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Gulf Insights

Is a Post-American Gulf Possible?

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Is a Post-American Gulf Possible?[1]

Simon Coppieters

The disruptive character of the second Trump administration's foreign policy is not, in itself, a new feature of U.S. behaviour in the Gulf or vis-à-vis the GCC states. Rather, the U.S.-Israeli attack on Iran on 28 February 2026, and the regional war that followed, merely offered the latest and most destabilising reminder of a longer-standing pattern: Washington has repeatedly taken major decisions affecting Gulf security either without (full) GCC consultation or in ways that left Gulf states exposed to the consequences of escalation, regardless of whether or not they supported the initial move. The 2015 nuclear deal with Iran generated unease across much of the Gulf, whereas Trump's withdrawal from it in 2018 was welcomed by Saudi Arabia, the UAE, and Bahrain. Yet in both cases, the central point remained the same: decisions of fundamental strategic consequence were made in Washington, with Gulf actors left to absorb their regional fallout.

That pattern has since repeated itself. The muted U.S. response to the 2019 strike on Saudi oil infrastructure, linked to Iran, and the sense of insufficient reassurance after the 2022 Houthi attacks on Abu Dhabi both fed doubts in the Gulf about the reliability and priorities of American protection. The apparently calibrated Iranian strike on Al Udeid, in Qatar, at the end of the June 2025 Twelve-Day War, Israel's September 2025 strike in Doha, and now the far wider 2026 regional war, in which Iran has struck all GCC states after the 28 February U.S.-Israeli offensive, have only reinforced the same lesson: the Gulf remains deeply dependent on the United States for its security, yet also acutely vulnerable to the escalatory consequences of American (and Israeli) choices over which GCC capitals exercise only limited influence.

What about increased intra-GCC cooperation as an alternative?

Dr. Majed Al Ansari, Qatar's Foreign Ministry spokesperson, has stressed that communication among GCC officials is ongoing and the current diplomacy is accompanied by defensive coordination. However, collective defence in the Gulf is likely to remain more aspirational than operational. The idea as such is not merely rhetorical. It is formally embedded in the GCC's 2000 Joint Defence Agreement and in the

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Peninsula Shield framework. Yet these mechanisms have not produced a genuinely integrated and autonomous Gulf collective-defence system.

The 1990-91 Iraqi invasion of Kuwait brought the Gulf monarchies closest to a shared external security crisis. Yet that moment did not produce an autonomous GCC collective-defence model. Although several Gulf states participated in Kuwait's liberation, they did so within a U.S.-led international coalition rather than through an independent GCC military architecture. Nor did subsequent episodes fundamentally alter this pattern. The 2011 intervention in Bahrain, for instance, demonstrated that Gulf states could coordinate in support of a fellow monarchy facing internal unrest, but it did not resolve the GCC's longer-standing inability to translate shared insecurity into an integrated regional security system. Part of the problem was that the threats confronting the Gulf were never fully fixed or jointly defined. Iran, Iraq, Yemen, and other Arab political forces were all viewed at different times as sources of danger; however, these concerns did not coalesce into a more coherent and autonomous common defence framework. Moreover, intra-GCC tensions should not be discounted. The recent Saudi-Emirati spat over Yemen may be temporarily subdued. However, it could re-emerge in the post-conflict period as a spoiler to any renewed push for Gulf security integration.

Additionally, further rounds of confrontation among Israel, Iran, and the United States appear plausible. Tehran has now demonstrated a willingness to operationalise the Strait of Hormuz and to strike GCC states directly as part of a broader war of (economic) attrition, thereby holding not only the Gulf, but also a significant part of the global economy, hostage to disruption. In that sense, the Strait of Hormuz is not merely a Gulf security issue, but a strategic vulnerability of international consequence. For the GCC states, however, this also reinforces a familiar reality: their reliance on external security partners, be it for protection of strategic infrastructure or, in this case, critical sea lanes is likely to endure.

What about China or Russia as an alternative?

Any possible GCC move toward overt or covert engagement with China and Russia should not be overstated. Given Gulf states' continuing reliance on U.S. and European weapons systems, training, maintenance, and interoperability, such outreach should be understood as political signalling, and not as a genuine effort to deepen ties, nor pursue strategic partnerships, with Moscow or Beijing.

China has indeed broadened security ties with Gulf partners such as Saudi Arabia, the UAE, and Kuwait, while maintaining its only overseas military base in Djibouti. However,

selective defence cooperation is not the same thing as being willing to assume a wider strategic role in Gulf security. Beijing continues to favour influence without entanglement, leaving the burdens and costs of deterrence and regional defence to the U.S. Its conduct during the current war has only reinforced that point. Although China has called for de-escalation and opposes attacks on all states in the Gulf, it has shown neither the political will nor the operational readiness to assume responsibilities comparable to those long carried by Washington. More importantly, nor is there much to any evidence that GCC states expect Beijing to assume one. Hence China's regional role is currently set to most likely remain limited and transactional.

Regarding Russia, one can reasonably question the country's credibility as a security partner. Russia once demonstrated in Syria, in 2015, that it could intervene decisively to preserve an ally. However, since its full-scale invasion of Ukraine in 2022, Moscow has appeared far less able, or willing, to support embattled partners. The clearest treaty-based example is Armenia. The Russia-led CSTO failed to provide meaningful protection in 2022 during Yerevan's conflict with Baku. Even in Nagorno-Karabakh in 2023, where Russia had peacekeepers on the ground, Moscow did not prevent Azerbaijan's offensive or the collapse of the enclave. Nor did the Kremlin save Assad in the lead up to the fall of his regime in 2024, beyond granting him asylum in Moscow. More recently, Russia did little beyond protesting, when the U.S. abducted Venezuelan President Maduro in early 2026.

Iran offers another clear example in place: despite the 20-year Comprehensive Strategic Partnership signed between Moscow and Tehran on 17 January 2025, Russia has stopped short of acting like a treaty-bound ally, also because the agreement contains no mutual defence clause. For Gulf states weighing external security partners, that record hardly inspires confidence in the Russian Federation as a dependable alternative to Washington. Also, reports that Moscow may have shared intelligence and military technology with Tehran to aid targeting of U.S. assets in the Middle East, combined with Iranian strikes on both U.S. and non-U.S. targets in GCC states, do little to strengthen Russia's case as a credible and desirable security partner. In fact, Ukraine has emerged as a more useful *ad hoc* security partner. Ukrainian teams are already present in Qatar, Saudi Arabia, and the UAE, helping those states defend against Iranian Shahed-type drone attacks. In this context, President Zelensky visited most recently in the Gulf region. During that tour, Ukraine signed defence cooperation agreements with Qatar, Saudi Arabia and the United Arab Emirates.

The current war underwrites the Gulf's future need of the U.S.

The ostentatious push for regime change in Iran has unfolded without much indication that Washington or Tel Aviv has a credible plan to achieve it, besides inflicting maximum destruction. Although the U.S.-Israeli air campaign is vast in both scope and reach, and significantly degrades Iranian military and non-military infrastructure as well as elements of the state's coercive capacity, it is unlikely to produce regime change, especially in the absence of a ground component. Any attempt to introduce such an element, whether through U.S. boots-on-the-ground or through the mobilisation of ethnic minority armed groups such as Kurdish or Baluchi factions, or the triggering of another popular uprising during or after the military campaign, would carry profound uncertainty regarding both its operationalisation as well as eventual outcome. Rather than bringing about any apparent orderly transition in Tehran, it would more likely generate additional heightened instability inside Iran and across its immediate neighbourhood. For the GCC states, such a scenario would mean an even more volatile and unpredictable environment.

Likewise, the latest round of war against Iran may strengthen those in Tehran who argue for crossing the nuclear threshold. More immediate dangers for the Gulf, however, may lie in a broader spectrum of spillover effects. A severely weakened or internally destabilised Iran could become not only more radical and vengeance-driven, but also a source of intensified maritime disruption, proxy activity, cyber pressure, and border insecurity. For the GCC monarchies, the menace is therefore not the risk of an eventual Iranian bomb, but the prospect of a wider and more disorderly regional threat environment. That, in turn, gives them strong reason to preserve the U.S. security umbrella while also investing more seriously in their own resilience across air and missile defence, maritime security, cybersecurity, and border protection.

The U.S. remains irreplaceable

The GCC is not about to cast off its U.S. security umbrella anytime soon, least of all in the post-bellum phase of the ongoing Israel-U.S. war against Iran. The preceding discussion points in a clear direction. Intra-GCC defence cooperation remains too limited and politically fragmented to provide an autonomous substitute. China and Russia, for different reasons, do not offer credible alternatives as external security guarantors. Meanwhile, the prospect of a weakened, more disorderly, or more radical Iran only reinforces Gulf threat perceptions rather than easing them. For all the frustration Gulf states may harbour toward Washington, the United States remains

the indispensable backbone of the regional security order. For the foreseeable future, the answer to the question posed here therefore remains no: what lies ahead is not a post-American Gulf, but at most a more layered Gulf security order still anchored in U.S. power. Within that order, GCC states may continue to pursue limited diversification of their security partnerships, but plausibly with European NATO members and other established U.S.-aligned partners.

Thus, recent military assistance to the Gulf does not point to the emergence of an alternative security umbrella, but to an incremental consolidation of a more layered, U.S.-anchored one. The UAE already fields multiple non-U.S. air-defence systems, including Israeli and South Korean platforms. Since the outbreak of the war, Australia has deployed a highly advanced airborne early warning and control aircraft and supplied air-to-air missiles to the UAE. The United Kingdom has reinforced Qatar with additional Typhoon jets, as part of the joint UK-Qatar Typhoon Squadron, that are also actively contributing to the defence of additional GCC states, including Bahrain. France has deployed Rafale jets in support of the defence of UAE airspace, while Italy has indicated its readiness to provide air-defence assistance to Gulf states under attack.

Türkiye appears to present a contrast. Although it remains an important defence partner for Qatar, and its military presence was a pivotal deterrent at the outbreak of the Gulf Crisis in 2017, there has, at least so far, been little to no public indication that the Turkish military contingent present in Qatar has played a meaningful operational role in defending Doha against Iranian missile and drone attacks, whether during the June 2025 12-Day War or in the current round of hostilities. However, this should not be read too quickly as evidence of Turkish passivity, since the deployment in Qatar was not originally conceived primarily as a dedicated response to missile and drone threats.

Taken together, these developments do not indicate that the GCC is moving beyond the U.S. security umbrella. Instead, they point to a gradual thickening of a wider U.S.-plus security architecture in which secondary actors, these being NATO allies and NATO partner countries, such as South Korea, Australia, and Ukraine, contribute to reinforce specific operational elements while Washington remains the indispensable backbone of the regional security order. In that respect, it is notable that Kuwait, Bahrain, Qatar, and the UAE all participate in NATO's Istanbul Cooperation Initiative, giving this evolution a modest institutional anchor beyond *ad hoc* military cooperation.

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