

Research Conference Paper

WILL THE IRAN WAR CHANGE THE GCC STATES' GRAND STRATEGIES?

Dr Rob Geist Pinfold

ABOUT FIKER INSTITUTE'S RESEARCH CONFERENCE: ORDER(S) IN THE MIDDLE EAST: PIVOTS & REALIGNMENTS

Fiker Institute held its Research Conference titled “Order(s) in the Middle East: Pivots & Realignment,” convening global and regional academics and experts for a full day of research-led discussion on the shifting foundations of regional order. Across five sessions, the conference examined the future of Arab multilateralism, the resilience and limits of GCC grand strategy, the Gulf’s evolving role as a rules-shaper, the consequences of strategic non-alignment amid chokepoint disruptions, and the mediation vacuum shaping crisis management across the Middle East. The Conference created a space for rigorous exchange on how regional actors are navigating realignments, institutional constraints, and new forms of geopolitical agency. This Research Conference Paper is part of a series showcasing the work of the participants of the Conference.

The 2026 United States (US)-Israel attack on Iran came as a profound shock to the Gulf states. Though far from a unitary actor, the Gulf Cooperation Council (GCC) states all shared to varying degrees three core assumptions: hosting US bases and cultivating close diplomatic ties to Washington would deter an attack by any hostile power; maintaining dialogue with Tehran would disincentivize Iranian aggression; and that the Gulf states could best advance their national interests individually, rather than as a collective body in the style of the North Atlantic Treaty Organization (NATO) or the European Union (EU). And yet, the GCC states soon found themselves collectively and directly in the firing line as Iran attacked civilian and critical infrastructure in every single one of them. This was despite lobbying Washington against starting the war and denying the US use of military bases within their countries to target Iran. The presence of US bases not only failed to deter an attack; on the contrary, Tehran used the presence of US assets within the Gulf to justify its targeting of the GCC states.

Consequently, many analysts predicted that the Gulf states would overhaul their foreign and security policies, which have been stress-tested like never before. Could the GCC states at last agree to form a ‘Gulf NATO’? Could they end their policy of engagement with Iran? Has the US defense umbrella been unequivocally proven to be a poor provider of regional security? The war thus quickly led to speculation that the Gulf leaders would “rethink everything”¹ by drastically altering their grand strategies, commonly understood as a state’s “theory about how to produce security for itself.”²

At the time of writing, however, there is little sign of the conflict precipitating grand strategic overhaul in any GCC state. Despite a short-term respite, Gulf geopolitical rivalry quickly reasserted itself, while no GCC state seems to be seriously reconsidering the long-standing appraisal of the US’ status as the region’s premier security guarantor. Concurrently, even Gulf states who condemned Iran’s actions in particularly hawkish terms have maintained high-level dialogue with Tehran. This raises the question: why did such a traumatic shock not produce systemic change in the GCC states’ grand strategies?

This paper argues that while the war damaged confidence in the three aforementioned core assumptions of Gulf grand strategy, it did not discredit these assumptions sufficiently to make plausible alternatives more attractive. The GCC states will therefore likely pursue second-order grand strategic adjustments: smarter defense spending, more constrained engagement with Iran, and greater infrastructure resilience, in addition to articulating and operationalizing a coordinated effort to deter and disincentivize any future Iranian attack. Yet the deeper policy paradigm is unlikely to change in that the US will remain an indispensable ally, some engagement with Iran remains unavoidable, and collective security will remain limited by intra-GCC rivalry. In sum, this paper demonstrates that even when faced with unprecedented challenges,

grand strategy tends to be largely characterized by continuity.

THREE PILLARS OF GULF GRAND STRATEGY

The first longstanding pillar of Gulf grand strategy was a collective faith in the US as the guarantor of a great power security 'umbrella.' The 1945 meeting between US President Franklin D. Roosevelt and Saudi King Abdulaziz bin Abdul Rahman Al Saud (also known as Ibn Saud) on the USS Quincy cruiser is often cited as the point at which Washington's long-standing security role in the Gulf began.³ The two leaders negotiated a quid pro quo: in exchange for Saudi Arabia allowing US access to its energy supplies, the US would, in turn, protect the Kingdom from any threats. The Soviet Union's backing for the wave of post-colonial Arab republican nationalism that subsequently swept the region made the conservative Gulf states' perceived need for compensatory security guarantees particularly acute. Yet it was the 1990 Iraqi invasion of Kuwait that cemented the US as the Gulf's security guarantor.⁴ The conflict demonstrated Washington's willingness and unique capacity to defend the territorial integrity of Gulf states against revisionist regional powers. Thereafter, US bases, arms sales, and defense cooperation became central pillars of Gulf security strategy, with the US-Gulf relationship remaining durable despite multiple challenges.⁵

The second pillar of Gulf grand strategy was an understanding that while Iran's revolutionary regime was a significant threat (and possibly the single gravest threat to the Gulf), the rivalry should be mitigated and managed rather than escalated through military force. The expectation was that Iran's destabilizing regional behavior could be moderated by incentives, or that this paradigm would at least insulate the Gulf states from Tehran's revisionism. This is why the United Arab Emirates (UAE) cultivated robust economic ties to Iran, while Oman and Qatar established diplomatic channels to pursue mediation and crisis management.^{6,7} Even Saudi Arabia, Tehran's principal Gulf rival, agreed to a *détente* with Iran in 2023, likely partly in the hope that de-escalating tensions would help Riyadh extricate itself from the war in Yemen and create the regional stability necessary to pursue Vision 2030.⁸ Rooted in the traditional pan-Gulf preference for quiet diplomacy and restraint over military adventurism and escalation, the Gulf states continued to adhere to de-escalation despite Iran's support for revisionist, violent non-state actors within not only other regional countries but in the Gulf states themselves.⁹

The third Gulf grand strategic preference was less explicit but equally significant: a perception that national interests are best pursued individually or through ad hoc cooperation, rather than via a strong collective supranational body. The GCC was founded in 1981, shortly after the Iranian Revolution, to establish a regional force-multiplier to counter Tehran's regional revisionism.¹⁰ However, it has often functioned more as a

forum for coordination between sovereign states than as a Gulf version of NATO or the EU. This is partly because of fears that a more empowered GCC would be collective in name only. Indeed, Saudi calls for a stronger GCC in 2013 led to Oman threatening to leave the alliance entirely.¹¹

STRESS-TESTING GULF GRAND STRATEGY

These three pillars of Gulf grand strategy proved resilient until the US-Israeli attack on Iran in 2026. Ties with neither Tehran nor Washington proved fully fit for purpose in the Gulf's moment of need. Dialogue with Tehran has at best failed and at worst fueled a dangerous assumption that the Gulf states will maintain their engagement with Iran regardless of the damage it causes. What is also indisputable is that the US bases in the region did not deter Iran and were on the contrary used to justify Tehran's attacks on Gulf civilian infrastructure.¹² The outbreak of war itself – which the Gulf countries collectively sought to prevent – also revealed the limits of the GCC states' recent investments in deepening political ties to Washington, contributing to the perception that the Gulf states are second-tier US allies paying a first-rate price for a war they never wanted.¹³

Concurrently, the Gulf states were criticized for their perceived passivity as both individual sovereign states and as a GCC collective.¹⁴ Despite their diverse stances and threat perceptions vis-à-vis Iran, none were spared Tehran's wrath. Qatar and Oman attracted criticism^{15,16} by pursuing extensive high-level diplomatic ties with Tehran yet were repeatedly attacked by Iran during the war. Though the UAE had the most extensive economic ties¹⁷ to Iran of any Gulf state, it was hit more than any other GCC member. Iran used the divides between the Gulf states to its advantage. This led some commentators to suggest that a more unified position would not only have been valuable during the war, but that it could in the future facilitate a collective response to a similar crisis.¹⁸

It is therefore unsurprising that the Gulf states' grand strategies and the assumptions underpinning them are being scrutinized and critiqued now more than ever before. This is a common occurrence when states face “critical situations”: events that are so unexpected and traumatic that they cause elites and publics alike to consider alternatives to the status quo that were previously seen as illegitimate or undesirable.¹⁹ The grand strategy scholar William D. James argues that “high impact events” are a necessary condition for undoing the “psychological or institutional inertia” that precludes grand strategic change.²⁰ This claim is supported by Patrick Porter, who defines such events as “rapidly changing material conditions, shocking enough to disconfirm the assumptions of the status quo.”²¹

At first glance, the recent war fits the bill, having posed the most significant challenge

for the Gulf states since the First Gulf War. Oxford Economics cut its 2026 GCC real gross domestic product (GDP) growth forecast by 1.8 percentage points, while the first weeks of the conflict cost the region \$600 million per day in lost tourism revenues.^{22,23} Bahrain's credit outlook was downgraded from stable to negative²⁴ and Kuwait experienced its first month of not exporting a single barrel of oil since 1991.²⁵ The war has yet to reach a clear endpoint, with Iran still exercising unprecedented control over the Strait of Hormuz, a vital lifeline for the importing and exporting of goods by Gulf states. Worse still, despite a ceasefire, hostilities continued; Iran-linked attacks on the Gulf states persisted (albeit with lower frequency), hampering recovery. In short, the war seriously stress-tested all three pillars of Gulf grand strategy. The key question is whether this shock was sufficient to discredit the assumptions underpinning these pillars and make plausible alternatives more attractive.

THE LIMITS OF CHANGE

The evidence to answer this question may be less clear-cut than it might initially seem. When compared to the application of scholar Brent Steele's discussion of "critical situations"²⁶ beyond the GCC states, the categorization of the 2026 Iran War as a traumatic event on a similar scale is more questionable. Scholars have focused particularly on identifying events that precipitated change within US grand strategy, such as unexpected mass casualty attacks. For instance, running as a presidential candidate before the 9/11 attacks, George W. Bush claimed: "I don't think our troops ought to be used for what's called nation-building." Conversely, in the aftermath of the attacks, he ordered a comprehensive occupation of Iraq and Afghanistan before subsequently seeking to transform both societies into democracies.²⁷ Similarly, it took the trauma of the Pearl Harbor attack and over 2,400 American fatalities²⁸ for the US to abandon its neutrality during World War II (WWII). Even when change was not precipitated by a mass casualty attack – such as the US' shift from containment (limiting the spread of communism) during the Cold War to global primacy (establishing its historically unrivaled position as a global hegemon) in its aftermath²⁹ – grand strategic transformation was precipitated by a systemic change in the world order and the unexpected demise of a superpower rival.³⁰

Iran's recent shift away from its non-state militant client network – the so-called "axis of resistance" – pillar of its foreign and security policy is equally illuminating for highlighting how external inputs can induce grand strategic change. Iran had long relied on this network to act as a military counterbalance to Israel, allowing it to project deterrence and achieve "forward defence"³¹ by localizing conflict on Israel's borders, away from Iranian territory. However, Tehran shifted away from this long-standing policy paradigm in 2024 and 2025 when it attacked Israel directly with drones and ballistic missiles fired from within Iranian territory. Tehran did not abandon its use of

the “axis of resistance” – as illustrated by the continued role of the Houthis, Hezbollah, and others in the ongoing conflict – but it has supplemented them with more overt, state-centric means of projecting deterrence. In short, Iran induced exactly what its long-standing grand strategy had sought to avoid – a state-on-state conflict with an objectively more powerful rival – because it apparently felt that it had no choice. It was left with an unenviable decision: either escalate militarily to defend its vulnerable regional network, or risk compromising its position as the head of the “axis of resistance.”³²

Comparatively, in terms of critical situations, the Gulf states are facing a less dire strategic predicament. The casualties they endured and the damage to their economies and prestige are not insignificant, and Gulf audiences were shocked by the scale of Iran’s targeting of civilian infrastructure. However, Iran was unable to cause severe degradation of any state’s ability to govern. The political and/or economic collapse that some commentators warned of did not occur.³³ Accordingly, the Gulf states’ grand strategies and the assumptions underpinning them may exhibit more continuity than change.

The demonstrable patterns of change that have taken place do not negate the likelihood of continuity predominating. Many of these – Saudi Arabia’s pivot away from megaprojects, the UAE’s exit from the Organization of the Petroleum Exporting Countries (OPEC), and the Gulf’s collective diversification of oil and gas pipelines – should not be framed as a product of the recent conflict. These are all long-term grand strategic shifts that continued apace after the conflict, but they also predate it.^{34,35} Even the 2026 Mecca Joint Defence Agreement between Saudi Arabia, Pakistan, and Türkiye, which might appear to signal a new Saudi grand-strategic paradigm, largely formalizes pre-existing trends: Riyadh and Islamabad have maintained close security ties for decades, while Ankara and Riyadh had already begun overcoming their deep-rooted rivalry prior to the Agreement.^{36,37} Thus, the reactions to the conflict have illustrated that the war did not meet the threshold for inducing transformative change. Instead, it affirmed and expedited pre-war assumptions regarding what needed to change, rather than in itself generating a substantive policy overhaul.

IN DEFENSE OF CONTINUITY

There is also sound strategic logic for the Gulf states to retain the broader contours of their pre-war grand strategies and the perceptions behind them. The GCC states are not in the unenviable position of having no choice but to change as a knee-jerk response to an external stimulus. Instead, cool heads can prevail. Heuristics can fail and grand strategies should be debated, yet they also exist for a reason: they are the product of decades of learned experience.

The Gulf states have an established record of strategic patience. They have historically been status quo powers, adopting conservative ruling principles internally and an accompanying external cognizance of their limited ability to reshape geopolitics. This has prejudiced them toward military restraint and strategic continuity over radical change.³⁸ The Mecca Joint Defence Agreement reflects this preference for strategic continuity. Rather than replacing Saudi Arabia's existing security relationships, it builds on long-standing ties with Pakistan and more recent defense cooperation with Türkiye. When the Gulf states have experimented with sudden change in response to a perceived threat, the results were often sub-optimal, precipitating a return to adherence to more status quo-oriented, less transformative statecraft.³⁹

This is likely why, at the time of writing, Saudi Arabia has resisted answering repeated Houthi attacks with a wholesale renewal of its campaign against them in Yemen. It may yet do so, but it will likely only pursue this option once its preferred method for resolving the crisis – diplomacy – has categorically failed. Even after the Saudi-led coalition in Yemen has promised a firm response to the recent Houthi strikes, the preferred option for Saudi remains the avoidance of full-scale war.^{40,41} Saudi Arabia's participation in US strikes against Iran-backed targets in Iraq also illustrates that grand strategic continuity can coexist with changes in statecraft. Riyadh adopted a more offensive posture as the conflict evolved. It did not, however, abandon all restraint and fully join the US-led campaign against Iran. Saudi leaders have repeatedly condemned the war and have backed talks over a return to conflict.⁴²

Concurrently, the pan-Gulf decision during the early phases of the war to largely refrain from retaliating against Iran's repeated strikes may prove an expedient one. It was an indubitably difficult choice, with Gulf leaders warning that the scale of Iran's attacks risked crossing a threshold where non-response would be impossible to maintain (which, as it turned out, it ended up being for some Gulf states). It has also been tested, as illustrated by joint US-Saudi strikes against pro-Iranian militias in Iraq, after the latter targeted Saudi Arabia.⁴³ Yet Gulf fears that the US lacked a clear strategy to expedite regime change in Iran and that the war would therefore only further regional instability have now been vindicated. Simultaneously, Israel's war aims seem to be less regime change and more to move the conflict's center of gravity away from its own borders and onto Iran, thus providing Tel Aviv with greater strategic depth. For the Gulf states, though, this has had the opposite effect, creating an indefinite cycle of instability on their doorstep and hampering any post-conflict GCC economic recovery.⁴⁴

Even when it comes to the much-criticized US security umbrella, the case for retaining the relationship remains strong. Firstly, given that Iran's wartime strategy was to hit high-value targets to maximize global economic chaos, Tehran's claim that it targeted the Gulf states because of the presence of US bases and military personnel is not

credible.⁴⁵ Secondly, any retrenchment of the US' regional presence would be counter-productive as it would not only allow Tehran to claim victory and create a greater defense deficit for the Gulf than ever before, but it would also vindicate Iran's strategy of inducing desired policy changes from the US by attacking the GCC states. Thirdly, there is the indisputable fact that cutting-edge US-made and sometimes US-manned defense technology, from interceptor systems like the Patriot and Terminal High Altitude Area Defense (THAAD) to billion-dollar radar and detection systems, saved countless lives in the Gulf.

The final element of grand strategic continuity for GCC states will be to accept that they have to coexist with Iran. The Iranian regime still stands in an inescapable geographic reality for Gulf states, with the lack of any high-profile defections or coup attempts by its personnel demonstrating its staying power. The alternative remains less likely to be a successor regime waiting in the wings to seamlessly take power and more likely a recipe for state breakdown and indefinite chaos: the exact outcome the ongoing war has precipitated and the one that the Gulf states have long sought to avoid. Iran's continued attacks on Gulf states may place this paradigm under strain. However, absent a viable alternative to the long-standing status quo of cautious engagement, even significant retaliatory measures such as the UAE's renewed curtailment of economic ties are more likely to narrow the scope of engagement, rather than eliminate it altogether. This is likely why multiple Gulf leaders, even from some of the states hardest hit, have held high-level calls with their Iranian counterparts. This is an example of pragmatism: seeing regional geopolitics for what it is, rather than what the Gulf states may want it to look like.⁴⁶

WHAT SHOULD (OR WILL) CHANGE?

Nevertheless, these elements of continuity do not preclude policy alterations. The lack of systemic grand strategic change does not imply that policy stasis is likely. Indeed, smaller policy shifts can be expedient and necessary. In relations with Iran, this means modifying but not abandoning the pre-war emphasis on engagement. Recent experience, such as Iran's attacks on the UAE and Qatar, illustrates that robust financial or political ties to Iran will neither moderate its broader regional actions, nor disincentivize it from attacking the Gulf. Equally, the war has elicited regime change in Iran, but not in the direction that the US intended; it has shifted Iran's complex political dynamics decisively in favor of hardliners from the Islamic Revolutionary Guard Corps (IRGC).⁴⁷ Gulf diplomacy vis-à-vis Iran should therefore be constrained to mediation and de-escalation, rather than deep engagement. Gulf leaders should be conscious of the limitations of diplomatic statecraft to comprehensively alter Iran's behavior or curb its wartime belligerence. That Qatar at first refused to mediate US-Iran talks, before subsequently passing messages between both parties, illustrates that Gulf leaders

are cognizant of the utility of continuity, with some micro-level adjustments.^{48,49}

Then there is the more complex case of US-Gulf ties. Both the Gulf states' inability to stop the conflict despite their lobbying efforts and the US' failure to deter an attack on them are clear warning signs. The Gulf states should not over-rely on their ties to Washington as a panacea for their strategic dilemmas. Partnership with the US should be a force-multiplier rather than a replacement for a home-grown security strategy. This is where other GCC states can learn from the UAE, given the latter's ability to balance deep engagement with Washington with relatively advanced local weapons procurement and military education sectors. Simultaneously, the US' decision to go to war despite GCC lobbying illustrates the limits of Gulf hedging strategies. Extra-Gulf actors will always have different visions, capabilities, and threat perceptions and will naturally prioritize their own national interests over local partners. This applies as much to China, Pakistan, Türkiye, and Israel as it does to the US.⁵⁰

Despite their collective push for conflict resolution, the Gulf states must be aware that further instability is likely. They should therefore prepare for the worst. Though critical infrastructure in the Gulf was targeted by Houthi attacks as early as 2017,⁵¹ the Gulf states did not direct sufficient resources to target hardening. This, in turn, allowed Iran to wreak havoc on a larger scale in 2026 with relatively inexpensive Shahed drones. Equally, the Gulf states should prime their populations for the potential of continued conflict. They should also prioritize cheap, locally maintainable anti-drone countermeasures. This is because, in any future conflict, a financially constrained Iran is likely to depend on drones, which are cheaper and easier to manufacture than ballistic missiles. Iran has also proven adept at causing supply chain disruption, which necessitates local insulation.⁵²

The need for sustainable anti-drone countermeasures exemplifies that the Gulf states do not need to spend more on their militaries; they instead need to spend smarter. Some are already world leaders in military spending as a proportion of their GDP.^{53,54} Yet much of this was traditionally spent on high-end purchases of cutting-edge military technology that was never intended to be used and was instead intended to enhance a state's foreign policy prestige. One example is the acquisition of different next generation fighter jets from multiple countries.⁵⁵ Firstly, militaries are at their most effective when they train on a limited number of platforms. Secondly, competing systems are often designed to restrict, rather than enable, interoperability, which the Gulf states can no longer afford. Given their collective reliance on maritime trade routes, they should instead invest in navies and anti-mining capabilities. Rather than one-off purchases from foreign sellers, the GCC states should invest in home-grown military capacity sustainably and over a prolonged period. Defense spending must prioritize operational utility, not foreign policy signaling. There are already signs of the Gulf states

undergoing a shift when it comes to military hardware. For instance, Saudi Arabia, the UAE, and Qatar have agreed on long-term partnerships with Ukraine⁵⁶ focused on cheaper, combat-tested counter-drone systems, air defense, and electronic warfare, suggesting the beginnings of a move from prestige procurement towards operational utility.

Finally, the lack of a Gulf version of NATO or the EU does not preclude the GCC states from on the one hand managing their competition and on the other cooperating to deter any future Iranian attack. The war has generated pan-Gulf anger at Iran's actions and heightened a sense of vulnerability and shared threat perception. Even if the Gulf states profoundly disagree on other geopolitical issues, they can coordinate to deter Iran, lobby Washington to constrain Israel's destabilizing regional actions, and work together to diversify gas and oil pipelines. It is in no Gulf state's interest to allow Iran to exploit intra-regional divides. The GCC states have a long history of issue-based cooperation. Accordingly, a collective response to Iran does not require the creation of an overarching Gulf body that supersedes the authority of each individual state.

CONCLUSION

Grand strategy scholars largely agree that grand strategic change is rare. There are many bureaucratic and path-dependency impediments to change in any state. Equally, there is a logic to continuity: knee-jerk reactions to trauma can undermine a state's interests in the long run. Any potential change varies by degrees that are proportional to the perceived nature and level of the external input that may or may not induce change. The grand strategy scholar Rebecca Friedman Lissner differentiates between grand strategic overhauls and grand strategic adjustments. The former occur when a state adopts a new grand strategy. Adjustments, by contrast, occur when a state alters its statecraft but not its long-term vision of the international order and its place within it.⁵⁷ Similarly, Colin Dueck distinguishes between first-order and second-order changes. First-order changes occur when a state experiences a widespread shift in its "strategic commitments." Second-order changes, such as President Eisenhower's "New Look" policy, entail shifts in a state's means to achieve a desired end, without straying from this end or shifting its grand strategy entirely.^{58,59}

In sum, this paper has argued that the US-Israeli war on Iran will cause each of the Gulf states to adopt a second-order grand strategic adjustment, rather than a wholesale grand strategic overhaul. It does not argue that no policy changes will take place, but that rather than generating a completely new policy direction, the conflict has caused the GCC states to expedite their pre-war policy shifts. There is also a demonstrable need for the Gulf states to reassess their policies; indeed, this paper has provided recommendations on what can or should change. Concurrently, this paper does not

downplay the damage done and trauma felt throughout the GCC states. Instead, it argues that the impediments to grand strategic change are significant. Iran remains a threat, the US remains an ally, and a Gulf version of the EU or NATO remains unlikely. This is why, though the Gulf states have individually and collectively faced trauma, a grand strategic transformation is unlikely to take place.

About the Author



Dr Rob Geist Pinfold is a Lecturer in International Security at King's College London, an Adjunct Professor at Johns Hopkins School of Advanced International Studies (SAIS), and a Senior Non-Resident Fellow at the Gulf International Forum and the Peace Research Center Prague. He is a scholar of grand strategy, with a regional focus on war and contemporary conflict in the Middle East. He has published in multiple academic journals, including the *European Journal of International Security*, the *Journal of Global Security Studies*, *Survival*, *International Studies Perspectives*, the *Journal of Strategic Studies*, and *Studies in Conflict & Terrorism*. His last book, *Understanding Territorial Withdrawal: Israeli Occupations and Exits*, was published by Oxford University Press in 2023. He also writes regularly for policy and media outlets, including *Foreign Policy*, *War on the Rocks*, *Haaretz*, *The New Arab*, *Arab News*, and the *New Statesman*, and provides commentary for international broadcasters including Al Jazeera, France 24, RTÉ, CNBC, and the BBC.

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Author: Dr Rob Geist Pinfold
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