

Report

WORKING GROUP ON GULF FOREIGN POLICY

Meeting IV – Key Takeaways

Fiker Institute's Working Group on Gulf Foreign Policy held its fourth meeting on June 15, 2026, bringing together expert voices from the six Gulf Cooperation Council (GCC) countries to exchange views on the announcement of a Memorandum of Understanding (MOU) between Iran and the United States (US) and its implication for regional security.

The takeaways below are a summary of the discussions and reflect multiple perspectives. They are not a unified view of all participants, and do not represent Fiker Institute.

KEY TAKEAWAYS

On the announcement of a US-Iran Memorandum of Understanding

The Working Group reflected on the announcement of an MOU between Iran and the US. While the agreement has been signed by both parties, many questions remain. Some members expressed uncertainty around the terms and sustainability of what is a non-binding MOU rather than a legally binding agreement. They emphasized that the MOU is an interim bargain rather than a comprehensive framework addressing the key tensions between the parties. Moreover, some questioned how any agreement would fare after President Trump leaves office with the conclusion of his current term. Others welcomed the announcement as revealing the outlines of a possible endgame. The question of the Lebanon front of the war was also highlighted considering Israel's announcement that it was not involved in the process.

The Group discussed the GCC states' positions on the MOU's announcement and their views on an eventual deal. They highlighted that Gulf states have historically been supportive of diplomacy and deescalation and are thus likely to support an agreement in principle. However, Gulf capitals are wary of a rerun of the 2015 Joint Comprehensive Plan of Action (JCPOA) where they were excluded from both the negotiating process and the definition of the agreement's objectives. Thus, Gulf states are unlikely to be comfortable with an agreement that addresses only the nuclear file and leaves broader regional security concerns, like Iran's support for non-state actors, control over the Strait of Hormuz, and interference in Gulf states' domestic affairs, unresolved. Moreover, Gulf capitals expect to be consulted on any agreements that affect their regional security environment. Finally, any long-term arrangement will need to demonstrate that it contributes to durable stability in the region rather than merely postponing tensions.

The Group also highlighted the role of Russia and China in any durable long-term framework. Some members argued that GCC states will have to balance engagements with the US and China given the possibility of Beijing acting as a guarantor for a future conflict resolution mechanism. Similarly, any agreement will have to secure Russian support to ensure sustainable deescalation and economic prosperity.

On the evolution of the war since the ceasefire

The Working Group also discussed how the evolution of the war prior to the announcement of the MOU has shaped the regional security calculus. Despite the ceasefire, strikes continued, with Kuwait and Bahrain in particular coming under attack from Iranian missiles and drones.

The developments underscore broader implications for the Gulf. A foreign policy position rooted in caution, diplomacy, and restraint is not an equation for immunity. Countries like Kuwait, which has traditionally maintained neutrality and sought to play a mediating role, nevertheless came under attack. The strikes on civilian infrastructure, notably airports and air traffic control systems, have shown that the war is one of infrastructural vulnerability where Iran can generate pressure by threatening the systems that enable Gulf states to keep their societies functioning.

On the maritime theater of war

Another key aspect of the conflict has been the ongoing closure of the Strait of Hormuz and the threat of shipping disruptions in the Red Sea. While the MOU aims to reopen the Strait, the Working Group discussed the implications of the maritime chokepoints at Hormuz and Bab al-Mandeb. Notably, it underlined that the crisis around the blockade of Hormuz was the result of the threat to close the Strait rather than extensive physical measures. Announcements by Iran that it would target ships crossing the Strait raised insurance premiums and led to ships re-routing on their own, resulting in severe drops and delays in oil flows. The key factor was the credibility of the threat rather than its execution.

The question of why Iran had not pressured the Houthis to close Bab al-Mandeb during the war was also discussed. Some posited that Tehran's decision to restrain further escalation in the Red Sea preserved a key pressure point for the Iranian regime in negotiations, while the closure of Bab al-Mandeb would likely have triggered an overwhelming military response.

Regardless of the MOU, the threat of maritime blockades will persist. Some Working Group members argued that for the Gulf states, the long-term objective should be to render Iran's leverage over maritime chokepoints worthless. Key measures to this effect include developing alternative trade routes and export corridors, implementing insurance and economic tools to absorb the shocks of future closures, and giving Asian partners a bigger stake in keeping maritime trade routes open. Some members also highlighted the role the private sector could play in this, for example through offshore oil and gas infrastructure.

On the Gulf's position in the emerging regional order

With the possible end of the active phase of the conflict following the signing of the MOU, questions around the shifting regional security order are emerging. The Working Group discussed how the GCC states will navigate the longer-term fallout of the war and what the conflict has revealed about Gulf states' agency.

The Group deliberated Gulf capitals' influence on the negotiating process. While some Gulf states, like Qatar, have been involved in diplomatic efforts between the US and Iran, some Working Group members questioned whether this was an expression of agency or rather a reflection of Gulf states' tactical convenience as a go-between. Others argued that regardless of the process of reaching an agreement between the US and Iran, Gulf capitals will be key stakeholders in defining the parameters of its implementation; any measures around sanctions relief, for example, would be shaped by Gulf states, many of which host significant Iranian assets.

The Group also specifically discussed Qatar's reemergence as a mediator. Its role appears to have been focused on moving the process from escalation to conflict management. Firstly, Doha played a key role in keeping communication channels between Tehran and Washington open under the condition that it would not be attacked. Secondly, Qatar appears to have worked to narrow the tactical disagreements between the parties, including on issues like sanctions relief, Iran's uranium enrichment, and the reopening of the Strait of Hormuz. Finally, its efforts appear to have been important in creating the conditions for both the US and Iran to save face. However, some argued that Qatar's mediation efforts demonstrate agency on a state level rather than broader Gulf leverage at play.

Some Working Group members also expressed worry that the new norm for the region in the immediate term will be cycles of violence that draw in Gulf states, emphasizing that deescalation cannot come hand in hand with continued coercive threats. Arguments were made for a more active public diplomacy by Gulf capitals and a clear denouncement of the broader Gulf being drawn into the conflict. Similarly, some emphasized the need for a balance of defensive and offensive posturing to prevent the normalization of attacks on civilian infrastructure.

On possible Gulf-Iran engagements

The Working Group also raised the possibility of direct negotiations between Iran and the Gulf states in addition to any long-term US-Iran agreement. The Group emphasized that the geographic reality of the Gulf states' proximity to Iran will require engagement with Tehran on the Gulf states' own terms. This would allow Gulf capitals to use their collective leverage and reduce their dependence on Washington. At the same time, Gulf states' diplomatic engagement would be in line with the US' stance which appears

to have lost appetite to pursue military confrontation with Iran.civilian infrastructure.

Some members argued that Gulf capitals should pursue a non-aggression pact with Iran. Terms could include Iranian guarantees not to target Gulf states if hostilities with the US were to escalate again, as well as Iranian guarantees of non-interference in Gulf states' domestic affairs. Negotiations towards such an agreement could be led by the GCC as an organization. Some Working Group members were skeptical about the realistic prospects for such an agreement, arguing that Iran would be unlikely to accept terms that would allow for the continued presence of US bases. Moreover, given the lack of a unified posture between GCC capitals, the prospect for a joint negotiation process with Iran could be premature.

The possibility of economic integration was also raised. Some argued that an economic deal involving mutual trade and investment could raise incentives for peace between Iran and the Gulf states. For Gulf capitals, Iran's market presents significant economic opportunities given its size, proximity, and industrial and manufacturing capacities. For Tehran, Gulf trade and investments would present a vital economic lifeline and help allay domestic pressures over the worsening economic situation in the country.

On the geopolitical blocs emerging from the war

The war has led to the emergence of new geopolitical blocs, notably the quadrilateral including Türkiye, Saudi Arabia, Egypt, and Pakistan. The group formed with the aim of containing the spillover from the war on Iran, and it could play a role in facilitating technical discussions between the US and Iran in negotiations following the MOU. However, a key question is whether the group will outlast the war, as Cairo, Ankara, Islamabad, and Riyadh are likely to diverge in terms of their threat perception once the immediate threat of Iran is contained. On the economic front, however, the grouping has shared interests, and economic collaboration could outlast security cooperation. A notable example is the announcement of the Hijaz railway project that will link Saudi Arabia and Türkiye.

In many ways, the current interim phase is marked by cautious anticipation and limited strategic clarity. Gulf states will likely use this window to assess the terms of the MOU, its enforcement mechanisms, and the extent to which their security concerns are reflected in the post-war arrangement. Until then, the bloc remains in a holding pattern, preparing for possible deescalation while staying alert to the risks of renewed conflict.

PARTICIPANTS

The fourth Working Group was attended by:

- **Ahmed Buhejji** (Bahrain), First Secretary at Ministry of Foreign Affairs of Bahrain & Al-Khaleej Fellow at Fiker Institute
- **Dr Bader Al-Saif** (Kuwait), President of Al-Saif Consulting
- **Dubai Abulhoul** (UAE), Founder of Fiker Institute
- **Dr Khalid Al-Jufairi** (Qatar), Adjunct Associate Professor at Georgetown University in Qatar & Al-Khaleej Fellow at Fiker Institute
- **Mahdi Jasim Ghuloom** (Bahrain), Junior Fellow in Geopolitics at the Observer Research Foundation – Middle East
- **Dr Naser Alsayed** (Bahrain), Queen Elizabeth II Academy Fellow at Chatham House
- **Nayef Al-Nabet** (Qatar), Nonresident Fellow at the Middle East Council on Global Affairs
- **Dr Nourah Shuaibi** (Kuwait), Assistant Professor at Kuwait University
- **Sultan Sooud Al-Qassemi** (UAE), Founder of Barjeel Art Foundation

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Foreign Policy: Meeting IV –
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June 2026

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