive Vice President Ambassador Stephen A. Seche

Bringing Yemen Back from the Brink: What Role for Youth Activism?



(From left) Waleed Alhariri, Sana'a Center for Strategic Studies; Awssan Kamal, Oxfam Yemen; Fatima Abo Alasarar, Arabia Foundation; and Ambassador Stephen A. Seche (moderator)

UAESF 2018 Session 3: Developing Yemen's Assets



(From left) Phil Dufty, Emirates Diplomatic Academy (moderator); Elizabeth Dickinson, International Crisis Group; Ala Qasem, DeepRoot Consulting; and Albadr Al Shateri, UAE National Defense College

Yemen: National Chaos, Local Order



Non-Resident Fellow Peter Salisbury and Ambassador Stephen A. Seche

SAUDI ARABIA IN FOCUS

Previewing the MbS Visit to the United States | Event

AGSIW hosted a conversation with Bernard Haykel, director of the Institute for Transregional Study of the Contemporary Middle East, North Africa and Central Asia at Princeton University and a member of the board of directors of AGSIW, previewing Saudi Crown Prince Mohammed bin Salman's spring 2018 visit to the United States.

The Power of Positive Diplomacy: Saudi Outreach in Iraq since 2014 | Publication

Senior Resident Scholar Hussein Ibish analyzed Saudi Arabia's campaign of diplomatic and political outreach to Iraq.

Growing Saudi-Egyptian Ties Face Challenges of Economic Reforms | Publication

Resident Scholar Robert Mogielnicki examined the implications of Riyadh and Cairo's collaboration over megaprojects.

Why Washington Has Reacted So Intensely to the Khashoggi Murder | Publication

Hussein Ibish analyzed the impact in Washington of the death of Saudi journalist Jamal Khashoggi.

Saudi Arabia Shelves SoftBank Solar Effort, Reflecting Challenges with Megaprojects | Publication

Non-Resident Fellow Robin Mills explored Saudi Arabia's decision to delay a \$200 billion solar power project with Japan's SoftBank and considered the future of the kingdom's solar energy initiative.

Saudi Arabia and Climate Change: From Systematic Obstructionism to Conditional Acceptance | Publication

Visiting Scholar Aisha Al-Sarihi discussed Saudi Arabia's rising greenhouse gas emissions and the kingdom's policies on climate change.

Almaha Aldossari: A Chef's Journey to Veganism | Publication

Known on social media as "The Bedouin Vegan," Almaha Aldossari presents the vegan philosophy to her followers as both a global idea and part of Saudi identity. This piece is part of AGSIW's Millennial Gulf blog highlighting youth initiatives in the Gulf.

Media and Outreach

AGSIW Board Members Frank G. Wisner, F. Gregory Gause, III, and Bernard Haykel commented on the U.S. administration's policies toward Saudi Arabia in interviews with NPR.

Throughout the year, Hussein Ibish discussed U.S.-Saudi relations with several media outlets, including AFP, Foreign Policy, The Hill, CNBC, and The New York Times.

Previewing the MbS Visit to the United States



Bernard Haykel, left, director of the Institute for Transregional Study of the Contemporary Middle East, North Africa and Central Asia at Princeton University and AGSIW board member, and AGSIW President Ambassador Marcelle M. Wahba

A Conversation with Majid Al-Moneef



Majid Al-Moneef, center, former secretary general of the Supreme Economic Council of Saudi Arabia and member of the board of directors for Saudi Aramco

Smithsonian Arab Film Series



Senior Resident Scholar Kristin Smith Diwan, left, moderated a discussion at the Smithsonian Arab Film Series with two young Saudi filmmakers on the future of film in the Gulf.

Almaha Aldossari: A Chef's Journey to Veganism



Saudi vegan chef Almaha Aldossari, profiled in AGSIW's Millennial Gulf blog on youth initiatives in the Gulf

GULF RISING *SERIES*

AGSIW's Gulf Rising series analyzes the energized role of the Gulf Arab states in the international system. The series looks beyond Gulf Arab relations with the United States to examine ties with other key countries and regions.

Gulf Rising: GCC-East Asia Relations | Event

AGSIW hosted a workshop on economic and political relations between the GCC countries and East Asia followed by a public panel.

Beyond Energy: The Future of China-GCC Economic Ties | Publication

Haihong Gao, director of the Research Centre for International Finance of the Institute of World Economics and Politics at the Chinese Academy of Social Sciences, explained the GCC states' strengthening economic ties with China.

The Curious Case of China's "Kuwaiti Concession" | Publication

Mohammed al-Sudairi, research fellow at the King Faisal Center for Research and Islamic Studies, examined the economic implications of the Kuwaiti emir's July 2018 visit to China.

Gulf Rising: GCC-Horn of Africa Relations | Event

AGSIW hosted a workshop and public panel on GCC-Horn of Africa relations. Speakers explored the regional and domestic issues that have defined the Gulf states' foreign policy choices toward Horn of Africa countries and vice versa.

Gulf Strategic Interests Reshaping the Horn of Africa | Publication

In a paper informed by the workshop on GCC-Horn of Africa relations, Non-Resident Fellow Taimur Khan explored the Gulf Arab states' growing influence and strategic interests in the Horn of Africa.

Gulf Arab Relations with the Horn of Africa | Video Series

In a series of video interviews, Mohammed Baharoon of b'huth, Elizabeth Dickinson of the International Crisis Group, Michael Woldemariam of Boston University, and Annette Weber of the German Institute for International and Security Studies, discussed historical connections, economic interests, and security strategies of the Gulf Arab countries in the Horn of Africa.

Gulf Rising: GCC-Horn of Africa Relations



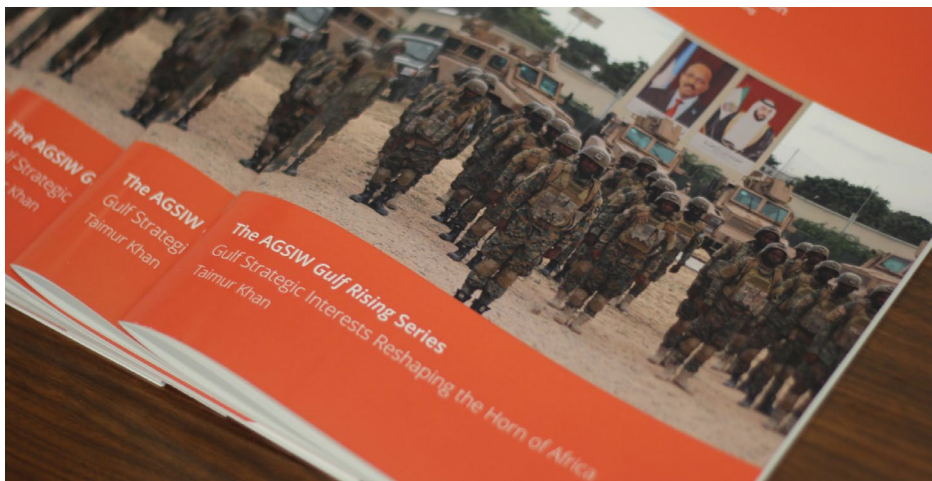
(From left) Michael Woldemariam, Boston University; Senior Resident Scholar Hussein Ibish (moderator); Annette Weber, German Institute for International and Security Studies; Non-Resident Fellow Taimur Khan

Gulf Rising: GCC-East Asia Relations



(From left) Bingbing Wu, Peking University; Senior Resident Scholar Hussein Ibish (moderator); Chas W. Freeman, Brown University; Haihong Gao, Chinese Academy of Social Sciences; and Mohammed Al-Sudairi, King Faisal Center for Research and Islamic Studies

Gulf Strategic Interests Reshaping the Horn of Africa



AGSIW's paper "Gulf Strategic Interests Reshaping the Horn of Africa" by Non-Resident Fellow Taimur Khan

A Conversation on Yemen and the Horn of Africa



Roundtable with Elizabeth Dickinson, senior analyst at the International Crisis Group, on Yemen and the Horn of Africa. Dickinson explained the security strategies of the GCC states toward the Horn of Africa in a video interview for AGSIW.

GULF SOCIETIES IN TRANSITION

Kuwait's MbS: The Reform Agenda of Nasser Sabah al-Ahmed al-Sabah | Publication

Senior Resident Scholar Kristin Smith Diwan examined Prince Nasser Sabah al-Ahmed al-Sabah's role in promoting social and economic reform in Kuwait.

Cracking the Glass Ceiling | Publication Series

Visiting Fellow Thuraiya Alhashmi explored women's labor force participation in the Gulf Arab states, in sectors such as technology, health care, and politics.

Understanding Youth and Women's Employment in Saudi Arabia | Event

Alessandra L. González, senior research associate at the University of Chicago, shared insights from her research on Saudi women's employment in the kingdom.

Let Me Entertain You: Saudi Arabia's New Enthusiasm for Fun | Publication

Kristin Smith Diwan discussed the Saudi General Entertainment Authority's new endorsement of previously banned public entertainment, including cinemas, concerts, and more.

No Cricket, No Play: Regulating Public Space in Gulf Cities | Publication

Visiting Scholar Yasser Elsheshtawy discussed the implications of banning street cricket and other sports in Gulf public spaces.

The Gray Zone of Social Reforms in Saudi Arabia | Publication

Researchers Eman Alhussein and Sara Almohamadi examined the Saudi government's social modernization project and how the new policies are clashing with established norms.

Kuwait's Community Coffeeshop Wave | Publication

As part of AGSIW's Millennial Gulf blog highlighting youth initiatives in the Gulf, Leanah al-Awadhi, co-founder of the Cross Cultural Diwaniya and Equait in Kuwait, explored Kuwait's boom in local coffeeshops and their societal impact.

Food Culture in the Gulf | Publication Series

This series, part of Millennial Gulf, features progressive innovations in food culture, sustainable agriculture, and health in the Gulf states and considers their potential economic and social impacts.

Social Media Influencers in the Gulf Arab States | Publication

Research Associate Marwa Fakhri explored the rise of social media influencers in the Gulf as authorities are regulating their use of social platforms while simultaneously trying to capitalize on their fame.

Media and Outreach

Kristin Smith Diwan commented on political and reform agendas in Saudi Arabia and their societal impact for Bloomberg, AP, The New York Times, among other media outlets.

Understanding Youth and Women's Employment in Saudi Arabia



Alessandra L. González, right, senior research associate at the University of Chicago, in a discussion moderated by Senior Resident Scholar Kristin Smith Diwan

Kuwait's Community Coffeeshop Wave



Coffee and a pastry at Kuwait's Wild Coffee Bar, one of many new coffeeshops in Kuwait highlighted as part of AGSIW's Millennial Gulf blog on youth initiatives in the Gulf

Social Media Influencers in the Gulf Arab States



AGSIW analyzed the rise of Gulf Arab social media influencers, several pictured above, in a publication by Research Associate Marwa Fakih.

Food Culture in the Gulf



Ali BouKhamseen of Kenaneya Farm in Kuwait, profiled in AGSIW's series Food Culture in the Gulf

CHANGING ECONOMIC DYNAMICS

Petro Diplomacy: Back to the Future – Oil and Gas at the Center of New Growth in the GCC States | Conference and Report

For its fourth consecutive year, AGSIW convened its Petro Diplomacy conference to discuss how changes in technology, fiscal priorities, and opportunities for growth continue to alter the relationship between politics and energy in the region and beyond. AGSIW published a conference report following the event.

Enhancing Gas Security: An Economic Imperative for the Gulf Arab States | Publication

In this paper, Non-Resident Fellow Diane Munro analyzed the Gulf Arab states' pursuit of gas-supply security.

Oman's Investment and Reform Strategy: "Slow and Go" | Publication

Former Senior Resident Scholar Karen E. Young examined Oman's strategy toward the challenges of generating investment and infrastructure growth with diminishing fiscal resources.

New UAE Investment Laws Pose Challenge to Free Zones | Publication

Resident Scholar Robert Mogielnicki explored the UAE government's efforts to boost inward foreign investment by legalizing full foreign ownership in specific sectors.

A Conversation with Majid Al-Moneef | Event

AGSIW hosted a roundtable with Majid Al-Moneef, former secretary general of the Supreme Economic Council of Saudi Arabia and member of the board of directors for Saudi Aramco, examining the energy dimension of Saudi Arabia's reform programs.

Tackling Climate Change: Are the Gulf Arab States Doing Enough? | Event

As the 24th Conference of the Parties to the United Nations Framework Convention on Climate Change was taking place in Poland, AGSIW hosted a discussion examining efforts by the Gulf Arab countries to tackle climate change.

Can Iraq's New Oil Minister Reshape the Energy Sector? | Publication

Non-Resident Fellow Kate Dourian discussed challenges facing Iraq's new oil minister, including the restructuring of the country's energy sector.

Why Oil- and Gas-Rich Gulf Arab States are Turning to Coal | Publication

Visiting Scholar Aisha Al-Sarihi explained how some of the hydrocarbon-rich Gulf Arab states are switching to coal to fuel power plants.

Media and Outreach

Aisha Al-Sarihi discussed Gulf Arab countries' climate policies and their impact on economic diversification with Al Arabiya, Oman Observer, and The New Arab.

Karen E. Young addressed various political and economic shifts in the Gulf, including recent economic reforms in Bahrain for The National and World Politics Review.

Petro Diplomacy: Back to the Future – Oil and Gas at the Center of New Growth in the GCC States



H.E. Shaikh Nawaf S. Al-Sabah, chief executive officer of the Kuwait Foreign Petroleum Exploration Company, presented keynote remarks at the Petro Diplomacy conference

Petro Diplomacy Conference Report



AGSIW's report on the 2018 Petro Diplomacy conference

Book Launch – Eruptions of Popular Anger: The Economics of the Arab Spring and Its Aftermath



Elena Ianchovichina, right, deputy chief economist, Latin America and the Caribbean, at the World Bank, and former Senior Resident Scholar Karen E. Young

Are the Gulf Arab States Doing Enough to Tackle Climate Change?



(From left) Visiting Scholar Aisha Al-Sarihi; Colin P. Kelley, Center for Climate and Security; Samantha Gross, Brookings Institution (moderator); and Harry Verhoeven, Georgetown University in Qatar

ARTS AND CULTURE

2018 Gulf Arts and Culture Symposium | Conference and Publication

In partnership with Dubai's Alserkal Avenue, AGSIW hosted its second annual Gulf Arts and Culture Symposium. The symposium featured talks and performances at the Phillips Collection in Washington, DC. With this event, AGSIW published the paper "Big Space/Small Space: Art in the Gulf City" by Visiting Scholar Yasser Elsheshtawy.

Smithsonian Arab Film Series | Event

In partnership with the Smithsonian Freer Gallery of Art and the Arthur M. Sackler Gallery, AGSIW co-presented films from Saudi Arabia during the Smithsonian's annual Arab film series. AGSIW brought two young Saudi filmmakers to discuss how social media and other new technologies are influencing the future of film and media production in the Gulf.

"Yes We Cannes": Cinematic Diversification in Saudi Arabia | Publication

Resident Scholar Robert Mogielnicki discussed the Saudi General Entertainment Authority's plans to invest \$64 billion in the entertainment sector as part of the country's Vision 2030 strategy.

Culture and the City: The Promise of Abu Dhabi's Cultural Quarter | Publication

Yasser Elsheshtawy discussed the potential of Abu Dhabi's Cultural Quarter to serve as a model for urban regeneration in the region.

Ulafa'a: Reconciliation through the Arts in Bahrain | Publication

As part of the Millennial Gulf blog highlighting youth initiatives in the Gulf, AGSIW spoke with the Bahraini art collective Ulafa'a about Bahrain's art scene and the obstacles young Bahraini artists encounter.

Muhannad Shono: Creating His Own Saudi Narrative | Publication

For Millennial Gulf, AGSIW spoke with artist Muhannad Shono about his creations, the struggles of early Saudi artists, and identity narratives in Saudi Arabia.

Abdullah Al-Busais: Fiction Writing in the Gulf | Publication

For Millennial Gulf, AGSIW spoke with Kuwaiti poet and novelist Abdullah Al-Busais about the growing interest in literature among Gulf youth, publishing and censorship issues, and Kuwait's annual book fair.

Media and Outreach

Yasser Elsheshtawy discussed architectural development and public space in the Gulf with National Geographic, The National, and several academic institutions.

Big Spaces, Small Spaces: Urban, Architectural, and Artistic Strategies for City-Based Cultural Districts



(From left), Adrian Ellis, Global Cultural Districts Network; Noura Al Sayeh, Bahrain Authority for Culture and Antiquities; Meitha Saeed Al Mazrooei, WTD Magazine; and Visiting Scholar Yasser Elsheshtawy (Moderator)

Abdullah Al-Busais: Fiction Writing in the Gulf



Covers of Kuwaiti novelist Abdullah Al-Busais' books "The Taste of the Wolf" (left) and "Stray Memories," highlighted in AGSIW's Millennial Gulf blog

Ulafa'a: Reconciliation through the Arts in Bahrain



Members of the Bahraini art collective Ulafa'a, highlighted in AGSIW's Millennial Gulf blog

2018 Gulf Arts and Culture Symposium



A panel at the Phillips Collection in Washington, DC, part of the Gulf Arts and Culture Symposium. (From left) Artist and architect Kosmas Nikolaou, Emirati artist and musician Farah Al Qasimi, artist Vikram Divecha, and Saudi artist Ahaad al-Amoudi

DIGITAL OUTREACH

In September 2018, AGSIW launched its newly redesigned website, available in English and Arabic. AGSIW.org has become an essential resource for analysis on the Gulf Arab countries. With the new design, users have easier access to the content they need – organized by topics and countries – and can find more event videos, interviews, and conversations with experts.

Topics

Offering in-depth coverage on key topics, including arts and culture, economy, energy, environment, politics and governance, security, and society

Arts and Culture

Culture and the City: The Promise of Abu Dhabi's Cultural Quarter
Yasser Elsheshtawy · Dec 19, 2018
Abu Dhabi's Cultural Quarter, opened at the site of what was long the city's social and cultural heart, is unique in its integration of culture and space, and could serve as a model for urban regeneration.

Abdullah Al-Busais: Fiction Writing in the Gulf
Marwa Fakhri · Dec 17, 2018
AGSIW spoke with Kuwaiti poet and novelist Abdullah Al-Busais about the growing interest in literature among Gulf youth, publishing and censorship issues, and the recent book fair in Kuwait.

Muhannad Shono: Creating His Own Saudi Narrative
Marwa Fakhri · Sep 10, 2018
When Muhannad Shono began his career Saudi's creative economy was not a domain to be celebrated in the kingdom.

Countries

Covering the six countries of the Gulf Cooperation Council, as well as Iran, Yemen, and regional affairs

United Arab Emirates

New UAE Investment Laws Pose Challenge to Free Zones
Robert Mogielnicki · Dec 6, 2018
Government efforts to legalize full foreign ownership in specific sectors aim to significantly boost inward foreign investments. However, the commercial reform threatens to disrupt the long-standing economic institutions and commercial incentives associated with free zones.

Integrating Climate Change Policies with Economic Diversification Strategies: Challenges and Opportunities in Oman and the UAE
Aisha Al-Sarhi via Rice University's Baker Institute for Public Policy · Aug 13, 2018
Since the 1930s, the Arab Gulf states have been defined by their hydrocarbon wealth.

Ethiopia-Eritrea Reconciliation Offers Glimpse into Growing UAE Regional Influence
Taimur Khan · Jul 13, 2018
On July 9, the leaders of Ethiopia and Eritrea signed a historic peace accord and a set of trade and security agreements ending a long-running conflict that has been a key regional fault line destabilizing the Horn of Africa.

2018 By the Numbers

Events and Publications

Events	Event Attendees	Publications	Newsletter Subscribers	Media Appearances
				
44	1,800+	175	3,400+	188

Topics Covered - Percentage



AGSIW CORPORATE MEMBERS

The Raytheon logo, featuring the word "Raytheon" in a bold, red, sans-serif font.

Human Energy®



Grants and Partnerships

AGSIW partnered with the following institutions in 2018 for programming and publications:

- The World Bank
- Smithsonian Institution in Washington, DC
- Chevron
- Al Serkal Avenue (Dubai)
- Arab Strategy Forum
- AmCham Abu Dhabi
- The National (UAE)
- Etihad Airways

Join AGSIW's Corporate Circle today

Membership in AGSIW's Corporate Circle provides unique access to exclusive programming and bespoke briefings on the major issues shaping the Gulf Arab states. Members benefit from an informed and credible Gulf perspective that is central to all AGSIW activities. In addition to opportunities to attend invitation-only discussions with U.S. and Gulf policymakers and experts, members may request briefings with AGSIW scholars to dive deeper into areas of interest.

For more information:

Anna Chernyavskaya, Chief Financial Officer and Director of Business Development | anna.chernyavskaya@agsiw.org

FINANCIAL INFORMATION

Statement of Financial Position

As of year ended December 31, 2018

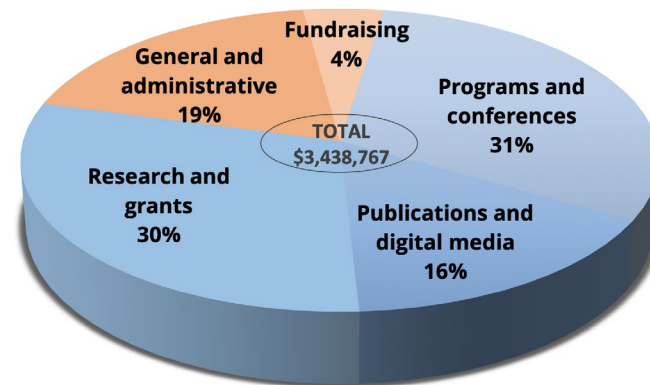
ASSETS	2018
Cash and short-term investments	\$ 3,415,392
Grants and accounts receivable	3,063,623
Property and equipment, net	366,615
Other assets	89,635
TOTAL ASSETS	6,935,265
LIABILITIES AND NET ASSETS	
LIABILITIES	
Accounts payable and accrued expenses	178,173
Deferred revenue	40,000
Deferred rent abatement	132,280
TOTAL LIABILITIES	350,453
NET ASSETS	
Unrestricted	3,447,309
Temporary restricted	3,137,503
TOTAL NET ASSETS	6,584,812
TOTAL LIABILITIES AND NET ASSETS	\$ 6,935,265

Statement of Activities and Changes in Net Assets

For the year ended December 31, 2018

REVENUE	2018
Grants and contributions	\$ 3,373,821
Interest income	34,908
In-kind contributions	16,465
TOTAL REVENUE	3,425,194
EXPENSES	
Program services	2,636,169
Support services	802,598
TOTAL EXPENSES	3,438,767
CHANGE IN NET ASSETS	(13,573)
NET ASSETS, BEGINNING OF THE YEAR	6,598,385
NET ASSETS, AS OF DECEMBER 31, 2018	\$ 6,584,812

2018 Expenses by Function



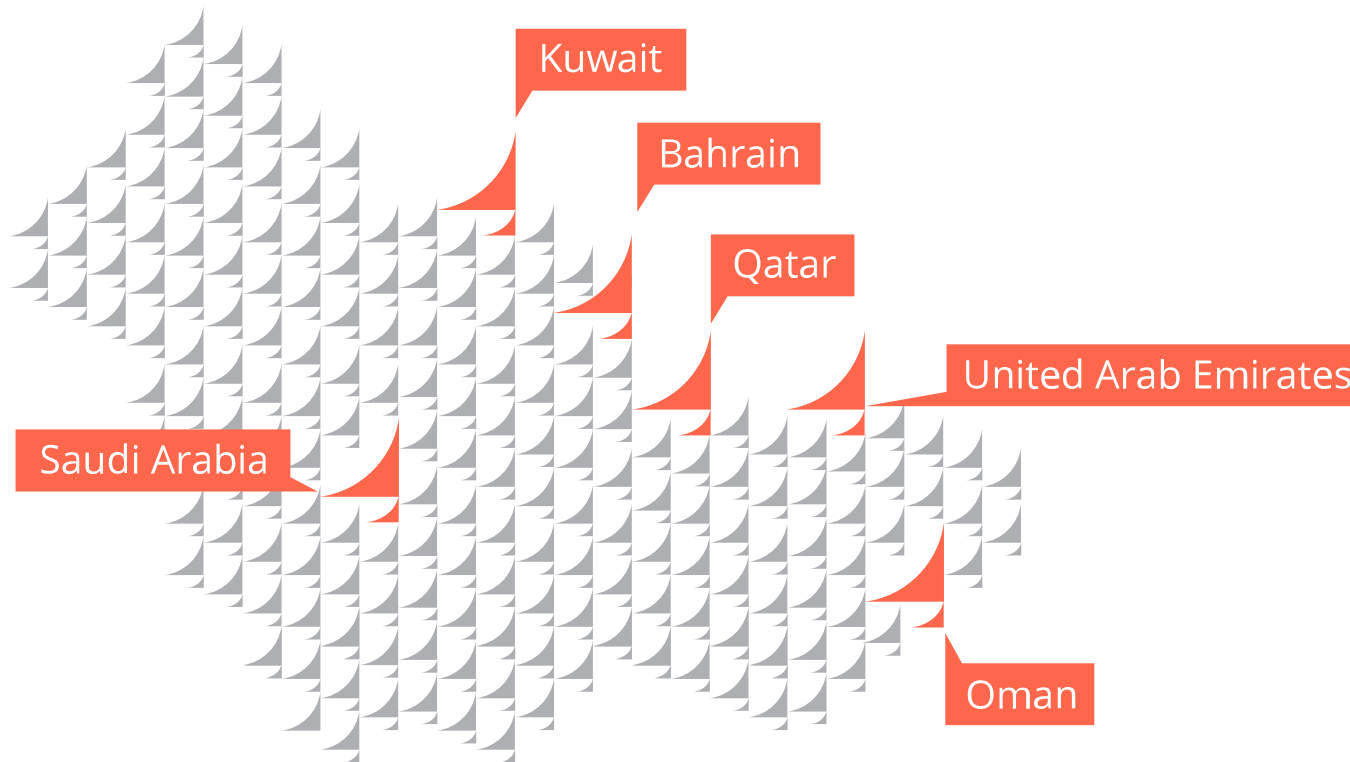
2018 IN PICTURES



(Top Left, Clockwise) AGSIW's third anniversary celebration; Executive Vice President Ambassador Stephen A. Seche, right, moderated a roundtable with Mohammed Baharoon of b'huth, the Dubai Public Policy Research Centre; Gulf-based artists at the Gulf Arts and Culture Symposium; Lana Nusseibeh, left, UAE ambassador and permanent representative to the United Nations, and AGSIW President Ambassador Marcelle M. Wahba; AGSIW celebrated with Ambassador Marcelle M. Wahba, center, who received the Najeeb Halaby Award for Public Service at the Kahlil Gibran Spirit of Humanity Awards, hosted by the Arab American Institute; Ambassador Marcelle M. Wahba, second from left, alongside fellow awardees Irish Senator Frances Black, Michelin-starred chef José Andrés, and the American Civil Liberties Union, represented by Anthony Romero



(Top Left, Clockwise) Ambassador Stephen A. Seche at the UAE Security Forum 2018; Session 2 panel at the UAE Security Forum 2018; Ambassador Marcelle M. Wahba presented opening remarks at the UAE Security Forum 2018; Gulf Rising workshop on GCC-Horn of Africa relations with Non-Resident Fellow Taimur Khan, left, and Annette Weber of the German Institute for International and Security Studies; A member of the audience asked a question at an AGSIW panel; H.E. Shaikh Nawaf S. Al-Sabah, chief executive officer of the Kuwait Foreign Petroleum Exploration Company, left, with moderator Ambassador Deborah K. Jones, answered questions during the Petro Diplomacy conference



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معهد دول الخليج العربية في واشنطن

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