

The War with Iran from the Perspective of the Gulf States

Yoel Guzansky and Ron Tira | No. 2128 | April 16, 2026

The war between Iran, the United States, and Israel has not, so far, improved the strategic position of the Gulf states; in fact, it may have even worsened it. Despite the damage Iran has sustained, the regime has demonstrated resilience while preserving key levers of pressure—namely, the ability to disrupt shipping through the Strait of Hormuz and to strike “bypass” pipelines and land-based critical infrastructure in the Gulf states. At the same time, in the eyes of the Gulf states, the war has sharpened the limitations of the US security guarantee. As a result, and given the absence of optimal alternatives, they are likely to continue a hedging strategy: maintaining reliance on the United States, deepening military self-reliant buildup (especially missile and UAV defense), alongside diversifying regional and international partnerships and attempting to reduce tensions with Iran.

It is too early to summarize the implications of the war between Israel and the United States and Iran, as negotiations between the United States and Iran have not yet concluded and the ceasefire may be ongoing. Fighting could also resume and even escalate. In general, a time perspective is required to assess the outcomes of a war and certainly a regional war with global implications. Nevertheless, this article offers a preliminary assessment of the war at this stage of the ceasefire and its implications from the perspective of the Gulf states.

The Strategic Context

The US guarantee of the security of the Gulf states has been the cornerstone of the regional order since the second half of the 20th century. Against this backdrop, the dominant political-strategic camp in the Middle East has been the pro-US camp, which has served as the primary stabilizing force in the region. In recent years, however, this regional order has been challenged in several ways, including by growing doubts about the extent of US commitment to Gulf security; attempts by other powers—particularly China—to increase their influence in the region; intensified Iranian and political Islamist efforts to expand regional influence; and, to a certain extent, attempts by some of the states to pursue more self-reliant strategies. These challenges have led some Gulf states to adopt a diversification approach,

strengthening security ties with other countries such as China, as well as with regional actors like Pakistan, alongside efforts to thaw relations with Iran in order to reduce tensions.

The war between Israel, the United States, and Iran has sharpened some of these tensions and may accelerate processes that could challenge the clear alignment of the Gulf states within the pro-US camp. At the time of the ceasefire, Iran has succeeded in implementing its dual strategy in the Gulf: both disrupting freedom of navigation in the Strait of Hormuz and conducting attacks that damage energy and other land-based critical infrastructure in the Gulf, signaling the potential for further escalation and undermining their ability to continue exporting oil and gas. The emerging perception is that the United States has struggled to neutralize this threat—neither through direct measures (such as reopening the straits, deploying effective missile defense, targeting launchers, and suppressing Iranian strike capabilities) nor through indirect means (applying sufficient pressure on the Iranian state and regime, including regime change). From the perspective of the Gulf states, the path to a ceasefire does not lie in imposing US terms on Iran but rather in an American attempt to mitigate the dual threat facing the Gulf through negotiated arrangements, reflecting a view that military measures have essentially failed, even if this entails partially abandoning the war's objectives.

Although the (second) Iran war inflicted significant damage on the Iranian regime, economy, and military capabilities, the regime demonstrated considerable resilience in the face of both external and internal threats, effectively proving its ability to withstand a combined assault by the world's most powerful state and Israel. Replacement leadership emerged quickly after decapitation, most ballistic launch systems remained concealed or survived in tunnels, and the UAV array remained effective and threatening. It is still unclear what will become of Iran's stockpile of uranium enriched to 60% and the centrifuges stored underground. This means that the damage Iran sustained did not deprive it of its key pressure levers, including the ability to disrupt navigation in the Strait of Hormuz, to inflict even greater harm on the Gulf states, and to maintain armed regional proxies. Taken together, these levers constitute a strategic tool that may allow Tehran to exert pressure in the future across a range of contexts. If Iran perceives itself as having achieved a degree of success and retains significant elements of power, given the effectiveness of its leverage over the Gulf and the inability to neutralize it, it may feel more immune to future attack.

Moreover, once the war ends, the US appetite—under the Trump administration or future Republican or Democratic administrations—for another military confrontation with Iran may decline. This, combined with the possibility that Iran may conclude that war with the United States and Israel is severe but “not the end of the world,” could expand Iran's freedom of action and constrain efforts to restrain it in the Gulf and beyond.

The Gulf States in the War

Over the years, the Gulf states have invested considerable resources in procuring advanced defense systems, strengthening security ties with the United States, and deepening regional cooperation. At the same time, they have worked to improve relations with Iran in order to hedge risks and reduce the likelihood of escalation, thereby lowering Iranian incentives to target them. Some entered the war reluctantly, some even opposing a strike on Iran—not because they doubted its justification, but because they correctly anticipated that the war would exact a heavy price from them. Nonetheless, in general, there was a gap between their public diplomacy, which expressed opposition to the war, and the behind-the-scenes pressure some exerted to continue the war until the regime was destabilized—or at least until its capabilities were significantly degraded and the threat to them removed.

The war with Iran indeed placed the Gulf states at the center of the conflict against their will. Iran identified them as a lever to pressure the United States to shorten the duration of the campaign. Nevertheless, despite Iranian strikes on their territory, the Gulf states refrained from openly joining the war and adopted a cautious policy: After being attacked, they allowed other forces to operate from their territory and, according to various reports, undertook limited offensive actions that could be plausibly denied. This approach reflected their concern over intensified Iranian retaliation, alongside uncertainty regarding US war objectives and the likelihood of achieving them—in other words, they constantly calibrated their actions in light of the realistic possibility that they would continue to coexist with the current Iranian regime in the future. The ceasefire was received in some Gulf states with relief because the attacks against them ceased but not with a sense of achievement. The end of hostilities does not resolve the issues that led to the war and may even leave them in a more complex strategic position than before. A key question for them concerns the status of the Strait of Hormuz and the lack of clarity regarding Iran's future role there.

At the same time, the Gulf states are not a monolithic bloc. The war highlighted significant differences among the six Gulf states regarding the appropriate approach toward Iran and the conduct, objectives, and duration of the campaign. These gaps complicated efforts to formulate a unified Gulf policy, undermined the ability to isolate Iran, and hindered efforts to gain consensus for actions against it. Oman maintained the most open relations with Iran, did not act against it, and may even be viewed by Iran as a potential partner in monitoring and overseeing traffic through the Strait of Hormuz. In contrast, the United Arab Emirates—the state most heavily attacked by Iran (according to Emirati claims, [until the ceasefire, they had intercepted 537 surface-to-surface missiles, 26 cruise missiles, and 2,256 UAVs](#))—adopted the most hawkish and unequivocal stance. Bahrain attempted to pass a UN Security Council resolution under Chapter VII (which permits the use of force), while Saudi Arabia pursued a risk-hedging policy: [despite its public support for the US campaign](#) and allowing offensive operations from its territory, it refrained from overtly joining the attack, acted cautiously in public diplomacy, and [maintained ongoing dialogue with Iran to prevent escalation](#). Kuwait sided with the United States and suffered heavy attacks, while Qatar, as is its custom, pursued a seemingly contradictory policy: It allowed the United States to operate from its territory while simultaneously attempting to mediate between Iran and the United States.

For its part, Iran attacked all Gulf states—albeit to varying degrees, at different times, and sometimes amid internal disagreements between its political and military leadership over the policy of fire toward the Gulf states ([which even led to a public apology by Iranian President Masoud Pezeshkian](#)). In general, as Iranian attacks on Gulf territory intensified, the Gulf states hardened their rhetoric against Iran and began, in cooperation with the United States, to take various low-signature military actions against it—yet even this did not lead them to declare war on Iran or sever diplomatic relations.

A partial explanation for the Gulf states' conduct during the war lies in their assessment that the Iranian regime would survive. In their view, an overt military response against Iran would not have stopped the attacks, would not have yielded meaningful military gains, and, above all, would have intensified Iranian retaliation and jeopardized the possibility of returning to a policy of détente. Therefore, with the exception of the UAE, they avoided unequivocal alignment with the United States and its declared war objectives and preserved plausible deniability regarding their military actions. Some sought to avoid burning bridges with Tehran, understanding that they would need to continue living alongside it after the war—possibly when it is even more dangerous.

The Gulf States' Problem of Alternatives

At first glance, the strategic context should compel the Gulf states to reassess their position regarding the US security guarantee and the implications of the war for regional policy, strategy, and even the structure of political camps in the Middle East. However, their problem is the absence of good alternatives. There is no other global power capable of protecting the Gulf states, and China and Russia lack either the political will or the military capability to influence the arena as the United States does. As has been demonstrated, alliances with regional military powers—Pakistan and Turkey—are more a matter of public diplomacy than of real security protection; indeed, Pakistan’s guarantee to Saudi Arabia and the Turkish base in Qatar had no impact on Iranian decision-making or use of force.

Israel has demonstrated impressive power-projection capabilities in Iran and deployed a volume of aerial munitions similar to that of the United States, yet it is difficult to envision a scenario in which Israel serves as the guarantor of Gulf security. First, it is doubtful that Israel could succeed where the United States struggled—ensuring freedom of navigation in the Gulf and defending Gulf energy infrastructure. Second, Israel is widely perceived as having driven the United States into a war whose cost to the Gulf states was high while its achievements were modest and thus as a factor contributing to instability and one whose judgment is questionable (continuing concerns about Israeli prudence raised after the September 9, 2025, strike in Qatar). Third, Israel’s policy during the “Swords of Iron” war, its stance on the Palestinian issue, and the absence of a clear regional vision raise doubts among Gulf states about the benefits of expanding cooperation with it.

Moreover, despite extensive procurement of advanced military systems, the Gulf states’ capacity for independent security remains limited, and it is doubtful whether they collectively or individually are currently capable of conducting high-intensity warfare against a regional power on Iran’s scale. They certainly cannot expect to achieve a more successful outcome than the United States in addressing Iran’s dual challenge in the Strait of Hormuz and in defending critical infrastructure in the Gulf.

A central question is whether the Gulf states will alter their hedging strategy following the war. It is possible that the survival of the Iranian regime and its retention of key elements of power (nuclear and missile capabilities), if maintained after the war, will lead the Gulf states to conclude that their strategic environment has not fundamentally changed. Accordingly, they may revert to a risk-hedging policy aimed at reducing the likelihood of another confrontation with Iran—and, if one occurs, minimizing the damage they sustain—while increasing investment in defense and diversifying regional and international partnerships. Some Gulf states believe that the United States entered the conflict despite their reservations, failed to deter attacks against them, failed to stop those attacks, and ultimately pursued a ceasefire while leaving significant uncertainties unresolved. Yet hedging and détente with Iran are themselves problematic alternatives: It is difficult to achieve an enduring stable diplomatic equilibrium between a Shiite regional power seeking to export its revolution and viewing the Gulf as its sphere of influence, and vulnerable but wealthy Sunni states.

At the same time, the war underscores the need to bypass the bottlenecks of the Strait of Hormuz and Bab el-Mandeb by developing overland energy transport solutions, particularly pipelines to the Arabian Sea and the Red Sea—an issue recognized even before the war and already under preparation. However, even if such additional pipelines are built—a process that would take many years and significant investment—Iran could also target them, making them, to a considerable extent, another bottleneck. Moreover, they would not solve the problem of Iranian strike capabilities against land-based infrastructure, nor all the challenges of maritime transport for all critical goods, although they would alleviate some of the maritime transport challenges in the energy sector.

In conclusion, as the Gulf states conduct an interim assessment of the war, the outcome they see is likely negative. The results so far have not justified, in their view, the heavy price they have paid and may yet pay. Since none of the available alternatives is optimal, they are likely to pursue a familiar policy combining military buildup—including missile and UAV defense—continued reliance on the United States, due to the absence of better options, and efforts to diversify partnerships, alongside attempts to reduce the level of confrontation with Iran, which has demonstrated both its capacity for harm and the lack of a safer alternative for dealing with it.