

The Gulf States and a US–Iranian Confrontation

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The possibility of a military confrontation between the United States and Iran poses weighty dilemmas for the Gulf states. On the one hand, they fear Iranian attacks on energy facilities, water-desalination plants, and US bases on their territory, as well as on oil and gas export routes from the Gulf. On the other hand, they are concerned about the consequences of a collapse of the Iranian regime, whose patterns of behavior are well known. From their perspective, a weakened and restrained Iranian regime is preferable to potential chaos. Worse still, the fall of the regime and the long-term emergence of a democratic system in its place could inspire protests in Arab states. The Gulf states are urging the United States to reach an agreement with Iran because they seek a change in Iran’s policy toward them and an end to its nuclear and missile programs. However, they are not convinced that American–Israeli military action would achieve these outcomes. In any case, the Gulf states cling to an image of neutrality and act as intermediaries between the belligerents to reduce being caught in the crossfire.

After more than a month of mass protests in Iran, which the regime harshly suppressed—and as the United States considers military and political options toward Tehran—the six Gulf states, Iran’s immediate neighbors, are watching with apprehension. Since the outbreak of the protests in Iran, the leaders of the ruling monarchies have refrained from publicly commenting on the issue and from taking steps that could be interpreted as identifying with either side. In practice, they fear both Iranian actions that could harm their territory and interests, as well as the undesirable consequences, from their perspective, of a collapse of the Iranian regime.

The Threat Landscape

1. Iranian aggression

Since the confrontation involving Israel, the United States, and Iran in June 2025, the Gulf states have been preparing for another round of confrontation while accelerating efforts to strengthen their defensive capabilities. They emerged from the June 2025 confrontation with relative success: Iran’s nuclear and missile programs sustained damage, while the Gulf states themselves were not attacked, apart from a symbolic Iranian strike on the al-Udeid base in Qatar. Moreover, energy exports from the Gulf—their main source of income—were not disrupted.

The Gulf states’ primary short-term concern is a potential Iranian response targeting strategic infrastructure on their territory, including oil and gas production facilities, symbols of governance, desalination plants, and military bases, particularly those hosting US forces. Another major concern is Iranian action to disrupt shipping lines near the Strait of Hormuz, through which roughly a quarter of global oil and gas traffic passes.

In addition, any harm to Iran would also affect the economies of the Gulf states that maintain trade relations with it, especially the United Arab Emirates, Iran's principal trading partner in the Middle East. The Iranian strike on Qatar in June 2025 was a reminder of the vulnerability of infrastructure in the Gulf, even though Iran reportedly provided advance warning. Indeed, reports indicated that Iran conveyed messages to its Gulf neighbors urging them to persuade the United States to refrain from attacking Iran, while warning that such an attack would trigger retaliation against military bases on [their territory](#). Moreover, Iran could also activate its regional proxies—by pressuring the Houthis not only to target Israel but also to renew disruptions to freedom of navigation in the Red Sea and potentially even carry out strikes against the Gulf states themselves.

2. Regime collapse

Just as an Iranian strike against targets in the Gulf states constitutes a tangible threat, the Gulf states also fear that a US campaign in Iran could precipitate a rapid collapse of the regime in Tehran. They do not view the swift fall of the Islamic Republic as a desirable outcome as it could trigger widespread instability, including succession struggles within Iran, the disintegration of governing institutions, the empowerment of extremist actors, potential waves of refugees, and, above all, the loss of a clear address for crisis management.

Accordingly, the Gulf states prefer a weakened Iran whose policies are more moderate, especially by curtailing its nuclear and missile programs and its [negative](#) regional activities. In recent years, the Gulf states have taken significant steps to improve relations with Iran as part of a policy of détente, which, in their view, has proven effective. From their perspective, “the devil they know” is preferable to the instability that could spill over into the Gulf, generate waves of refugees, and disrupt trade. The Arab Spring may also serve as a reference point, demonstrating that regime collapse does not necessarily bring clarity and stability but rather prolonged [instability](#).

Iran is a known actor; its red lines, internal constraints, and regional patterns of behavior are familiar. By contrast, a post-Islamic Republic Iran—especially one emerging from a protest movement that is not monolithic—could be far less predictable. Furthermore, the monarchies in the Gulf states fear a “contagion effect,” namely the possibility that the collapse of the Iranian regime and the emergence of a democratic-liberal political system in its place would inspire waves of protest in the region (as could have occurred following the 2009 protests in Iran and the subsequent development of the Arab Spring). Finally, the fall of the Iranian regime could also lead to a dramatic shift in the regional balance of power and a significant strengthening of Israel. Iranian hostility toward Israel, even at the rhetorical level, helps preserve a familiar equilibrium.

Iran's continued advances in the missile domain alter the strategic balance of power to the detriment of the Gulf states, posing a concrete threat to oil fields, ports, desalination facilities, and coastal cities. At the same time, this very threat is the principal reason for the Gulf states' caution. Unlike Israel, the Gulf states are geographically very close to Iran and possess more limited military capabilities. Most of their population, economy, and infrastructure are concentrated along narrow coastal strips exposed to the Gulf shoreline. They experienced firsthand Iran's missile and drone attack on Saudi Aramco facilities in 2019 and drew a simple lesson: Even a “limited” Iranian response can be devastating. In line with this threat

perception, several Gulf states reportedly are acting to [prevent](#) a US military strike on Iran through the following measures:

- A. Mediation and facilitation**—The Gulf states oppose a US strike on Iran not because they believe such a move would be unjustified in principle but rather because they are convinced that they would bear the immediate cost. Their opposition may also reflect the concern that the attack plans would not, in their view, produce the desired outcomes. Accordingly, behind the scenes, Saudi Arabia, together with Oman and Qatar, has led quiet efforts to persuade Washington to avoid military intervention, warning that regime collapse or military escalation would shake oil markets and endanger their stability. Reports indicate that Riyadh, Muscat, and Doha have [focused](#) on preventing the use of escalatory rhetoric and military steps that could lead to miscalculation and escalation. Strikes against the Gulf states using missiles, drones, maritime sabotage, or regional proxies are readily available and familiar options for Iran.

For the Gulf states, a US–Iranian confrontation constitutes a direct threat to their internal, economic, and security stability. Mediation, therefore, is a defensive tool from their perspective—an attempt to keep the battlefield away from Gulf territory, even if this does not resolve the root causes of the confrontation. It is also possible that reports about efforts to prevent a US strike are intended to allow time to improve defensive preparedness with US assistance, particularly against missiles. In any case, the image of the Gulf states as opposing a strike against Iran and seeking to prevent it serves their interest in easing tensions between themselves and Iran.

- B. Adoption of a neutral stance**—Against the backdrop of US threats to strike Iran, several Gulf states have conveyed messages indicating their intention not to intervene. Saudi officials reportedly sent direct messages to Iran stating that the kingdom would not take part in a confrontation and [would not allow](#) US forces to use its airspace for an attack. These expressions of neutrality reflect a shift in the Gulf states’ security perceptions. Unlike in the past, when some believed that a US–Iranian confrontation would help mitigate the Iranian threat, there is now recognition that such a confrontation would leave them more exposed. Accordingly, neutrality—alongside a preference for a diplomatic-political solution over military confrontation—has emerged as a pragmatic course adopted by the Gulf states, aimed at reducing the likelihood that the Gulf will become a theater for Iranian retaliation.

At the present juncture, there is a clear preference among the Arab Gulf states for diplomacy and a political solution instead of confrontation, in order to prevent broad escalation that would undermine their security and economic development. From their perspective, the desired outcome is a US–Iranian agreement that would curtail Iran’s hostile regional activity and limit its nuclear and missile programs.

The policy of regional détente adopted by the Gulf states in recent years does not stem from illusions about the nature of the Iranian regime but rather from recognition of Iran’s superiority over them. Indeed, to date, détente has proven effective in preventing Iranian aggression against them. This approach also explains their silence regarding the wave of protests in Iran. The Gulf states have almost entirely refrained from voicing public criticism of

the regime, and the few officials who did speak were careful to avoid direct reference to Iran's brutal suppression of the protests or to possible US military action against Iran. Tehran could perceive open encouragement of regime change as hostile interference, particularly when it is far from clear whether the protests will lead to the regime's fall. The limited statements that were made were intended [to signal](#) to Iran that the Gulf states were not complicit—that is, they were not involved in US military preparations—and that Iran could avert an attack by halting its nuclear program and changing its regional policy.

The Gulf states' perception of vulnerability underpins their preference for a weakened and restrained Iran: one preoccupied with internal problems but not attacked, not rallying around the flag, and not driven by a desire for revenge amid regional chaos. Accordingly, the Gulf states are working to strengthen direct communication channels with Tehran and to coordinate positions among themselves while also conveying messages to third parties (possibly including Israel) in an effort to build a broad consensus against military escalation. In addition, the lack of public engagement with the issue may also reflect an attempt to redirect the domestic public discourse toward socioeconomic matters. The Gulf policy taking shape against the backdrop of a possible US–Iranian confrontation is not merely an effort to “appease” Iran but rather an attempt to shape a regional environment in which the Gulf states will not be forced to choose between their relationship with the United States and their own survival.

How would the Gulf states behave if a confrontation were to erupt? It is likely they would act as they have in previous confrontations. As long as the Iranian regime poses a threat to their security and stability, the Gulf states will remain cautious and seek to maintain workable relations with it as much as possible. Accordingly, it is reasonable to assume that they would condemn an attack on Iran—especially if carried out with Israeli involvement—while promoting de-escalation and simultaneously cooperating behind the scenes to detect and intercept Iranian missiles and aircraft as part of their affiliation with US Central Command.

In short, the Gulf states prefer a weakened, restrained, yet functioning Iran over a wounded, enraged, and unpredictable one. For Washington and Jerusalem alike, this is an important lesson. The Gulf states act primarily according to a logic of stability, survival, and economics. Those who ignore this logic may not only misinterpret their positions but also underestimate the regional cost of a hasty military move. It is important for Israel to recognize that any military action vis-à-vis Iran must also take into account the interests and concerns of the Gulf states. A scenario in which Iran is weakened through an agreement that restricts its nuclear and missile programs would be preferable for Israel as well to a rapid collapse of the regime, the consequences of which are unpredictable.

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