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POLICY BRIEF

THE GULF SECURITY TRAP:

Dependence, Rivalry, And Collective Resilience

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THE GULF SECURITY TRAP: DEPENDENCE, RIVALRY, AND COLLECTIVE RESILIENCE

External security guarantees, regional fragmentation, and the future of Gulf deterrence

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On 28 February 2026, the United States and Israel launched coordinated strikes against Iran's nuclear, ballistic-missile and air-defence infrastructure. The opening campaign killed Iran's Supreme Leader, Ali Khamenei, along with much of its senior political and military leadership[1]. The United States described this as a decisive blow. However, Iran retained enough command, missile and drone capability to sustain months of retaliation across the region, striking military installations and critical infrastructure in Gulf Cooperation Council (GCC) states and Israel alike. The war exposed a structural contradiction at the heart of Gulf security: The United States remains the one external power capable of defending the GCC at scale, but the bases and installations through which that protection is delivered are themselves what make Gulf territory a target once the United States chooses to initiate hostilities. US forces are deeply embedded across the region: Al Udeid in Qatar is the largest US base in the Middle East. Naval Support Activity Bahrain hosts the US Fifth Fleet, and facilities across Kuwait, Saudi Arabia and the UAE host US military personnel. According to reports, Iranian strikes left the Fifth Fleet's Bahrain headquarters only partially operational, with repair costs estimated at nearly $400 million[2], and a separate strike damaged five US refuelling aircraft at Prince Sultan Air Base in Saudi Arabia[3]. The architecture that provides extended deterrence in peacetime thus increased exposure in wartime. Iran also used its geography to extend the costs of the war well beyond the battlefield: disruption in the Strait of Hormuz, through which roughly 20 million barrels of oil and refined products moved each day, about a quarter of global seaborne oil trade, and the advance of Iran-aligned Houthi forces toward Bab el-Mandeb threatened two of the world's most important maritime corridors at once, driving up energy and shipping costs globally[4]. The task now facing GCC governments is not incremental adjustment but a fundamental reassessment of a security architecture that, for decades, has rested almost entirely on a single external guarantor.

The Cost Of Defence: Asymmetric Warfare And The Limits Of Air Defence

Wars are ultimately constrained by a simple logic: they cost money, and modern warfare consumes billions in advanced munitions and military assets. Without a coherent strategy linking military operations to political objectives, overwhelming firepower risks becoming an exercise in expenditure. Iranian missiles and drones are cheap to build and relatively easy to replace. The interceptors used to stop them are not, and that asymmetry was the war's clearest lesson. Shahed-series drones are estimated to cost in the tens of thousands of dollars to produce, compared with more than $3 million for each Patriot interceptor fired at one[5]. Saudi Arabia alone is estimated to have expended as much as 86 percent of its pre-war PAC-3 interceptor inventory in the first weeks of the conflict[6], and officials elsewhere in the GCC have pointed to a comparable, if less precisely quantified, drawdown of their own Patriot and THAAD magazines, underlining that the interceptor shortage was a bloc-wide exposure. The

[1] "Iran's Supreme Leader Khamenei Killed in His Office, State Media Confirm," Khaleej Times, February 28, 2026, https://www.khaleejtimes.com/world/mena/iran-supreme-leader-khamenei-killed-us-israel-strikes.

[2] "Damage to US Navy Base in Bahrain from Iranian Strikes Estimated at $400 Million, Pentagon Reviews Regional Force Posture," The Defense News, June 26, 2026, https://www.thedefensenews.com/Damage-to-US-Navy-Base-in-Bahrain-From-Iranian-Strikes-Estimated-at-400-Million-Pentagon-Reviews-Regional-Force-Posture/.

[3] "Iran Missile Strike Damages Five KC-135 Tankers in Saudi Arabia, Officials Say," Defense News, March 16, 2026, https://www.defensenews.com/news/your-military/2026/03/16/iran-missile-strike-damages-five-kc-135-tankers-in-saudi-arabia-officials-say.

[4] International Energy Agency, "The Strait of Hormuz Factsheet," IEA, https://iea.blob.core.windows.net/assets/760ed8e8-38b6-4418-b527-6d8976da72e4/StraitofHormuzFactsheet.pdf.

[5] Farah Stockman, "Iran's Drones Cost a Fraction of the US Weapons Shooting Them Down," New York Times, March 4, 2026, republished in The Spokesman-Review, https://www.spokesman.com/stories/2026/mar/04/irans-drones-cost-a-fraction-of-the-us-weapons-sho/.

[6] "Iran Missile War Drains 65% of US Patriot Arsenal as Saudi PAC-3 Stockpile Falls 86%, Exposing Global Air-Defence Crisis," Defence Security Asia, August 8, 2026, https://defencesecurityasia.com/en/iran-war-us-patriot-missile-shortage-saudi-pac-3-stockpile/.

damage went beyond interceptors themselves: Iranian strikes destroyed a US AN/TPY-2 missile-defence radar in Jordan, a system that costs roughly $250–300 million and of which only sixteen have ever been built, and damaged Qatar's AN/FPS-132 early-warning radar and other sites in the UAE and Saudi Arabia[7]. Radar losses matter as much as interceptor expenditure, since without tracking data even a full magazine of interceptors cannot engage an incoming threat, and the solution to either shortage is years away. In January 2026, the Pentagon signed a seven-year agreement with Lockheed Martin to more than triple annual PAC-3 interceptor production, from roughly 600 units a year to 2,000[8]. This is a necessary step, but it does little to replenish stockpiles for Gulf states that urgently need them.

Iran's own resilience makes the asymmetry worse. US and Israeli strikes blocked dozens of tunnel entrances at Iran's underground missile sites. However, Iranian forces resumed launches within weeks. Following the ceasefire, satellite imagery analysed by CNN showed that Iran had reopened roughly fifty of sixty-nine blocked tunnel entrances across eighteen struck missile sites[9]. The pattern held even while the war was underway: accounts relayed to the Irish Times described missiles being launched from Kermanshah-area sites within hours of a bombing run against that same location, and a Yazd-area complex that Western officials believed extended hundreds of metres into granite stayed intermittently operational through forty days of strikes, with residents reporting launches continuing almost to the ceasefire itself[10]. It is this durability, not merely the number of warheads Iran has left, that Gulf planners now have to defend against. Nor can Gulf states easily build their way out of the dependence that makes defence so costly within their own timelines. Saudi Arabia's SAMI and the UAE's EDGE are both moving into the missile-defence and counter-drone space the war exposed as most urgent, and with real results: EDGE's domestically developed jammers accounted for roughly 85 percent of the drones its systems engaged over the UAE during the war, by the company's own account, and its chairman has said the UAE expects to add local missile air-defence capability within the next year or two, with the goal of a fully domestic air-defence capability over the following several years[11]. SAMI, for its part, has already localised production of interceptor canisters and missile-round pallets for the THAAD system under a long-standing agreement with Lockheed Martin[12]. Both programmes are genuine and worth building on, but both remain narrow slices of much larger American- and European-built systems: the seekers, propulsion systems and fire-control software at the core of the interceptor supply chain stay in foreign hands, which is precisely the dependency this war exposed as unreliable under sustained pressure. The strategic question, in short, is not whether Gulf states can intercept Iranian weapons, since they have been quite successful at that, but whether they can sustain that defence through a prolonged campaign against an adversary able to replenish its own arsenal more cheaply than defenders can replace what it costs them to stop it.

[7] Joseph Trevithick and Tyler Rogoway, “Iranian Attacks on Critical Missile Defense Radars Are a Wake-Up Call,” The War Zone, March 7, 2026, https://www.twz.com/news-features/iranian-attacks-on-critical-missile-defense-radars-are-a-wake-up-call.

[8] “U.S. Will Triple Production of PAC-3 MSE Air Defense Interceptors by 2033,” Army Recognition, January 2026, https://theprint.in/world/lockheed-martin-to-more-than-triple-patriot-missile-production-capacity/2820496.

[9] “CNN: Most of Iran’s Underground Missile Bases Restored,” Asia Economy Daily, May 31, 2026, https://view.asiae.co.kr/en/article/2026053121530671102.

[10] Mark Tran et al., “Inside Iran’s Underground ‘Missile Cities’: Battered but Still Firing,” The Irish Times, June 12, 2026, https://www.irishtimes.com/world/middle-east/2026/06/12/inside-irans-underground-missile-cities-battered-but-still-firing/.

[11] “UAE-Made Jammers Tackled 85% of Drones Launched from Iran, Says EDGE Chairman,” Gulf News, May 4, 2026, https://gulfnews.com/uae/uae-made-jammers-tackled-85-of-drones-launched-from-iran-says-edge-chairman-1.500528335.

[12] “Lockheed Martin Awards Localization Subcontracts for THAAD Weapon System in the Kingdom of Saudi Arabia,” Lockheed Martin, February 5, 2024, https://www.lockheedmartin.com/en-sa/news/lockheed-martin-awards-localization-subcontracts-for-thaad-weapon-system-in-the-kingdom-of-saudi-arabia.html.

Gulf cooperation did function as designed, within the narrow terms it was designed for. The Unified Military Command coordinated information-sharing and cross-cueing of national air-defence assets throughout the war, and by mid-March member states had jointly reported intercepting more than 954 Iranian missiles, 2,500 drones and 17 aircraft, a combined tally they used to seek a UN Security Council condemnation of Iran[13]. That is a genuine institutional achievement: six air forces and national command centres shared targeting-relevant data in real time, under fire, at a scale the GCC had never attempted before. It is also the limit of what the GCC's existing architecture provides. Deterrence rests on two components: the capacity to defend and the capacity to make an attack costly enough to discourage it. The GCC's Unified Military Command supplied only the first. What has stood in for the second has never really been a Gulf capability at all; it has been an American one, built on decades of Gulf states assuming that the United States would eventually impose the costs they could not impose themselves, whether through direct retaliation or simply through the deterrent weight of its regional presence. This war tested that assumption directly, and it did not hold consistently: Iran absorbed strikes on its own soil and went on striking Gulf states regardless, which is exactly the evidence that impressive interception statistics are not a substitute for a credible retaliatory threat. Nothing built during this war gave the GCC that threat on its own terms, and the reason is not a shortage of institutions but a shortage of trust between the states that would have to act together.

Unity Under Fire: The GCC's Collective-Action Problem

That shortage of trust starts at the top. Saudi Arabia and the UAE, the GCC's two most capable members, have spent the past decade drifting into rivalry rather than partnership, with direct security consequences for the region. Both joined the Saudi-led coalition against the Houthis in 2015; both have since backed opposing Yemeni factions, Saudi Arabia supporting the internationally recognised government and the UAE cultivating the separatist Southern Transitional Council (STC)[14]. That divergence came to a head on 30 December 2025, when Saudi-led forces struck a weapons shipment at Mukalla port that Saudi officials said was intended for the STC; the UAE disputed the account and announced its withdrawal from Yemen the same day[15]. Saudi-backed forces went on to retake STC-held territory the following month[16]. Two states that entered Yemen as coalition partners a decade earlier left it, in effect, backing rival claimants and actively undermining one another's efforts. This rivalry, which Iran has every reason to welcome, is likely to be a source of growing mistrust and divergence between two prominent regional powers.

Yemen is not the only fault line. Saudi Arabia restored diplomatic relations with Iran in a China-brokered deal as early as 2023, and most of its neighbours have since favoured de-escalation with Iran[17]; the UAE, by contrast, has taken a markedly more forceful public posture. Senior Emirati officials have called Iran's wartime attacks "premeditated" rather than reactive, lamented that years of UAE engagement with Iran had failed to change its behaviour, and pressed fellow GCC states to integrate

[13] "Gulf Nations Call for UNSC Condemnation of Iran; Say They Intercepted 954 Missiles, 2,500 Drones, 17 Planes," IANS/OMMCOM News, March 12, 2026, https://ommcomnews.com/world-news/gulf-nations-call-for-unsc-condemnation-of-iran-say-they-intercepted-954-missiles-2500-drones-17-planes/.

[14] "Factbox: Saudi Arabia's Coalition against Yemen's Houthis," Reuters, 2015, https://news.yahoo.com/factbox-saudi-arabias-coalition-against-yemens-houthis-112359529.html.

[15] "UAE Says It Is Withdrawing Its Remaining Forces in Yemen 'Voluntarily' after Tensions Flare with Saudi Arabia," Dawn, December 30, 2025, https://www.dawn.com/news/1964103.

[16] "Saudi-Backed Government Forces Retake Multiple Cities in Southern Yemen," Al Jazeera, January 4, 2026, https://www.aljazeera.com/news/2026/1/4/saudi-backed-government-forces-retake-multiple-cities-in-southern-yemen.

[17] "Saudi Arabia, Iran Committed to Beijing-Brokered Deal — Statement," Arab News, 2023, https://arabnews.pk/node/2426386/middle-east.

their defences and prepare a joint response should Iran escalate again. The UAE has also withdrawn from OPEC amid production-limit disputes sharpened by the crisis and warned it could leave the Arab League if the bloc's response to Iran proves inadequate[18]. Oman and Qatar have continued, throughout, to prioritise mediation. Six states interpreting the same threat so differently cannot easily agree on when, or how forcefully, to respond to it, and an adversary needs only to notice the same divergence to calculate that striking its most exposed member will not automatically draw in the rest.

Without a reliable collective alternative, individual GCC states have instead diversified their own security partnerships, unevenly, and according to their own capacity. Saudi Arabia, the wealthiest and most militarily capable member, with defence spending that reached an estimated $72.5 billion in 2025, has moved furthest and fastest, layering a formal defence pact with Türkiye and Pakistan and new defence-industrial ties with Ukraine on top of its existing relationship with the United States[19]. That pace of diversification, though, raises a question: does one state's bilateral hedging make the region more secure, or does it simply redistribute exposure toward whichever member has diversified least? Bahrain illustrates the risk starkly. As host to Naval Support Activity Bahrain and the US Fifth Fleet, it absorbed the brunt of the war's damage to a regional security asset every GCC member relies on, but its small size and budget leave it with far less capacity than Saudi Arabia or the UAE to build a comparable hedge or replacement of its own[20]. Gulf energy and transport infrastructure is just as interconnected: an attack on an export terminal or shipping lane in a less-protected member state can disrupt the economy of the entire region, however well-defended its neighbours are. Collectively, the GCC commands resources sufficient to deter nearly any plausible attacker; divided over Iran, Yemen and regional leadership, that same deterrent becomes trivially easy to defeat member by member. And because the collective action that could close that gap has so far rested less on the GCC's own institutions than on American power, it is the reliability of the United States, not Gulf unity alone, that the war put to its sharpest test.

Beyond Washington: Strategic Hedging And The Search For Security Alternatives

Gulf states have hedged their external dependence before. Long before this war, Saudi Arabia, the UAE, Qatar and their neighbours cultivated relationships with China, Russia and India alongside the United States, less from any ambition to replace the American security guarantee than to avoid depending on it so completely that a single shift in US policy could leave them exposed. The 2026 war turned that long-standing habit from prudence into necessity.

From a GCC perspective, US reliability did not hold up well. Gulf governments were not given advance notice of the 28 February strikes, and officials in at least two Gulf states later told the Associated Press that US officials had ignored their warnings about the war's likely regional fallout[21]. Six months later, the United States again demonstrated the limits of its commitment when it declined a direct Saudi

[18] "Hardest-Hit by Iran, the UAE Pivots from Cooperation to Confrontation," The Christian Science Monitor, April 29, 2026, https://www.csmonitor.com/World/Middle-East/2026/0429/iran-war-uae-hawkish-emiratis-arms-purchases.

[19] "World's 15 Largest Defense Budgets in 2025," Defaiya, May 24, 2026, https://www.defaiya.com/news/Defense%20News/North%20America/2026/05/24/world-s-15-largest-defense-budgets-in-2025.

[20] "Damage to US Navy Base in Bahrain from Iranian Strikes Estimated at $400 Million, Pentagon Reviews Regional Force Posture," The Defense News, June 26, 2026, https://www.thedefensenews.com/Damage-to-US-Navy-Base-in-Bahrain-From-Iranian-Strikes-Estimated-at-400-Million-Pentagon-Reviews-Regional-Force-Posture/.

[21] Matthew Lee et al., "Gulf Allies Complain US Didn't Notify Them of Iran Attacks and Ignored Their Warnings, Sources Say," Associated Press, March 6, 2026, https://wtop.com/world/2026/03/some-gulf-countries-frustrated-with-lack-of-notice-about-iran-strikes-defense-help-ap-sources-say/.

request for US military action against Houthi forces, offering intelligence support instead[22]. A guarantor that withholds advance notice of strikes and declines requests for direct military support falls short of the security role Gulf states have relied on for decades. Whether this reflects a lasting shift in US regional commitments or the preferences of the current administration is a question Gulf governments cannot afford to leave unanswered. Hedging is precisely about avoiding such uncertainty and the risk of being forced to make strategic decisions at the last moment.

Gulf states are already acting on it individually. Saudi Arabia's clearest answer has been the Makkah Joint Defence Agreement, signed with Türkiye and Pakistan on 7 August 2026, which commits the three states to treat an attack on one as an attack on all[23]. The pact has already moved beyond declarations: when Iran-linked escalation again threatened Saudi territory in early October 2026, the three governments convened an emergency meeting of the agreement's Strategic Political and Defence Committee in Riyadh and agreed to activate its collective-deterrence provisions, with Türkiye and Pakistan committing to the rapid deployment of agreed forces and capabilities to Saudi Arabia[24]. That is a materially different posture from the GCC's own wartime coordination, which never moved past information-sharing to a binding mutual-defence commitment of that kind.

Saudi Arabia, Qatar and the UAE have also deepened defence ties with Ukraine.[25] That partnership deserves to be taken seriously on its own terms, because Ukraine's wartime industrial record speaks directly to the cost-exchange problem driving Gulf air-defence spending. According to President Volodymyr Zelensky, domestically produced weapons rose from roughly 30 percent of what Ukrainian forces fielded at the end of 2024 to nearly 60 percent by September 2025[26]. The category that bears most directly on the GCC's own predicament is narrower than that aggregate figure suggests. Ukraine's dependence on imported interceptors to counter mass drone and missile attack, structurally the same problem Gulf states now face, is what domestic production has displaced fastest: by early 2026, Ukrainian forces were receiving more than 1,500 domestically produced anti-Shahed interceptor drones a day, a cheaper, faster-to-field defensive layer that supplements rather than replaces missile interceptors against the same kind of mass drone attack the GCC experienced[27]. Artillery tells a complementary story: monthly output of the domestically designed Bohdana self-propelled howitzer roughly quadrupled, from about 10 units in May 2024 to 40 by October 2025[28]. What drove the shift was Ukrainian ingenuity as much as Ukrainian urgency: dependence on imported interceptors meant dependence on the political calendars, export licensing and shipping timelines of other governments, exactly the friction a state under sustained missile attack cannot afford; Ukraine's answer was a deliberate, state-directed

[22] "Saudi Crown Prince Sought US Military Help from Trump with Houthis, Sources Say," Al-Monitor, September 2026, https://al-monitor.com/originals/2026/09/saudi-crown-prince-sought-us-military-help-trump-houthis-sources-say.

[23] "Turkey, Saudi Arabia and Pakistan to Establish Political and Military Mechanisms under Defence Pact," The National, August 13, 2026, https://www.thenationalnews.com/news/gulf/2026/08/13/turkey-saudi-arabia-and-pakistan-to-establish-political-and-military-mechanisms-under-defence-pact/.

[24] "Turkiye, Pakistan Agree Saudi Arabia Military Deployment under Mecca Pact," Al Jazeera, October 5, 2026, https://www.aljazeera.com/news/2026/10/5/mecca-alliance-agrees-to-activate-collective-deterrence-measures.

[25] "Ukraine, Saudi Arabia Sign Deal on Defence Cooperation, Zelenskiy Says," Al Arabiya English, March 27, 2026, https://english.alarabiya.net/News/saudi-arabia/2026/03/27/ukraine-saudi-arabia-sign-deal-on-defense-cooperation-zelenskyy-says-.

[26] "Nearly 60% of Ukrainian Forces' Weapons Domestically Produced, Zelensky Says," Kyiv Independent, September 7, 2025, https://kyivindependent.com/nearly-60-of-ukrainian-forces-weapons-domestically-produced-zelensky-says/.

[27] "Ukraine Produces over 1,500 Anti-Shahed Drones Daily — Shmyhal," UNN, January 7, 2026, https://unn.ua/en/news/ukraine-produces-over-1500-anti-shahed-drones-daily-shmyhal.

[28] "Bohdana Artillery Output Hits 40 Units Monthly as Ukraine Scales Up Defense Production," Euromaidan Press, October 7, 2025, https://euromaidanpress.com/2025/10/07/bohdana-artillery-output-hits-40-units-monthly-as-ukraine-scales-up-defense-production.

push to substitute imports with domestic manufacturing, sustained at wartime pace for two years rather than announced once and left to develop on its own. Gulf states are operating under no comparable deadline, and the absence of existential pressure is itself an advantage rather than an excuse: it leaves them with economic and diplomatic room that Ukraine never had, enabling them to build the same capability cooperatively rather than scrambling to build it alone, provided they can agree to use that room together instead of separately.

Gulf states have the capital to attempt something comparable several times over. Saudi Arabia's Public Investment Fund alone held an estimated $1.15 trillion in assets as of mid-2025, and the UAE's Abu Dhabi Investment Authority and Kuwait's Kuwait Investment Authority each exceeded $1 trillion in the same period: three sovereign funds whose combined capital dwarfs anything Ukraine could draw on, wartime financing included[29]. What Gulf states have not shown is the pace or the coordination to match it. Saudi Arabia's SAMI and the UAE's EDGE have both grown quickly, with EDGE alone reporting $4.9 billion in revenue in 2024, more than a fifth of that from exports[30]. However, Saudi localisation of military spending reached only an estimated 19.35 percent in 2024, up from 4 percent in 2018 and still far short of the Vision 2030 target of 50 percent by the end of the decade[31]. Progress elsewhere in the GCC is similarly uneven. The deeper problem is structural, not financial. SAMI and EDGE are national projects, built by rival governments as instruments of national industrial policy rather than as the foundation of a shared regional supply chain, and a joint Gulf defence-industrial base would require exactly the trust that Saudi Arabia and the UAE have spent the past decade eroding. That gap leaves the region's weaker members exactly where they were: exploitable by an adversary that can pick off whichever GCC state has the weakest security partnerships and domestic defence industry.

There is a further, forward-looking version of this exposure. The Strait of Hormuz and Bab el-Mandeb are not only vital to the GCC. They are also chokepoints the whole world economy depends on, carrying a large share of global energy and fertiliser exports. That importance is precisely what makes Gulf infrastructure attractive leverage in conflicts that have nothing to do with the GCC itself. A future confrontation between the United States and a China-aligned power need not touch the Gulf directly for an adversary to calculate that pressure on Hormuz, or on Gulf shipping and energy exports, is a cheap way to raise costs for the United States. Iran had a direct grievance for targeting GCC states in 2026; a future adversary competing with the United States may need none at all beyond the fact that Gulf territory sits astride chokepoints the United States has an interest in keeping open. The GCC is not currently built to withstand a crisis in which it is collateral rather than combatant, and preparing against that kind of exposure is a gap worth closing before it is tested.

From Fragmentation To Resilience: Building A Collective Gulf Security Architecture

Turning these diagnoses into policy means accepting that no single fix solves the GCC's problem, and that the fixes available are not equally within reach.

The most urgent is also the most expensive: sustaining air defence through a long campaign rather than just its

[29] "Sovereign Giants PIF, ADIA, KIA Thrive in Trillion-Dollar Club with Surging AUMs," Zawya, citing Global SWF rankings, July 2025, https://www.zawya.com/en/special-coverage/focus-global-wealth-funds/sovereign-giants-pif-adia-kia-thrive-in-trillion-dollar-club-with-surging-aums-xg3avks3.

[30] "UAE's EDGE Group Projects $5 Billion Revenue for 2025 Amidst Global Expansion," The Arabian Post, https://thearabianpost.com/uaes-edge-group-projects-5-billion-revenue-for-2025-amidst-global-expansion/.

[31] "Saudi Arabia's Drive to Build a Defense Powerhouse," Arab News, https://www.arabnews.com/node/2611276.

opening weeks. GCC states should pursue joint procurement and shared interceptor reserves, invest in domestic or licensed production of cheaper counter-drone and counter-missile systems, and harden or disperse the radar and command infrastructure that proved so vulnerable this year. Ukraine offers the clearest model for what a serious domestic push could look like: a state-directed effort, sustained at wartime pace and backed by capital Gulf governments already command several times over, that pushed domestically produced weapons from under a third of what Ukrainian forces fielded to nearly two-thirds within two years and built a dedicated interceptor-drone industry supplying well over a thousand units a day. This is precisely the defensive capability category the GCC itself needs most. Saudi Arabia's SAMI and the UAE's EDGE have both grown quickly, but neither has moved with urgency because both remain constrained by their design and wider political considerations: they are national champions competing for contracts and prestige, not the foundation of a shared regional supply chain. The fastest way out of the cost-exchange trap is to pool procurement and production across all six states. However, that approach runs straight into the GCC's hardest problem: rivalry between Saudi Arabia and the UAE.

That rivalry deserves treatment on its own terms, because it undercuts nearly every other fix available to the GCC. Saudi Arabia and the UAE are each other's most capable potential partners and each other's most persistent rivals, and there is no obvious way to reconcile the two from outside. Both are building substantial defence industries, and both are set on regional leadership on their own terms. What might change the calculus is self-interest rather than diplomacy: a sustained Iranian threat could eventually make the cost of competing in Yemen and elsewhere higher than the cost of cooperating. Until Saudi Arabia and the UAE reach that conclusion themselves, the resources and diplomatic energy that could underpin a genuine regional security architecture will keep being spent on checking each other instead.

Collective deterrence suffers from the same root cause, which is why it needs a similar kind of fix. The GCC's wartime coordination worked because it asked little of its members: share information, issue joint statements, let national air-defence systems handle the rest. Turning that into something an adversary actually fears means moving toward an agreed floor for how members respond when one of them is attacked: shared early warning, interoperable systems and, eventually, minimum thresholds for retaliation. Persuading six states with different threat perceptions to commit to that will be just as hard as building a shared defence-industrial base, and for the same reason. It is necessary anyway, because a GCC that cannot agree on when to respond together is, in practice, a GCC an adversary can pick off member by member.

US policy remains one variable that Gulf states cannot change on their own. The rejection of Saudi Arabia's request for action against the Houthis and the lack of advance notice before the February strikes look less like a permanent downgrading of the alliance than a function of how this particular administration weighs its own interests against those of its partners, a distinction that offers little reassurance to a government that has to plan its defence around US decisions regardless of why they are made. What GCC states can do is treat hedging as policy rather than improvisation: negotiate explicit understandings, in advance, about what support is available in a crisis; insist on consultation before operations of this scale are launched from or affect their own territory; and continue building alternative partnerships with Türkiye, Pakistan and Ukraine, and selectively with China, so that hesitation by any single guarantor is less likely to leave them exposed. The more durable answer still is to raise their own retaliatory and deterrent capability, since

that is the one response that improves GCC security regardless of what the United States ultimately decides.

None of this is quick, and none of it works alone. Diversifying abroad without resolving the GCC's own divisions just spreads the same vulnerabilities across more partners. Resolving those divisions without continued US engagement leaves capability gaps that unity alone cannot close. The institutional foundation for doing both already exists, in the Unified Military Command and the 2000 Joint Defence Agreement, and in a demonstrated capacity to coordinate even while under fire[32]. What the 2026 war leaves open is whether Gulf governments treat that foundation as something to build on, or let rivalry and dependence on the United States go on deciding how exposed they remain the next time a war not of their own choosing reaches their shores.

[32] "Gulf Cooperation Council Defense Agreement," CRS Report RS20831, Congressional Research Service, https://www.everycrsreport.com/reports/RS20831.html.



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