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Beyond Washington: Gulf Partnerships Under Review

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Editor



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Editor's Note

The United States (US)-Israel military campaign against Iran, launched on 28 February 2026 under the codename Operation Epic Fury, did not merely redraw the Middle East's security map. It also stress-tested every significant external partnership the Gulf Arab states had cultivated over the preceding decade.

Iran's closure of the Strait of Hormuz, through which roughly a quarter of the world's seaborne oil and a fifth of global LNG had until that point moved freely, severed the arteries of Gulf commerce and overwhelmed every government at the helm of countries with economic stakes in the region. The spike in waterway volatility, encapsulated by the US naval blockade of Iranian ports accompanying Iran's strait closure—and now, the Houthi threat on the Red Sea—produced immense global energy security challenges, with cascading effects on oil markets, LNG supply chains, fertiliser trade, and the economic transformation agendas that Gulf states had staked their post-hydrocarbon futures on.

What the crisis revealed, with uncomfortable clarity, is that the Gulf's carefully cultivated web of partnerships—with Beijing, New Delhi, Ankara, Seoul, Tokyo, Moscow, and various European capitals—had been calibrated for an era of managed competition, not open war.

This report examines eight of those partnerships through the prism of the 2026 conflict and its aftermath. Each chapter assesses a relationship that was elevated, strained, or fundamentally reoriented by the events in the Persian Gulf between February and June 2026. The selection is deliberately varied in register, and several cross-cutting trends emerge from the essays as a whole.

The first is the gap between declared partnership and demonstrated commitment: across multiple relationships, the war exposed a distance between the deep rhetoric of bilateral ties, and the willingness—or capacity—of partners to act when Gulf states were under direct attack. The second is the growing premium on hardware: air defence systems, interceptor stocks, and defence-industrial cooperation moved to the centre of Gulf partnership calculations in ways that will reshape procurement and alliance logic for years. The third is the limits of strategic ambiguity: partners that had cultivated productive neutrality between Washington and Tehran found that open war foreclosed the middle ground, forcing choices—or exposing the consequences of refusing to make them. Lastly, running beneath all the others, is the accelerating diversification of Gulf security relationships away from a single anchor: the United States remains indispensable, but as these essays show, the Gulf is actively diversifying the load it has long placed on a single security anchor.

The report is structured in two halfs. The first part examines Asian partnerships with the Gulf—relationships defined, in the main, by deep energy dependencies, expanding economic and defence-industrial ties, and the particular challenge of managing Washington's expectations while pursuing independent Gulf strategies. The second turns to European partners, each of which entered the war with a distinctive bilateral profile and emerged from it having learned something specific about the limits and possibilities of their Gulf engagement.

Ji-Hyang Jang opens the volume by making the case that South Korea must move beyond its role as arms supplier to become a genuine security partner in the Gulf.

Shigeto Kondo, in the second essay, examines Japan's navigation of three simultaneous imperatives during the war: preserving the US alliance, protecting energy security, and retaining diplomatic room for manoeuvre with both Iran and the Gulf states.

Md. Muddassir Quamar follows with an assessment of the contradictions at the heart of India's strategic autonomy doctrine as they surfaced during the conflict, and asks whether India's friend-to-all posture can survive the stress-test of open war.

Ahmed Aboudouh closes the first half of the volume with an interrogation of China's studied wartime neutrality and what it has revealed about the nature of Beijing's comprehensive strategic partnerships with GCC states.

Souhire Medini opens the European section by examining how France's network of bilateral defence agreements with the UAE, Qatar, and Kuwait—formalised over decades—was activated under live Iranian missile attack for the first time.

Leo Goretti, in the sixth chapter, traces Italy's unexpected emergence as a Gulf security actor when GCC states urgently requested its SAMP/T batteries—the only European-made system capable of intercepting ballistic missiles—following the Iranian barrage of 28 February.

Neil Quilliam then assesses Britain's decision to offer its bases for defensive strikes on Iran as the volume's clearest example of a European partner making a concrete operational commitment rather than a declaratory one.

The volume closes with *Nikolay Kozhanov's* analytically distinctive essay on Russia–GCC relations. Russia emerged from the war as a quiet economic beneficiary with an uptick in oil revenues, while simultaneously providing reported intelligence support for Iran, and declining to use its leverage over Tehran to protect its most important Gulf economic partner—the UAE.

Taken together, these essays do not argue for a single thesis of Gulf realignment. They make the case, rather, that the war made the cost of ambiguity visible. Crucially, the partnerships emerging from the regional crisis will be shaped less by historical affinity than by demonstrated utility at a moment of genuine jeopardy.

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1

From Supplier to Partner: South Korea's Gulf Security Moment

Ji-Hyang Jang

South Korea's relationship with the Gulf region has deepened over the past two decades, moving well beyond its origins in oil imports and construction contracts into nuclear energy, advanced manufacturing, defence, and technology. The Barakah nuclear power plant—the Arab world's first, built by a South Korean consortium—stands as the most visible symbol of that transformation. The 2023 Korea-Gulf Cooperation Council (GCC) Free Trade Agreement, the 2026 Korea-UAE Comprehensive Economic Participation Agreement (CEPA), and growing defence-industrial cooperation with the UAE and Saudi Arabia have further consolidated ties that now span the full range of both sides' economic and strategic interests.

The 2026 Iran war, however, tested those ties in ways Seoul had not anticipated. The UAE deployed South Korea's Cheongung-II air defence system before the outbreak of hostilities. In its first overseas combat use, the system achieved considerable success against Iranian projectiles and quickly generated new Gulf demand.[1] Seoul's own response to the crisis, in contrast, was cautious and inward-looking, dominated by domestic concern over Washington's redeployment of Terminal High-Altitude Area Defence (THAAD) batteries from South Korea to the Gulf. As a result, the country that had supplied some of the Gulf's most effective air defence hardware struggled to frame Gulf security as a South Korean strategic interest in its own right.

This article argues that South Korea must now make that reframing explicit. Freedom of navigation in the Strait of Hormuz is a direct national interest for Seoul, not a peripheral concern, as South Korea depends on the Gulf for the bulk of its energy imports. Its own vessel, the *Namu*, came under Iranian attack in May 2026.[2]

The article surveys South Korea-Gulf relations before the war, assesses what the conflict has revealed about the partnership's limits and opportunities, and sets out the steps Seoul should take to move from arms supplier to security partner in the Gulf.

A Partnership Beyond Energy: South Korea and the Gulf Before the War

Gulf-South Korea cooperation has expanded into healthcare, agriculture, food security, artificial intelligence (AI) and semiconductors, and defence. Defence cooperation has expanded rapidly with the UAE and Saudi Arabia, evolving from arms sales towards broader defence-industrial cooperation as Gulf states seek to strengthen their domestic defence capabilities.[3] The Korea-GCC FTA, concluded in December 2023 but not yet in force at the time of writing, is expected to further deepen these ties.

The UAE is Seoul's only 'Special Strategic Partner' in the region. Since 2011, it has hosted the Republic of Korea (ROK) Army's Akh Unit, which trains and conducts joint exercises with UAE special forces. The Korea-UAE CEPA, which entered into force in May 2026, has already improved bilateral market access. Elsewhere in the Gulf, South Korea is seeking to participate in Saudi Arabia's nuclear energy programme, while Qatar remains an important long-term supplier of liquefied natural gas (LNG). Against this backdrop of deepening but still largely transactional ties, the 2026 Iran war proved both a stress test and an unexpected opportunity.

Tested by Fire: The Iran War and the Gulf's Air Defence Reckoning

The 2026 Iran War tested the Gulf's air-defence architecture and highlighted both its effectiveness and limitations. The integrated systems operated by the United States (US) and its Gulf partners, incorporating layered defences, real-time intelligence sharing, interoperability, reportedly intercepted many missiles and drones.[4] The UAE reported interception rates of approximately 94 percent against drones and 92 percent against missiles during the war.[5] It, however, exposed a challenge: the high cost of using advanced interceptors against many relatively inexpensive drones and missiles.[6] With the US and Europe already under pressure from the wars in Ukraine and the Middle East to supply advanced interceptors,[7] the Gulf region faces growing pressure to increase stocks, develop low-cost counter-drone capabilities, and strengthen regional defence-industrial capacity. South Korea can contribute to addressing this gap. Its Cheongung-II medium-range surface-to-air missile defence system has demonstrated combat effectiveness and cost advantages over comparable Western systems. The UAE and Saudi Arabia have sought accelerated deliveries as their interceptor stocks come under pressure. Expanding production capacity, however, will be necessary to meet growing regional demand.

Nevertheless, South Korean defence systems were already demonstrating the capabilities the Gulf required. Two batteries of South Korea's Cheongung-II missile defence system delivered to the UAE before the war reportedly achieved a 96 percent interception rate against Iranian missiles, although the UAE Ministry of Defence has not confirmed this figure.[8] The reported performance nonetheless strengthened the system's credibility and demonstrated the growing role South Korea can play in Gulf security.[9]

The UAE, which had contracted for 10 batteries in 2022, deployed two by early 2026, alongside Patriot PAC-3 and THAAD systems within its multilayered air-defence architecture.[10] The war,

however, pulled Seoul in two directions: outward, towards Gulf partners urgently demanding the capabilities South Korea had just proven, and inward, towards a domestic security debate that left little political space for anything beyond self-protection.

Present but Absent: Seoul's Limited Wartime Response

South Korea's response to the crisis has remained cautious and limited. Domestic debate are focused primarily on US strategic flexibility and the implications of redeploying American missile defence assets from South Korea to the Gulf.[11]

For South Koreans living under the enduring threat from North Korea, the redeployment of parts of the US air-defence assets raised concerns about whether missile-defence assets on the peninsula could be reassigned to meet Washington's broader global operational requirements.[12] When the redeployment became public in March, South Korean President Lee Jae-myung sought to ease domestic concerns at a Cabinet meeting, saying that there was "no cause for concern" about national defence.[13]

The episode marked the first practical application of the long-debated concept of strategic flexibility to missile-defense assets based in South Korea. Previously discussed largely in the context of a Taiwan contingency, its unexpected test in the Gulf brought South Korea's own security concerns to the forefront, leaving limited policy attention for broader security cooperation with Gulf partners.

In contrast, other partners responded more directly to the crisis. Australia, France, the UK, and Italy deployed aircraft, air-defence capabilities, and personnel to support Gulf states and regional maritime security. The UK and France also co-led the multinational military mission to restore freedom of navigation in the Strait of Hormuz.[14]

South Korea's security concerns were understandable, but they do not fully explain the limited scope of its response to the Gulf crisis. Despite extensive energy, nuclear, and defence ties that give Seoul a direct stake in the security of its Gulf partners, policy attention remained focused largely on protecting South Korea from the conflict's domestic economic fallout. Energy security was the immediate priority. As the Strait of Hormuz neared closure, the government activated emergency monitoring mechanisms, released emergency oil stocks as part of an International Energy Agency (IEA) collective action, explored alternative sources of supply, and coordinated with refiners, energy companies, and public agencies to minimise disruptions.[15]

From Supplier to Partner: Recommendations for Seoul

The war has created a narrow but consequential window. As Gulf states seek to replenish depleted interceptor stocks, diversify suppliers, and strengthen integrated air and missile defences, South Korea's proven systems, expandable production capacity, and existing partnerships with the UAE and Saudi Arabia give it an established entry point.

Rather than replacing high-end US systems such as Patriot and THAAD, Cheongung-II can complement them within the Gulf's multilayered air and missile defence network. Seoul should deepen cooperation in air and missile defence and counter-drone capabilities, combining arms exports with joint production, training, maintenance, technology cooperation, and sustained operational engagement.

South Korea should assume a more active role in regional maritime security. Such engagement would be consistent with Seoul's Indo-Pacific Strategy, which emphasises a rules-based international order, comprehensive security cooperation, resilient supply chains, and energy security, while calling for stronger maritime domain awareness and navigational safety. The principle at stake in the Strait of Hormuz extends beyond the Gulf: acquiescing to coercive restrictions on freedom of navigation in one of the world's most important waterways would weaken the same rules-based maritime order that South Korea seeks to uphold closer to home, including in the South China Sea.[16]

As the US, the UK, and France strengthen mechanisms to protect commercial shipping, counter maritime threats, and restore safe passage through the Strait of Hormuz, South Korea should establish practical avenues for participation. Expanding *the Cheonghae Unit*'s role in and around the Strait, participating in multinational mine-countermeasure exercises and combined naval training, and strengthening maritime information sharing and coordination with the US Fifth Fleet in Bahrain would be practical first steps.

Ultimately, South Korea must move beyond a transactional defence relationship towards a comprehensive security partnership with the Gulf. The attack on the South Korean vessel *Namu* on Hormuz demonstrated that threats to Gulf security can directly affect South Korea's own security and economic interests. As a responsible middle power, Seoul shares strategic interests with its Gulf partners and with G7 and NATO democracies, particularly as cooperation among China, Russia, Iran, and North Korea (CRINK) deepens. Sustained contributions to Gulf security, building on South Korea's defence-industrial strengths, would therefore help protect its own national interests while supporting the rules-based international order.

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2

Alliance, Energy, and Partnerships: Japan's Three-Way Balancing Act in the Gulf

Shigeto Kondo

The 2026 Iran War has demonstrated that Japan's relations with the Gulf Cooperation Council (GCC) states have evolved beyond a conventional oil buyer-seller relationship into partnerships grounded in economic security. Japan remains overwhelmingly dependent on the Middle East for crude oil, which supplied 94.7 percent of its imports in fiscal year 2023.[1] Saudi Arabia and the United Arab Emirates (UAE) are therefore central to Japan's energy security. At the same time, GCC governments pursuing economic diversification value Japanese technology, investment, industrial expertise, and human resource development. The war has exposed this mutual dependence while demonstrating that cooperation now extends beyond energy, to trade, advanced technology, and industrial development.

Until Prime Minister Sanae Takaichi met with United States (US) President Donald Trump on 19 March, coordination with Washington remained the Japanese government's immediate diplomatic priority. It did not prioritise GCC diplomacy at the outset. Tokyo needed to assess the scope of US military action, the risk of further escalation, and the role expected of Japan. Takaichi had identified Iran, freedom of navigation through the Strait of Hormuz, and energy security as central issues for the summit. The two leaders subsequently agreed to maintain close communication on de-escalation, maritime security, and stable energy supplies.[2] Direct engagement between Takaichi and GCC leaders was consequently limited during the war's opening phase.

Japan was simultaneously devoting substantial resources to protecting and evacuating its nationals. On 5 March, the Ministry of Foreign Affairs raised travel-warning levels for all six GCC states and announced evacuation arrangements from Kuwait, Bahrain, Qatar, and the UAE via Riyadh or Muscat, followed by charter flights to Tokyo.[3] Emergency response teams were also dispatched.[4] This crisis-management burden helps explain why Japan's initial Gulf diplomacy focused on safeguarding its nationals and preserving existing supply relationships rather than announcing new initiatives.

Securing Oil Supplies

Japan's principal diplomatic task soon became the securing of physical crude supplies. The disruption of shipping through the Strait of Hormuz created not only a price shock but also the prospect that tankers would be unable to load and deliver oil. By 13 March, the Ministry of Economy, Trade and Industry had warned that a prolonged disruption could sharply reduce imports from late March onward.[5] Japan thus concentrated its diplomatic efforts on Saudi Arabia and the UAE.

Saudi Arabia remained indispensable because of its scale, spare production capacity, and export flexibility. Its East-West Pipeline links eastern production facilities with Yanbu on the Red Sea, enabling exports to bypass the Strait of Hormuz. During the war, Saudi Aramco reportedly operated the pipeline at its maximum capacity of seven million barrels per day (mbpd), making it a crucial alternative export route.[6] In May, Japan's Minister of Economy, Trade and Industry, Ryosei Akazawa, and Saudi Energy Minister Prince Abdulaziz bin Salman agreed to establish a joint task force to examine all possible options for strengthening energy security.[7] This included expanding Saudi Arabia's East-West Pipeline. On 26 August, the Japanese government announced that JOGMEC, an agency under the Ministry of Economy, Trade and Industry, would provide financial support for expanding such a pipeline as an alternative to the Strait of Hormuz.[8] Japan's longstanding governmental and corporate ties with Riyadh and Aramco enabled rapid consultations on the continuity of supply.

The UAE constituted the second pillar. When Takaichi met Sultan Al Jaber, Minister of Industry and Advanced Technology and Special Envoy to Japan, on 5 March, she requested cooperation regarding both the safety of Japanese nationals and stable crude supplies, and the UAE expressed its willingness to assist.[9] The two countries later discussed additional UAE crude supplies and expanding the joint stockpiling arrangement in Japan during Akazawa's May visit to the UAE.[10] Under this system, Japan provides domestic storage facilities to producer-country national oil companies while retaining priority access to the stored oil in an emergency.[11]

Thus, oil security was maintained through a combination of Saudi and Emirati crude supplies, alternative export routes, joint stockpiles, and national reserves. The most important achievement of Japan's GCC diplomacy since the eruption of the war was not a declaration but the practical preservation of crude-oil availability.

CEPA and Cooperation in LNG

Negotiations on the Japan-UAE Comprehensive Economic Partnership Agreement (CEPA), which began in September 2024, concluded on 5 March 2026, during meetings involving Foreign Minister Toshimitsu Motegi, Al Jaber, and Minister of State for Foreign Trade Thani Al Zeyoudi.[12] Only the negotiations—not the CEPA itself—were concluded, as the agreement had not yet been signed or entered into force at the time of writing this article.[13]

Concluding the negotiations during wartime carried considerable political significance. Tokyo and Abu Dhabi continued to institutionalise their long-term economic ties even while addressing evacuations and oil supply. The CEPA facilitates

broad tariff elimination or reductions on Japanese exports, including on automobiles, automotive parts, iron, and steel.[14] More importantly, it reinforces the UAE's role as a commercial and logistics hub linking the Middle East, Africa, and South Asia.

The agreement also advances Emirati priorities. The UAE seeks Japanese participation in advanced manufacturing, space, healthcare, digital technologies, artificial intelligence (AI), clean energy, and critical-mineral supply chains. In October 2024, Mitsubishi Heavy Industries and the UAE Space Agency signed a contract for the launch of an asteroid belt probe.[15] The conclusion of CEPA negotiations during the war thus built on the agenda of expanding cooperation beyond oil and gas outlined in earlier ministerial consultations.[16] The CEPA therefore links wartime oil security with postwar industrial cooperation: Japan gains energy security and market access, while the UAE gains technology, investment, and support for economic diversification.[a]This broader energy partnership also covers Liquefied Natural Gas (LNG). In July 2026, INPEX signed a 15-year agreement with ADNOC to purchase one million tonnes annually from the Ruwais LNG project starting in 2028. Japanese buyers will account for approximately 23 percent of the project's capacity.[17] Although the agreement did not alleviate the immediate supply shortages during the crisis, it underscores Japan's strong interest in diversifying its long-term gas supplies through the UAE. In 2025, Japan imported 39.7 percent of its LNG from Australia and 14.8 percent from Malaysia, but only 1.0 percent from the UAE.[18] The UAE was viewed as a promising option for the diversification of supply sources.

Japan and Hormuz: Alliance Anchor or Diplomatic Tightrope?

Japan's response to the Strait of Hormuz crisis illustrates how Tokyo sought to reconcile three imperatives: preserving the US alliance, protecting energy security, and maintaining diplomatic room for manoeuvre with Iran and the GCC states. The US remained the central reference point. As the effective closure of the Strait threatened Japanese crude imports, Tokyo joined the response led by the International Energy Agency (IEA) and began reducing private stockpiling obligations on 16 March. By mid-May, improved alternative procurement made a planned third release unnecessary, while the reduced private-stockholding requirement remained through mid-June.[19]

At the same time, Tokyo resisted direct military involvement without turning that restraint into an alliance dispute. Before Takaichi's 19 March summit with President Trump, Washington had pressed allies and major energy importers to help secure the Strait. The Prime Minister explained in detail that Japan could act only within the limits of domestic law. Minesweeping while hostilities continued could constitute combat against the state that laid the mines. Japanese officials therefore indicated that such an operation could become legally feasible only after a complete ceasefire.

a Before the war, Japan's engagement with the UAE centred on stable oil supplies while increasingly emphasising trade, investment, and cooperation in advanced technology and clean energy. The CEPA negotiations, launched in September 2024, formed part of this broader agenda.

Trump had already stated on 17 March that the US no longer needed Japanese or allied naval assistance, and the summit instead produced agreement to maintain close coordination on de-escalation, maritime security, and energy supplies.[20] Japan nevertheless demonstrated support for freedom of navigation. On 19 March it joined a British- and French-led statement condemning Iran's de facto closure of the Strait, supporting safe passage, and welcoming coordinated strategic-reserve releases.[21]

Yet, Tokyo's position became more cautious as the European initiative acquired a more coercive character.[b] A chair's statement issued by the United Kingdom following the 2 April meeting mentioned possible "sanctions" against Iran if the Strait remains closed. [22] For Japan, which sought to preserve channels with Tehran and encourage US-Iran diplomacy, close identification with such measures risked narrowing its flexibility. It placed a high priority on ensuring the safe passage of its vessels stranded in the Persian Gulf at that time, and to that end, Takaichi held a telephone conversation with Iranian President Masoud Pezeshkian on 8 April. [23] At the 17 April UK-France virtual leaders' meeting, Takaichi therefore participated only through a written message, emphasising mediation, safe maritime corridors, and measures that Japan could undertake within its capacity rather than military enforcement or sanctions.[24]

By the summer, Japan was pursuing coordination with Washington alongside engagement with the Gulf littoral states through established diplomatic channels. Japan was concerned not only with reopening the Strait but also with its future rules. After the June US-Iran memorandum declared a cessation of hostilities, Tokyo repeatedly insisted that navigation be restored "without additional costs".[25] The issue became more salient as Iran and Oman discussed arrangements for passage and Iranian officials floated conditions for reopening it. Oman consequently assumed unusual importance as both a littoral state and a key interlocutor with Tehran. On 10 August, Takaichi told Sultan Haitham that free and safe navigation must be restored without additional costs and emphasised that consultations on the future arrangements for passage through the Strait should involve the states using it.[26]

Foreign Minister Motegi's 17–22 August visit to Saudi Arabia and Oman reinforced this approach. He emphasised de-escalation and free and safe navigation. In Muscat, he called for discussions involving littoral and user states. Saudi Arabia mattered not only as Japan's largest strategic oil partner and as the source of an alternative export route through the Red Sea, but also as a major Gulf power sharing an interest in preventing unilateral restrictions or charges on Hormuz traffic.[27]

Japan's policy was, therefore, not a choice between Washington and the Gulf. Instead, Tokyo anchored its security policy in the US alliance while using energy policy. It sustained diplomacy

b This divergence may reflect differing priorities: European leaders placed greater emphasis on pressuring Iran to uphold freedom of navigation, while Japan attached particular importance to preserving dialogue with Tehran and securing safe passage for its vessels.

with Saudi Arabia, Oman, the UAE, and Iran to protect freedom of navigation and prevent the postwar order in the Strait from being shaped without the interests of major importing states.

Ranking the Partnerships

Among the six GCC states, Saudi Arabia and the UAE clearly occupy the top tier, albeit for different reasons. Saudi Arabia ranks first in present-day indispensability because of its crude-oil volumes, production capacity, regional weight, and the breadth of cooperation under Vision 2030. The UAE ranks first in institutional breadth and future potential. Crude oil, joint stockpiles, Japanese upstream interests, LNG, trade, investment, and advanced technology have been integrated into a single relationship that is now further reinforced by the CEPA negotiations.

The UAE is Japan's strongest institutional partner. Its relationship with the latter connects immediate crisis response with formal economic integration and long-term LNG supply. Yet Japan's overall energy security remains impossible without Saudi Arabia. In practice, Riyadh and Abu Dhabi are the twin pillars of Japan's Gulf policy.

Figure 1: Japan-GCC High-Level Meetings, 28 February-3 September 2026

GCC counterpart	PM Takaichi	FM Motegi	EM Akazawa	FM Katayama	Total
UAE	2	2	5	0	9
Saudi Arabia	1	4	6	0	11
Oman	2	4	1	0	7
Qatar	1	2	1	1	5
Kuwait	1	3	1	0	5
Bahrain	0	1	0	0	1
Total	**7**	**16**	**14**	**1**	**38**

Note: Counts include in-person and telephone/online meetings recorded.
Source: Author's compilation based on releases from Japan's Ministry of Foreign Affairs, Ministry of Economy, Trade and Industry, and Ministry of Finance.[c]

c The author compiled the figures from individual meeting announcements published on the official websites of Japan's Ministry of Foreign Affairs, Ministry of Economy, Trade and Industry, and Ministry of Finance, covering meetings held between 28 February and 3 September 2026.

As the previous section has indicated, Oman's importance to Japan has grown rapidly, particularly since August. Tokyo increasingly recognises that, as a country located south of the Strait of Hormuz, Oman will be a key stakeholder in determining the future status of the strait. As mentioned earlier, Prime Minister Takaichi held a telephone conversation with Sultan Haitham in August, and Foreign Minister Motegi visited the country. Consequently, Oman has temporarily assumed a level of importance for Japan comparable to that of Saudi Arabia and the UAE.

Qatar follows because of LNG, as highlighted by JERA's February 2026 agreement with QatarEnergy to purchase approximately three million tonnes annually for 27 years beginning in 2028.[28] Its relationship with Japan, however, remains more concentrated in gas. Kuwait is a trusted oil supplier; Bahrain offers strengths in finance and digital services. None, however, matches the scale or breadth of Japan's partnerships with Saudi Arabia and the UAE, particularly in economic and energy terms.

Conversely, GCC interest in Japan is strongest in the capabilities required for industrial upgrading: technology, investment, local manufacturing, training, and research. Automobiles, steel, chemicals, power, healthcare, AI, robotics, space, logistics, hydrogen, and ammonia are especially relevant. For example, the Japanese company TIER IV and the Saudi Arabian company Elm signed a memorandum of understanding (MoU) in September 2025 to develop and deploy autonomous mobility solutions.[29] Gulf governments seek not merely finished products but cooperation that generates domestic production, employment, and technological capacity.

The war therefore revealed that Japan-GCC relations are not a one-way dependence on resources. Japan relies on Gulf energy, while the GCC states value Japanese capital, technology, and industrial expertise. Japan's early diplomacy was constrained by the need to coordinate with the US and evacuate its national priorities. However, Tokyo subsequently secured oil supplies through Saudi Arabia and the UAE, concluded CEPA negotiations with Abu Dhabi, and expanded long-term LNG cooperation. The essential shift is from a traditional energy relationship to a broader economic-security partnership in which each side has become strategically indispensable to the other.

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3

The Heavier Side: India's Asymmetric Balancing in the Gulf

Md. Muddassir Quamar

The war triggered by United States (US) and Israeli attacks on Iran on 28 February 2026, has created serious challenges for the global community, especially as it has affected international supply chains and energy security. Bearing greater consequences are international stakeholders that have significant engagements in the region and have structural dependence on the Gulf for energy security. India too, has been affected, particularly as it has multifaceted interests and engagements in the region. These interests largely centre on energy security, the safety of Indian expatriates, maritime security, and free and uninterrupted access to sea routes. India also has growing economic and security engagements with the Gulf Cooperation Council (GCC) states.

Based on an assessment of India's Gulf policy before the war and its response to developments during the war, this article argues that Indian policy has focused less on strategic balancing and more towards solidarity with its Gulf Arab partners. This approach can be mainly attributed to New Delhi prioritising its growing and multifaceted strategic interests vis-à-vis the GCC states, in comparison to its limited ties with Iran.

Baseline and Evolution

Over the recent decades, India's strategic engagements with countries of the Gulf region have become diverse and multidimensional. India's dependence on the Gulf for energy security and its concerns about the safety and security of the nearly 10 million Indian expatriates—together with growing trade, business, and investment ties and expanding defence and security cooperation—have made the Gulf 'strategic' in India's foreign relations.

Historically, ever since India began a gradual recalibration of its foreign policy in the post-Cold War era, it has adopted a bilateral approach in engaging the Gulf region. Relations with important regional countries, such as Iran, Oman, and Saudi Arabia, were cultivated in the 1990s and the early 2000s. During this early period of outreach, the complementarity of India's growing reliance on

energy imports from the region and migration of Indian labourers to the GCC states served the relationships well. Gradually, India also developed ties with smaller Gulf states, including Bahrain, Kuwait, Qatar, and the United Arab Emirates (UAE). Consequently, India-Gulf economic and energy relations improved notably in the 2000s, with the bulk of trade constituting India's oil and gas imports.

Nonetheless, the improved trade relations did not translate into a more regional approach, as the initial India–GCC free trade agreement (FTA) talks that began in 2004 could not be realised. Bilateral priorities varied by partner: energy and religious pilgrimage with Saudi Arabia, liquefied natural gas (LNG) with Qatar, maritime cooperation with Oman, and trade and investment with the UAE.

Under Prime Minister Narendra Modi, especially during his first term (2014–19), the same bilateral approach to the Gulf states continued with greater rigour and accelerated political and diplomatic engagements. However, some new trends were discernible soon after he settled in. For one, the prime minister prioritised engaging the UAE, choosing it as his first destination to visit in the Middle East in August 2015. He followed this up with a number of political and diplomatic engagements, developing a personal rapport with the then Crown Prince of Abu Dhabi and now the President of the UAE, Sheikh Mohammed Bin Zayed Al-Nahyan. Consequently, India-UAE relations developed faster and grew stronger to acquire a strategic dimension. Yet, this did not come at the cost of bilateral relations with other GCC countries, as relations with Saudi Arabia, Qatar, and Oman also improved, while engagements with Bahrain and Kuwait continued. With Iran, though, Modi adopted a more cautious approach, as New Delhi focused on improving relations with the GCC states, and with the US and Israel. Nonetheless, India and Iran's cooperation on the Chabahar Port development continued.

The situation evolved during the second term (2019–24) of Modi's premiership, as Indian foreign policy ambitions grew and New Delhi focused on creating a more noticeable Indian presence on the global stage.[1] In functional terms, it meant engaging all sides (including the US, Russia, and China), increased multilateral and minilateral engagements (such as the Quad and BRICS), and accelerating cooperation in the immediate and wider neighbourhoods. New Delhi's focus on vaccine diplomacy during the COVID-19 pandemic in 2021–22, and the fanfare and vigour in the hosting of the G20 summit in 2023, are also cases in point of India projecting a more global approach in its foreign policy. These have signalled India's more holistic approach in dealing with important geographies, especially those in its vicinity in the Indian Ocean Region.

New Delhi has begun to adopt a more regional approach in the Gulf,[2] particularly in defence engagements, focusing on maritime and coastal security, cooperation in counter-terrorism, combating organised crime, regular joint defence exercises, and defence trade. In the Gulf of Aden, for instance, India deploys its naval ships to secure Indian commercial vessels against piracy.[3]

New Delhi's participation in minilateral strategic projects during the Modi era—such as the quadrilateral I2U2 (with Israel, the US and the UAE), the India–UAE–France trilateral partnership, the US-led Combined Maritime

Force (CMF) based in Manama, and its proposal of the India-Middle East-Europe Economic Corridor (IMEEC)—all point to a reversal of its earlier risk-averse nature.

It is worth singling out India's bilateral relations with the UAE, forged by the 2022 Comprehensive Economic Partnership Agreement (CEPA) in 2022 and later extended into a Framework for Strategic Defence Partnership in May 2026. India-UAE political, diplomatic, economic, security, and cultural engagements have since improved, as visible from frequent bilateral visits, increased two-way flow of investments, and an increased number of Indian expatriates (recorded at 4.34 million as of January 2026).[4]

Besides Arab Gulf partners, India continues to engage with Iran despite the US and international sanctions affecting relations. Indian investments and operational involvement in Iran's Chabahar Port continued at least until April 2026, when the US exemption came to an end, with New Delhi stating that it would review the situation in the light of the new development.[5]

Indian involvement in the Chabahar project has been described both as interest-oriented for connectivity to Afghanistan and Central Asia, and as a sign of India's strategic autonomy in an increasingly polarising international politics. India's continued relations with Iran are also explained in terms of its security concerns vis-à-vis Afghanistan, and religious and cultural connections—especially among the Shia population in the union territories (UTs) of Jammu & Kashmir, and Ladakh—as Iran has a Shia majority population. India's growing strategic partnerships with the GCC states and its continued ties with Iran, are therefore viewed as a sign of delicate strategic balancing in the Gulf region.[6]

Arguably, the strategic balancing was easier when New Delhi followed a bilateral approach, underlining that extraneous factors had minimal impact on India's relations with different countries in the region. However, as New Delhi is now adopting a more regional approach, the policy of strategic balancing has come under stress. This is due to the eruption of regional conflict theatres since the 7 October 2023 attacks on Israel, leading to the war in the Gaza Strip and Lebanon, and later to disruptions in the Red Sea region and to the eventual US-Israel war on Iran. India has endeavoured to safeguard its interests in the region, while managing relations with the US, Israel, Iran, and the Gulf Arab states.

The Impact of the War

India has been seriously impacted by the Iran war. Energy security, the Hormuz blockade, safety and security of expatriates, and disruptions in trade, business and investments, have all emerged as important issues. Despite years of effort to diversify sources of oil and gas imports and the share of renewables in its energy basket, India's dependence on oil and gas imports from the Gulf continues to remain significant. Trade statistics show that during 2025–26, India's total oil and gas import bill was US$203.4 billion, of which US$91.47 billion was from the Gulf region—nearly 44 percent.[7]

The outbreak of the war in the Gulf, the Hormuz blockade, stranded shipping, shortage of energy supplies and the subsequent rise in fuel prices, have all made travel and transportation costlier, impacting the prices of food and essential commodities.[8] Bilateral trade with the Gulf region has also been affected, impacting the supply of fertilisers and petrochemicals from the Gulf, which in turn has affected India's agriculture and manufacturing sectors.

Indian exports to the region have also been seriously impacted, causing concern among the business community and trade analysts.[9] There are serious concerns too, over the flow of remittances and investments from the region and about the safety and security of Indian investments, especially if the conflict prolongs and fighting continues.

Besides energy security and economic impact, the safety of Indian nationals in the region is a serious issue. The attacks on the GCC countries by Iran and on the ships passing through the Gulf, resulted in 16 Indian nationals losing their lives, including 10 seafarers, while 75 others were injured.[10] This led India to "strongly urge" Iran to end all attacks on international shipping in the Hormuz strait.[11] On 14 July 2026, India's Ministry of External Affairs (MEA) summoned the Iranian deputy chief of mission (DCM) in New Delhi to register "strong protest" over the killing of an Indian sailor in an Iranian attack on two UAE-flagged ships.[12] The issue has resonated in the Indian Parliament, with several leaders raising it during the monsoon session, urging the government to take measures to ensure the safety and security of Indians abroad. As early as March 2026, the Indian Navy deployed warships and destroyers in the Gulf of Oman to ensure security of Indian shipping and energy security.[13]

While some of the immediate impacts have been contained by undertaking contingency measures, one of the most serious concerns for India is the safety and security of the nearly 10 million Indian nationals residing and working in the GCC countries.[14] Besides their physical and financial security, these expatriates are a major source of remittance to India. India is the top remittance recipient country in the world, and in 2025 it received US$135.4 billion in inward remittances.[15] Estimates suggest that nearly 25–30 percent came from the Gulf region.

India's Response

The response of the Government of India has been on predictable lines. New Delhi has refrained from directly or indirectly joining the war and has avoided taking sides. It was measured in reacting to the US and Israeli strikes on 28 February 2026, expressing "concern" and calling for "restraint" and "de-escalation", but without explicitly condemning the actions.[16] India also took time in reacting to the assassination of Supreme Leader Ali Khamenei and expressed formal condolences through Foreign Secretary Vikram Misri,[17] while it was quick to condemn the Iranian attacks on Gulf countries with Modi and external affairs minister, S. Jaishankar, holding telephonic conversations with leaders and counterparts in the GCC countries.[18]

The Indian delegation at the funeral of Khamenei in July was led by Governor of Bihar (a state in eastern India) Lt Gen Syed Ata Hasnain (retd.), and junior minister in the

external affairs ministry, Pabitra Margherita, although many Indian political, civil society and religious personalities attended on Iranian invitation.[19] India also issued advisories warning its nationals against undertaking travel to Iran. In terms of official engagement, the prime minister had a teleconference with Iranian president, Masoud Pezeshkian, on 12 March 2026. Notably, the Indian government's press release on the conversation did not mention Modi condoling the death of Khamenei.[20]

Meanwhile, India's response to the attacks on the Gulf and international shipping, and the blockade of the Strait of Hormuz, were more forthcoming. India expressed concerns and condemned the Iranian attacks on the Gulf on several occasions.[21] It co-sponsored the United Nations Security Council (UNSC) resolution condemning Iranian attacks on Gulf countries, while its permanent representative in the UN, P. Harish, expressed serious concern on the Hormuz blockade during a UNSC discussion on the issue in July.[22]

Prime Minister Modi visited the UAE on 15 May, while several other high-level engagements took place between India and the Gulf states during the war.[23] The Gulf states were also forthcoming in responding to Indian needs, with the UAE increasing oil exports and agreeing to increase its contribution to strategic oil reserves in India.[24] Contrary to the Khamenei's killing and funeral, upon the passing away of the former Emir of Qatar, Hamad bin Khalifa Al-Thani, on 12 July, India declared a day of mourning and was represented by Cabinet Minister for Parliamentary Affairs Kiren Rijiju at the funeral.[25]

Conclusion

India's strategic balancing remains intact in principle, but the weight of its expanding economic, energy, and security partnerships with the Gulf Arab states has made that balance increasingly asymmetric—with the GCC firmly on the heavier side. Under Prime Minister Modi, India's Gulf policy has gradually shifted from strict bilateralism towards a more regional approach—one that engages all sides, while prioritising its growing strategic interests with the GCC. The Iran war has sharpened this tilt: New Delhi condemned Iranian attacks on the Gulf and co-sponsored the UN Security Council resolution against Tehran, while stopping short of condoning the strikes by the US and Israeli. Simultaneously, it has not severed ties with Iran, as evidenced by its representation at Khamenei's funeral and the recent endorsement of the Bishkek Declaration at the Shanghai Cooperation Organisation (SCO) summit.

New Delhi's multi-alignment remains contingent on its national interests: energy and maritime security, safety of Indian nationals and businesses, uninterrupted trade, business and investment opportunities, connectivity to Afghanistan and Central Asia, and close cultural and religious linkages. At the functional level, this has meant that the Indian response to the Iran war has tilted towards expressing solidarity with the Gulf Arab states, without necessarily condoning or condemning the attacks on Iran by the US and Israel, and concurrently persisting with engaging Iran.

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4

Involvement Without Commitment: China and the Gulf Amidst the Iran War

Ahmed Aboudouh

In July 2026, the Chinese Deputy Permanent Representative to the United Nations (UN) accused the US of "creating new conflicts and turmoil in the Middle East."[1] China is the Gulf states' largest trading partner and played a key role in facilitating the 2023 Saudi-Iran rapprochement agreement, which has since paved the way for regional de-escalation. However, China's continued supply to Iran of dual-use technology, satellite imagery, and the Baidu Navigation System to enhance its targeting capabilities may intensify the Gulf Arab states' balancing act with the US.[2]

From a broader perspective, China has adopted an approach of involvement without commitment towards the ongoing war in Iran. This positioning is designed as a risk-mitigation insurance policy, not a diplomatic manoeuvre to gain more influence. Beijing has consistently called for a ceasefire, the reopening of the Strait of Hormuz for international trade, and compliance with the initial memorandum of understanding signed in June as a foundation for a lasting, comprehensive agreement between Washington and Tehran.[3] However, China's subsequent diplomatic altercation with the US reflects its frustration with the resumption of the war, which has complicated its posture in the Middle East and created several risks to its energy supplies and investments. Notably, the war is unlikely to strain Beijing's cooperation with the Gulf states, but it may instead deepen the latter's hedging strategy.

Challenges for China

Several challenges have prompted policymakers in Beijing to adopt a cautious stance, alongside attempts to taint the US image globally and preserve what remains of China's balancing act between Iran and the Gulf states.

First, the energy crisis has weighed on China's stagnant economy. China was compelled to slash oil imports by 40 percent, from 11.5 billion barrels per day (bpd) before the war to an average of 8 million bpd in June.[4] This reduced demand has been partly driven by a structurally weaker

economy, as the property market and domestic consumption remain stagnant despite the end of a deflation streak over several years.[5] The energy crunch may have structural effects, accelerating electrification and the transition to renewable sources amidst lower long-term demand for oil, diesel, and petrochemicals. Chinese exports will also depend on global demand, which is projected to slow—in July, the IMF revised its global GDP growth to 3 percent, down from its January forecast of 3.3 percent.[6] China's GDP projection has been lowered to 4.4 percent.[7] This means a stagnant global economy, driven by the war, will put pressure on China's exports, the key driver of growth.

Second, the conflict has demonstrated that the Middle East is low on China's list of consequential regions. The region's hierarchy was institutionalised during the 2025 Central Conference on Work Related to Neighboring Countries, where China's 'periphery diplomacy' was elevated in significance above relations with great powers, including the US, while the Middle East came below both as an integral part of the Global South.[8] This suggests that the war might directly affect China's interests, but from a national security perspective, it is less consequential or strategic than instability in the South China Sea or the Taiwan Strait. Although China has been criticised as an unreliable alternative security partner to the US in the Gulf,[9] this narrative ignores local perceptions. Gulf countries do not expect Beijing to ride to their rescue. They understand that China's modus operandi is predicated on economic statecraft, not military alliances or security guarantees. Indeed, they are not deluded about the structural motivations behind China's caution and will not let this become a source of friction in their trade, investment, and industrialisation partnerships.

Nevertheless, China's global governance outlook, to which the Gulf is central, may have taken a hit, especially its anti-US stance on regional security (which covers Iran). For instance, in May, China postponed the Second China-Arab Summit, scheduled for mid-June in Beijing, in which reconciliation was expected to be a main theme.[10] By continuously targeting Gulf states, Iran is effectively undermining China's model of reconciliation established by overseeing the Iran-Saudi rapprochement agreement in 2023. The deal is seen as the diplomatic foundation of China's touted "new security architecture"[11] in the Gulf, as part of its Global Security Initiative.[12] The initiative is built on "six commitments" that aim to counter US alliances globally by promoting inclusivity through "common, comprehensive, cooperative, and sustainable security," and "indivisible security," urging that no country build its own security at the expense of others. It also promotes UN centrality through state sovereignty, dialogue, and non-interference. If it collapses, China's diplomatic posture may revert to square one.

Third, regional trust in the US as a reliable security guarantor has diminished, deepening China's insecurity and elevating uncertainty about the future of its oil supplies, trade, and investments in the Gulf. While the US-led security architecture may continue to underpin regional order, volatility and high-risk assessment may become the new normal, at least in the short term. Beijing's assumptions about the region and

subsequent policies may require a shift to adapt to the new, more dangerous reality. In other words, the crisis may undermine China's free-riding on the Gulf's US-led security umbrella, even as competition in the Indo-Pacific intensifies. This shift matters in the absence of a formulated, official strategy in Beijing on how the Gulf should look beyond aspirational offerings.

No Dramatic Shifts

The Gulf Arab states are under no illusion about China's security role, given its hesitation to intervene meaningfully before and during the Iran war. Despite that, China-Gulf relations have endured and are likely to consolidate further. Gulf states, particularly Saudi Arabia and the United Arab Emirates (UAE), are expected to deepen their engagement with China in renewable energy, electric vehicles (EVs) and batteries, and infrastructure. For instance, Abu Dhabi Crown Prince Sheikh Khaled bin Mohamed bin Zayed visited China in April, met with Chinese President Xi Jinping, and signed 24 trade and investment deals, especially on clean energy.[13]

The war has shifted the emphasis on clean energy from environmental concerns to energy security. China, as the global leader in clean energy and EV manufacturing, will benefit from a surge in exports, which increased by more than 30 percent globally in the first half of the year.[14] The gains will include industrial localisation and technology transfer, thereby elevating Gulf Cooperation Council (GCC)-China trade. However, negotiations on the China-GCC free trade agreement might stall amidst heightened concerns about Chinese overcapacity and internal frictions in the Gulf, especially between Riyadh and Abu Dhabi. Chinese investors and contractors could also be involved in infrastructure projects related to bypassing Hormuz initiatives, as they tend to have greater risk tolerance than their Western counterparts.[15] Additionally, Gulf sovereign wealth funds are expected to double down on investing in the Chinese market,[16] especially in energy, petrochemicals, financial markets, and biotech.

The war has created incentives for Gulf states to diversify arms suppliers, particularly for capabilities relevant to asymmetric warfare, including drones, ballistic missiles, air defence, and electronic warfare. This incentive has proven especially crucial after Washington's ammunition supplies came under strain, leaving it unable to supply its partners with critical replenishments of their ammunition stocks.[17] For Gulf states, Chinese arms could simultaneously replenish depleted stocks in non-Western systems, provide relatively affordable alternatives, and serve as leverage against Washington over restrictions on advanced platforms. China has already supplied Saudi Arabia[18] and the UAE with Wing Loong UAVs, the UAE with L-15 aircraft and other ground systems,[19] while Kuwait revealed a Chinese factory for light and medium ammunition is nearly complete.[20] China's expanding global defence portfolio for external buyers includes the J-10CE and JF-17 fighter jets, the HQ-9/FD-2000 air defence systems, and advanced unmanned platforms.[21] Additionally, the combat performance of Chinese systems in the 2025 India-Pakistan conflict has improved perceptions of their credibility.[22]

For the Gulf, these systems are attractive options amidst post-war procurement diversifications.

However, several challenges may hinder this cooperation. Deep integration with predominantly Western military systems makes wholesale Chinese substitution operationally costly. The Gulf states remain heavily dependent on the US. It is inconceivable that this will change anytime soon, despite the US's perceived unreliability. Moreover, Chinese technological assistance to Iran creates a political dilemma for the UAE, given its exposure to Iranian missiles and drones.

These factors limit future China-Gulf defence cooperation to military diplomacy, training, industrial localisation, and the purchase of less technologically sophisticated systems. Arms and tech transfer deals may likely focus on UAVs, air defence, and joint production. Such cooperation complements the Gulf drive, especially in Riyadh and Abu Dhabi, for defence-industrial autonomy, while Chinese financing, lower prices, and access to dual-use technologies offer additional advantages.[23]

The China-Iran defence partnership is likely to remain a source of concern in the Gulf. However, it is not expected to negatively affect Chinese investments in the Gulf's economic vision. Gulf states have neither enough leverage to convince Beijing to restructure its Comprehensive Strategic Partnership with Iran, nor do they think they do. The Gulf states have long sought to keep the density and quality of their cooperation with China ahead of and more valuable than China's bilateral relations with Iran. The war may invigorate this approach, alongside diplomatic engagement, as a viable strategy for incorporating their concerns and security interests into China's calculations. For instance, it was reported in July that the Gulf states reached out to China to convince it to push Iran to reopen the Strait, as their trust in the Trump administration has waned.[24]

This balancing has challenged the assumption that China views its partnership with the Gulf states as superior to that with Iran because it focuses exclusively on measuring economic collaboration. Instead, Beijing's policies are transactional, providing each partner with what fits its needs, priorities, and strategic context. It is not unimaginable, for example, to see a spike in Chinese exports of drones and other weapons systems to the Gulf states after the war to balance Beijing's alleged dual-use tech sales to Iran.

Finally, Gulf states and Iran may calculate that, once the war eases, China is well positioned to oversee any reconciliation or regional security arrangements. Saudi Arabia is reportedly working to organise and host a Gulf-Iran reconciliation summit in Riyadh.[25] Any such agreement may require other mediators to facilitate talks first, with China already having proved its preference for symbolic involvement. For instance, in the 2023 negotiations and in the US-Iran negotiations in Pakistan, China's role was to facilitate and encourage talks, not to risk assuming the mantle of mediation. However, this will require Iran to stop targeting Gulf countries, a minimum level of internal GCC alignment, and achieve a lasting ceasefire with the US and Israel. Despite these challenges, China will likely encourage and participate in any talks aimed at reducing the US preponderance and influence over regional states' policies.

Conclusion

China's involvement in the Gulf since the war, and the Gulf states' reaction and potential future posture, demonstrate that not only has US security reliability decreased, but its policies have also become a source of conflict and instability for regional governments. The main short- to medium-term lesson, however, is that Israel's influence over decisions of war and peace in the Middle East, particularly since Donald Trump returned to the White House in 2025, has outweighed that of Gulf states, creating the structural conditions for intensified Gulf hedging between Washington and Beijing going forward. The Gulf aims to leverage cooperation with China in trade, investments, the energy transition, and industrialisation to maximise its leverage over the Trump administration's decision-making in the region.

However, Iran's hostility towards the Gulf, Trump's volatility, and Israel's objectives may complicate China's approach of promoting inclusivity and de-escalation in the region. Beijing may use this new reality of intermittent negotiations and conflict to challenge Washington's global credibility, but it may be unable to change it, putting its interests at the mercy of shifting security dynamics. This will force China to diversify its energy supplies and investments towards other regions until high certainty is restored.

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5

France's Gulf Moment: Between Momentum and Commitment

Souhire Medini

Operation Epic Fury, launched by the United States (US) and Israel against Iran in February 2026, found European and Gulf states, both allies of Washington, sharing a common approach. They sought to counter Iran's attacks while maintaining a defensive posture by refusing to participate in US and Israeli military operations—a challenging tension to navigate. This convergence was evident as early as 5 March 2026, in a meeting between European ministers and their counterparts from the Gulf Cooperation Council (GCC).[1]

Since then, a situation of "neither war nor full peace" has intermittently exposed the Gulf countries to attacks from Iranian missiles and drones. This new reality is likely to reinforce the Gulf countries' willingness to diversify their partnerships by adding 'layers' to their protection architecture. However, neither European nor GCC countries aim to diminish the US's engagement in the region. Instead, their objective is to encourage Washington to use its power and influence in a way that accounts for their own interests.

As long as the US remains the primary security guarantor in the Middle East, their rapprochement with Europe is the least politically costly option for GCC countries. Unlike engagement with China, this friendly hedging does not antagonise Washington. For Europeans, this is an attempt to position themselves as a "credible pillar within a 'US-plus' security framework."[2] Such a development would support the burden sharing that the current US administration insists on.

Besides a genuine common will to enhance 'bloc-to-bloc' cooperation between the European Union (EU) and GCC, the reality is that when the Gulf region called for military assistance needed for national defence, only individual European member states could offer it. In a way, the war with Iran has underscored the need for a more flexible strategy based on state-to-state cooperation.[3] Against this backdrop, France may have emerged from the war as the natural leader for a deeper Europe-Gulf strategic partnership. To confirm and solidify its position as the preferred European security partner in the Gulf region, Paris will have to demonstrate that its commitments are reliable in the long run.

A "French Momentum" After the Iran War?

During the 40-day war on Iran, France was the European country that provided the most rapid and visible support to the Gulf countries. Despite not being directly involved in Operation Epic Fury, the French military used its capabilities, including Rafale fighter jets, airborne radar capabilities, and anti-aircraft defence systems, to defend the Gulf countries that requested assistance. Official reports have not revealed the degree of French assistance to the Gulf countries, but it is worth noting that French President Emmanuel Macron himself publicly highlighted France's swift reaction and how it shot down several drones in the initial hours of the conflict.[4] French ambassadors in the region echoed these remarks.[5] Some of these assets were already deployed in service of ongoing military exercises or operations, reflecting the strong military ties between France and its Gulf partners. Based on these developments, the belief that the war has reinforced France's momentum in the Gulf is a common perception among French senior officials.

France's swift reaction was enabled by a network of bilateral agreements formalised before the war. This reflects a decades-old strategy of strengthening ties with the Gulf partners, particularly in defence. The strategy gained traction following France's intervention during the 1979 attack against Makkah's Grand Mosque in Saudi Arabia. France's role at that time was seen as crucial, and it helped to establish a relationship of trust.[6] France has maintained a permanent naval, air, and ground presence in the UAE since 2009, including a naval base, an air base in Al Dhafra, and a land training centre.

Over the past decades, French arms sales to the Gulf countries have increased, the Rafale being the main selling product in France's defence procurements. In 2021, the UAE Armed Forces signed an order for 80 Rafale fighter jets, which was presented as an "undeniable tool for sovereignty and operational independence."[7] Qatar's acquisition of 36 Rafale fighter jets in 2019 also led to technology transfers[8] and training programmes for several hundred Qatari military personnel in France. Last February, a defence cooperation agreement was signed between France and Bahrain, just a few weeks before the start of the war.[9] In September 2026, the French president made public France's willingness to send military assets to protect energy sites in Saudi Arabia threatened by the Iran-backed Houthi militia in Yemen. In doing so, he indicated that France remains ready to respond to requests for support from countries in the Gulf region.[10]

Other European countries have also played a role during the war and forged important ties with the Gulf states, but France has arguably the most comprehensive relationship. The United Kingdom (UK) has deep historical ties with the Gulf region, but its status outside of the EU prevents London from being part of EU-wide missions such as the Aspides mission in the Red Sea. Launched in 2024,[11] this mission is a manifestation of a European defence in the Middle East. Germany, for its part, is an industrial power that could help answer to the Gulf countries' armament needs, but it is not perceived as a reliable military power engaged in the region. Italy also plays an important role, particularly in the maritime domain, but it has neither developed a comparable network of bilateral defence agreements with the GCC countries nor built strong interdependencies through arms sales.

Between Caution and Commitment

During the war, the French government struggled to define the boundaries of its involvement. Within France, concerns were raised about the perceived discrepancy between the stated defensive posture and the deployment of substantial military resources.[12] Critics also questioned France's decision to allow American military support aircraft, though not combat aircraft, to be stationed at the Istres air base in France, following assurances from the US that these aircraft would not be involved in offensive operations in Iran.[13]

In comparison, Spain's decision to deny US forces permission to use joint military bases at Rota and Moron for any actions related to the war in Iran[14] was perceived as more consistent. France's approach illustrates the fine line Paris has sought to navigate: avoid being perceived by Iran as a belligerent, while demonstrating that it is a reliable and capable partner.

The decision of Paris to invest in this relationship to this level is driven by deep-seated strategic, political, and economic motivations. The Gulf countries have financial strength that is obviously of interest to France, as well as other European countries. As noted by the national agency serving the international development of the French economy at an event dedicated to the cooperation between France and GCC countries, "Gulf partners bring scale, rapid execution and an ambition to lead in adopting new technologies and services."[15] France also stands to gain serious and strategic partners in the political arena, and Paris is keen to coordinate with the Gulf countries on major political initiatives aimed at stability in the region. In 2025, France and Saudi Arabia jointly launched an initiative on the implementation of the two-state solution, which, despite US' initial skepticism, was later referenced in US President Donald Trump's Gaza peace plan.[16]

France and the GCC countries, therefore, have clear interests in deepening their relations with each other. To transform the perceived French momentum into concrete partnerships and confirm this trajectory, Paris will need to overcome several challenges.

Challenges Ahead

France's capacity to establish itself as the leading country in strengthening relations between France and the GCC is intrinsically linked to its ability to unite Europe and to continue doing so. France may drive and facilitate the Europe-Gulf strategic partnership, but a team effort will be needed. Despite repeatedly demonstrating that it can deploy meaningfully and rapidly in case of need, its military capacities are not those of the US or China. France is better placed than the rest of Europe to strengthen engagements with the GCC because of its credibility as a force multiplier, especially at the EU level.

During the war, France demonstrated this potential, particularly in the maritime domain. Its naval task force, comprising eight frigates, two helicopter carriers, and the flagship *Charles de Gaulle*, was deployed from the Eastern Mediterranean to the Red Sea, joined by the Netherlands, Spain, Italy, and Greece.[17] The Gulf countries will closely watch France's ability to leverage Europe's joint national security architecture and to strengthen a consensus in favour of European engagement in the Gulf

region's security. The launch of the Aspides mission was a valuable contribution to protecting freedom of navigation. Only Italy, France, and Greece, however, have deployed assets continuously since the start of this operation.[a]

One way to encourage broader European engagement in the Gulf region security would be to demonstrate that the Gulf countries have an interest in the security of the European continent, for example, by providing concrete support to Ukraine. Such mutual rapprochement could build on the relationships forged between Ukraine and several Gulf countries on drone cooperation during the war.[18] The trauma of Iraq's 1990 invasion of Kuwait made the Gulf countries committed to the principle of sovereignty and respect for borders, which resonates with Russia's behaviour in Ukraine. The Gulf countries undoubtedly were angered to learn US officials' confirmation that Russia had covertly supported Iran during the war, including by providing satellite imagery and intelligence.[19] European officials would hope that this serves as a wake-up call. Greater convergence of perspectives could then help unlock additional European assets for future required collective response in the Gulf region.

Another challenge for France will be to reassure the Gulf countries that its growing network of alliances in the region stems from a cross-party consensus that no leadership change will dramatically impact. The Gulf states are also aware of how domestic politics could affect foreign relations and how serious political difficulties could jeopardise their confidence in the country as a solid and trustworthy partner. As France is due to hold pivotal presidential elections in 2027, the French government will need to reassure its partners in the Gulf that a change in leadership will not undermine the predictability that the Gulf states have found in Paris, at a time when the press regularly echoes the frustrations expressed by the region's leadership over the evolution of their security partnership with Washington.[20]

A Mirror Strategy: Reflecting Gulf Expectations in France's Ambitions

Being the engine of Europe's strategic rapprochement with the Gulf region implies that France should bridge the gap between what Europe offers and what the Gulf countries need. Europe is not the only geopolitical actor towards which the Gulf countries are turning in their quest for diversification. France and Europe are ultimately seeking strategic depth, defence export markets, and political partners to enhance stability in the region. To succeed, they will need to be shape these goals around what the Gulf countries expect from their future strategic partners.

a According to discussions the author of this essay had with European officials.

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6

From Machinery to Missiles: Italy's Gulf Entanglement

Leo Goretti

On 3 December 2025, Italy's Prime Minister Giorgia Meloni attended the 46th Gulf Cooperation Summit in Manama, Bahrain as chief guest. Besides participating in the proceedings, Meloni held bilateral meetings with the Crown Prince and the King of Bahrain, the Amir of Kuwait, the Sultan of Oman, and the Crown Prince of Saudi Arabia.[1] In Manama, Meloni stressed the opportunities for deepening cooperation between Rome and the Gulf countries in different areas: economic partnership, both in the energy and trade domains; security, working together towards "overcoming divisions" and "global security"; and diplomacy, with Rome looking forward to organising a 'Med-Gulf' forum in the near future.[2]

This strategy is consistent with a long-term priority that has emerged in Italy's foreign policy since the 1980s: that of assuming a protagonist's role in the 'Enlarged Mediterranean', an imagined geopolitical space that emphasises the connections and interdependence between a number of regions neighbouring the Mediterranean Sea. Usually, the Gulf is seen as an integral component of the Enlarged Mediterranean, being at the crossroads between the Levant, the Indian Ocean, the Horn of Africa, and Central Asia.[3]

Through the decades, Italy's engagement with the region has manifested primarily through security-related initiatives. This includes participation in capacity-building programmes (for instance, contributing to the North Atlantic Treaty Organization [NATO] training missions in Iraq); counter-piracy operations (e.g. European Union Naval Force [EUNAVFOR] Atalanta in the Western Indian Ocean and Red Sea); bilateral defence cooperation; and trade relations, which grew significantly through the 2000s, in particular with the United Arab Emirates (UAE) and Saudi Arabia. Political engagement with the Gulf region (and the Middle East at large) has instead traditionally been firmly embedded within the wider EU and transatlantic frameworks, with Rome usually refraining from taking a proactive and distinctive position on the most crucial

regional issues, such as the Palestinian question and the Iran nuclear dossier.[4]

In recent years, following the invasion of Ukraine, the Italy–Gulf engagement has further deepened as a result of Rome's need to secure energy suppliers other than Russia. Qatar especially reinforced its position as a key provider of natural gas to Italy, and bilateral trade steeply increased (Qatari exports to Italy grew by 234 percent in the first nine months of 2022).[5] This augmented relationship was put to the test at the end of February 2026, when the US and Israel launched their attack on Iran, which was followed by a wave of retaliatory strikes by Iran against the Gulf countries. The impact of the 2026 war on Italy–Gulf relationships in different domains is analysed in the following paragraphs. The analysis explores the increased focus on security in recent months and the related political consequences.

Machinery, Fossil Fuels, And More

Before the outbreak of the war, Italy–Gulf relations revolved primarily around bilateral trade. Italy was one of the foremost exporting countries towards the region (ranking fourth in global exports to Qatar, seventh to Saudi Arabia, ninth to Kuwait, eleventh to the UAE, and twelfth to Oman and Bahrain in 2025), with sales concentrated especially in the 'general machinery and instruments' sector. In terms of imports, Rome bought natural gas from Qatar, oil from Saudi Arabia and Kuwait, and metal products from the UAE, Bahrain, and Oman.[6] Trade exchange was thus centred on the Italian export of capital goods (i.e., mechanical instruments and industrial machinery)[7] and manufactured products (especially 'made in Italy' luxury and fashion products)[8] in return for energy supplies and metal products from the Gulf.

The size of trade relationships, however, was not matched in the foreign direct investment (FDI) sector: despite the substantive volume of outward investment overseas by the Gulf Cooperation Council (GCC) countries, investment flows between the Gulf and Italy have been very low in recent years. As far as stocks are concerned, Italy's outward FDI stock remains sizeable in the UAE (12.6 billion euros overall) and to a lesser extent Saudi Arabia (4.7 billion euros), while GCC FDI stocks in Italy are negligible (less than 1.6 billion euros for the six GCC countries combined).[9]

Economic relationships have been sustained and advanced through diplomatic endeavours fostered by successive Italian and GCC governments. In the 14 months before the outbreak of the Iran war, several initiatives were concluded at the bilateral level. In February 2025, for instance, Rome and Abu Dhabi signed a bundle of over 40 new agreements, with the UAE committing to investing US$40 billion in Italy across different sectors. Besides sector-specific initiatives, the official statement also referred to the UAE's effort to reach a free trade agreement (FTA) with the EU and enhance "its presence in European markets with Italy's support."[10]

In parallel, in January 2025, the Italy–Saudi relationship was elevated to a strategic partnership and a number of bilateral memoranda of understanding (MoUs) were signed.[11] Finally, in early 2026, representatives of the Italian and Qatari governments inaugurated a large development

project worth US$2.7 billion at the Misrata port, in Libya, implemented by MSC and Al Maha Qatari Company—an initiative that highlights how Italy–Gulf economic cooperation can potentially extend to other areas of the 'Enlarged Mediterranean'.[12] Indeed, from the Italian perspective, Gulf countries have been increasingly considered key not just for bilateral trade, but also as partners in the Southern neighbourhood: be it as potential co-investors in the African countries targeted by the Italian continent-wide initiative 'Mattei Plan',[13] or as indispensable nodes in ambitious connectivity projects like the India-Middle East-Europe Economic Corridor (IMEC).[14]

Inevitably, the outbreak of the war in the Gulf at the end of February 2026 impacted this picture. While the diversification of energy providers pursued by Rome since 2022, partly mitigated the fallout of the Strait of Hormuz blockade on energy supply (but not on energy prices and thus inflation), Italian trade towards the region was heavily hit. Indeed, according to industry estimates, in March 2026, Italian exports to the Gulf were 63-percent lower year-on-year, leading the Italian government to introduce a dedicated support programme for companies operating in war-affected markets. Overall, as of June 2026, 1.6 billion euros in Italian export was estimated to have been lost due to the conflict.[15]

At the same time, military cooperation between Italy and GCC countries has been further strengthened as an immediate consequence of the war, with implications both at the domestic level and for the future trajectory of the relationship.

From Arms Trade to Military Support

Arms trade has been an important, yet politically contentious area of exchange between Italy and the Gulf countries since the early 2000s.[16] In 2016, for instance, the centre-left Renzi government struck a deal with Riyadh for the supply of almost 20·000 aerial bombs worth more than 400 million euros.[17] Three years later, however, an 18-month ban on missile and air bomb transfers towards Saudi Arabia and the UAE was introduced in response to the two countries' involvement in the war in Yemen.[18] This ban was first made permanent in 2021 and eventually lifted in 2023.[19]

Nonetheless, Italian arms exports to the Gulf continued in the meanwhile, despite the temporary ban on Saudi Arabia and the UAE. According to data from Stockholm International Peace Research Institute (SIPRI), in the period 2021–2025, Italy became the second-largest supplier of arms to the Middle East, after the US, and ahead of France and Germany. In the Gulf region, the top destinations were Qatar (the recipient of more than one-fourth of Rome's global arms exports, buying six combat aircraft and five warships) and Kuwait (17 percent of Italy's arms exports, including 23 combat aircraft).[20] Furthermore, Italian military personnel and assets were deployed in Kuwait (at Al Salem airport) and in Qatar (at the Al-Udeid airbase) with the aim of "meet[ing] the needs stemming from the missions in the Middle East and Asia."[21] In a nutshell, on the eve of the Iran war, Italy already stood out as a key military partner for the Gulf countries.

In early March, following the first Iranian attacks against neighbouring Gulf countries, Rome received requests for military assistance, especially anti-drone systems and the Franco-Italian SAMP/T ground-to-air defence system, which Italy was already providing to Ukraine.[22] On 5 March, Prime Minister Meloni confirmed that Italy would provide "air defence aid" to Gulf countries, "not only because they are friendly nations but also because there are tens of thousands of Italians in that area and approximately two thousand Italian soldiers we must protect. It is also vital for energy supplies."[23] The same day, Minister of Defence Guido Crosetto announced Italy's redeployment of 239 personnel (out of 321) from Kuwait and seven (out of 10) from Qatar to Saudi Arabia, as a way to "ease the burden" in the region; at the same time, he announced the idea of deploying "a multidomain device" in the Middle East to contribute to achieving "regional stability".[24] Meloni's and Crosetto's words signalled an implicit shift from discrete country deployments to a more comprehensive, region-wide approach (now also encompassing Saudi Arabia) in Italy's military presence in the Gulf region.

Later in March, two dedicated task forces were launched to assist Saudi Arabia, the UAE, Kuwait, and Bahrain in their defence: the so-called Task Force Air Arabia. This included, among others, around 400 personnel units, as well as four Eurofighter F-2000A aircraft, a multi-sensor E-550A CAEW aircraft, an air-defence radar AN-TPS-77, and an anti-drone ACUS-E system.[25] The Task Force Land Cerbero was made up of around 260 personnel, including a task force equipped with the SAMP-T in Saudi Arabia, a Skynex anti-drone system in the UAE, and a Kronos radar system in Bahrain.[26] In late July, this deployment, which had been largely unnoticed in the previous months, became the object of a heated political row in Italy, with the opposition questioning the operational scope of the mission. The government was criticised for its alleged lack of transparency, especially with regard to the decision to expand the Italian deployment in the region to Saudi Arabia too. Questions about Italy possibly getting embroiled in the conflict were voiced, leveraging widespread concerns about and opposition to the war in the country's public opinion.[27]

In a nutshell, the war in Iran raised the profile of Italy–Gulf military cooperation, which expanded from arms transfers to operational assistance on the ground in conflict-stricken theatres, signalling a process of security entanglement subject to increased scrutiny at the domestic level.

Looking Ahead: Towards Security Entanglement?

Amidst the regional crisis triggered by the war in Iran, Italy–GCC relations are at a crucial crossroads. The enhanced economic and military ties developed in previous years have arguably led to a security-focused reorientation of the relationship since February 2026. Soon after the outbreak of the war, Italy quickly provided support on the ground, in an effort to both assist partner countries in the 'Enlarged Mediterranean' and to protect primary export markets and supply chains for the Italian economy.

At the same time, however, also due to the lack of a clear and distinctive political vision and positioning on regional matters, Italy has

not been able to play an agenda-setting role at the diplomatic level, acting mainly as a venue for negotiations. True, in the run-up to the war, Rome repeatedly tried to host talks between Iran and the US on the nuclear issue, for instance in the spring of 2025. Enhanced engagement between the Meloni government and regional leaders has also been visible ahead of and during the crisis, with Rome hosting talks between Israeli and Lebanese delegations to consolidate the ceasefire.[28]

Yet, caught between a domestic public opinion highly critical of the actions of the Netanyahu and Trump administrations in the region, and its international and political allegiances,[29] the Italian government has maintained a very low profile on the two fundamental questions that are inescapable for achieving regional stability: the Palestinian issue and the Iranian nuclear dossier.

To truly contribute to stability, peace and prosperity in the Gulf and the 'Enlarged Mediterranean' more broadly, Italy cannot confine itself to providing military support to its partners; it must also develop a distinctive profile for itself as a trusted external actor, capable of contributing proactively to identifying platforms for dialogue and developing solutions around the thorniest regional issues. Security support disconnected from diplomatic effort and political vision is likely to lead not to greater security, but simply to greater security entanglement, resulting overall in a more constrained, rather than influential, role for Italy in the 'Enlarged Mediterranean'.

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This article was written by the author based on his own research. Generative AI tools (ChatGPT 5.6) were conversationally used to gather feedback on the first draft prior to submission.

7

Not Our War, But Our Interests: Britain and Gulf Security

Neil Quilliam

On 1 March 2026, then British Prime Minister Keir Starmer said in Parliament, "We were not involved in the initial strikes on Iran, and we will not join offensive action now."[1] By refusing to join Israeli and US military operations against Iran while committing Britain to the defence of Gulf partners, Starmer demonstrated that for the United Kingdom (UK), supporting regional allies took precedence over following Washington into a conflict.

Britain's willingness to provide military support to its Gulf partners has renewed the debate about the UK's role in regional security. Some critics noted that its contribution was delayed compared to other partners and that Gulf Arab states had already activated much of their own air and missile defence capabilities.[a] Others regarded it as a modest contribution that did little to alter the broader balance of power. Those who viewed the move favourably noted that British deployment arrived at a time when the Gulf Cooperation Council (GCC) governments were seeking visible demonstrations of commitment from external partners. Thus, the use of British military facilities for defensive operations, coupled with the deployment of additional Royal Air Force (RAF) assets to the Gulf, was seen as evidence of a renewed British commitment to regional security. However, none of these interpretations fully captures the significance of Britain's actions.

Britain's Military Contribution

The UK already maintains a significant military presence in the Gulf and its wider environs. RAF Akrotiri in Cyprus serves as Britain's principal air hub for operations in the Middle East.[2] The UK's operational air headquarters for the region

a The comments were made in a closed-door roundtable discussion at Chatham House, London, held under the Chatham House Rule.

is located at Al Udeid Air Base in Qatar, while British forces also operate from facilities in the United Arab Emirates (UAE) and Oman. The UK Naval Support Facility in Bahrain supports a permanent Royal Navy presence in the Gulf.[3] Collectively, these facilities provide the UK with a network of bases and access arrangements that makes its military reach unmatched among European states.

The deployment of four additional RAF Typhoon fighter aircraft to Qatar,[4] as well as Voyager air-to-air refuelling support[5] and Britain's willingness to participate in defensive operations, was not simply a symbolic gesture. Operating from Qatar, the aircraft were intended to not only strengthen the RAF's existing presence in the Gulf but also support Bahraini and Emirati air-defence requirements.[6] These deployments underscored the UK's ability to make a credible military contribution while reassuring Gulf partners that London remained committed to their security. The move also highlighted the advantages of Britain's established military presence in the Gulf, allowing it to respond quickly to emerging threats and support partners without the need for a large-scale military build-up.

However, while Britain's response demonstrated that it was prepared to offer tangible support to its Gulf partners, it did not signal an expansion of its regional ambitions. Instead, it reinforced London's role as a primarily reactive security partner, operating alongside allies and helping them manage crises when they emerge.

The significance of Britain's actions becomes clearer when viewed in the context of its Gulf policy over the past decade. Since leaving the European Union (EU), the UK has sought to deepen relations with the GCC states through trade, defence cooperation, investment partnerships, and diplomatic engagement.[7] Security cooperation has remained a central pillar of these relationships, but British policy has generally emphasised deterrence, reassurance, and capacity-building rather than direct military intervention. The support provided during the war represented a continuation of this approach, driven by the understanding that Gulf Arab states would assess external partners by their conduct during a crisis. Providing access to its facilities and deploying its military assets allowed the UK to demonstrate that it remains a reliable and capable security partner. This carried added significance following a period of political volatility in Britain: the succession of three Conservative prime ministers in 2022, followed by a change of government in 2024, had prompted some Gulf leaders to question the country's consistency and long-term focus. Britain's response therefore served not only immediate security objectives but also the longer-term goal of preserving the GCC relationships it has spent decades building, many of which have become increasingly important economic and political partners.

Military Support Vs Political Signalling

Gulf Arab leaders increasingly evaluate external partners by their conduct during crises rather than statements of support. While Britain's military contribution met that standard, its political messaging led to frustration in regional capitals. In April 2026, Starmer told reporters: "[T]his is not our war. We will not be drawn

into the conflict. That is not in our national interest."[8] This drew criticism from Gulf leaders. In conversations held under the Chatham House Rule, interlocutors from Gulf states contrasted Starmer's comment on Iran to his declaration to Ukraine President Zelensky in Kyiv on 16 July: "Your fight is our fight, your security is our security, and the United Kingdom will not waver."[9] Starmer's characterisation of the conflict in Iran as "not our war" left the impression that Gulf security concerns were viewed differently from those of Ukraine.

The episode highlighted an important distinction between military support and political signalling. Britain's actions reassured Gulf partners that London remained willing to contribute to their security. Its rhetoric, however, did not always convey the same degree of solidarity. From London's perspective, this is unlikely to create a lasting credibility gap and remains manageable in the short term. However, Starmer's remarks reinforced the already widespread perception in some Gulf capitals that the UK is a diminishing power. In that sense, the issue is less about immediate damage to bilateral relations and more about Britain's gradual loss of influence and standing in the region.

Another factor driving the UK's response was the desire to demonstrate continued relevance at a time when the future of US military engagement in the Middle East is under scrutiny. For several years, policymakers in the region have debated whether the US intends to devote greater attention and resources to its competition with China in the Indo-Pacific. While Washington remains the dominant military power in the Gulf, uncertainty surrounding the long-term direction of US policy has encouraged regional states to cultivate a wider range of security partnerships. Britain's response allowed it to reinforce its credibility as a security partner, demonstrating that European powers can still play a meaningful role in Gulf security. At a time of changing US priorities, this message was likely as important as the military contribution itself.

Furthermore, Britain's position in the Gulf differs from that of other European partners. It combines a permanent naval presence in Bahrain, extensive air and logistics infrastructure, longstanding defence agreements, and regular operational engagement with the GCC partners. Among European powers, only France has a comparable security footprint, maintaining a permanent military presence in the UAE and acting as an important security actor. Other countries such as Germany and Italy participate selectively through maritime missions, military cooperation, and periodic deployments.[10] This gives Britain a level of access, familiarity and military interoperability that few other European states can match, even if its capabilities remain considerably smaller than those of the US.

Nevertheless, it is important not to exaggerate the scale of Britain's commitment. The UK remains an important military power with significant regional access and capable armed forces, but its resources are finite. Its defence budget, force structure, and deployable capabilities are considerably smaller than those of the US. While the Royal Navy maintains a permanent presence in the Gulf and the RAF can make meaningful contributions to regional operations, Britain

lacks the capacity to serve as a major guarantor of Gulf security. Its influence derives instead from its ability to operate alongside the US, coordinate with European and regional partners, and provide military capabilities that strengthen broader collective security arrangements.

Domestic economic pressures, competing security priorities in Europe, and commitments to NATO will continue to constrain British military ambitions. Moreover, London is not seeking to expand its military role in the Gulf. What the 2026 war has revealed is simply a willingness to employ existing capabilities more visibly and directly when regional stability is threatened.

Britain and the Future of Gulf Security

The significance of Britain's response to the 2026 Iran war extends beyond the conflict. Britain's willingness to support Gulf partners is not simply a reaction to a regional crisis but the product of a broader policy that successive governments have pursued for more than a decade: treating the Gulf as an increasingly important region for British security, prosperity, and international influence.

While successive governments have adopted different approaches, the overall direction of policy has remained consistent. David Cameron's Gulf Initiative sought to deepen political, security, and economic ties with the GCC states, while Theresa May developed that engagement through mechanisms such as the UK-GCC Joint Working Group. Similarly, in December 2016, the then Foreign Secretary Boris Johnson proclaimed in Manama that "Britain is back East of Suez", capturing the ambition to restore a more visible British presence in the region.

The Gulf's importance to the UK cannot be understood solely through the lens of security. Successive governments have viewed the region as a critical source of investment, trade, and economic opportunity. The appointment of Simon Penney as the first HM Trade Commissioner for the Middle East in May 2018 signalled that commercial engagement had become a strategic priority alongside defence cooperation. Penney brought extensive Gulf banking experience to the role, having previously served as Middle East and Africa CEO at RBS and Head of Wholesale and International Banking at First Gulf Bank.[11] Following the UK's formal departure from the EU in 2020, the Gulf assumed significantly greater importance as policymakers sought to expand trade, attract investment, and strengthen partnerships beyond Europe.[12]

The conclusion of negotiations on the UK-GCC Free Trade Agreement in May 2026 further institutionalised Britain's relationship with the GCC states and confirmed the Gulf's growing importance to its trade and investment strategy. The first, and so far, only, Free Trade Agreement (FTA) between the GCC and a Group of Seven (G7) economy was signed with the UK in May 2026. The FTA removes tariffs on approximately 93 percent of UK exports to the Gulf, eliminating an estimated £580 million in annual duties, with £360 million removed immediately upon taking effect. It also introduces new protections for UK services, investment, and digital trade. The deal is projected to add £3.7 billion annually to the UK economy in the long term and increase real wages by £1.9 billion a year.[13]

Security and economics are therefore best understood as complementary elements of Britain's Gulf policy. Its military presence provides reassurance to Gulf partners and contributes to regional stability. Stability, in turn, supports commercial relationships, investment flows, and energy markets, which are increasingly important to the British economy. Gulf sovereign wealth funds remain significant investors in the UK, while British businesses maintain a strong presence in sectors ranging from financial services and infrastructure to defence, education and energy.[14]

Britain's Gulf strategy is therefore neither an attempt to recreate its erstwhile dominance nor simply a series of improvised responses to regional crises. It is a deliberate effort to preserve influence through a combination of military access, diplomatic engagement, and economic integration. While financial constraints, commitments in Europe, and reliance on US military leadership will prevent the UK from becoming a principal guarantor of Gulf security, its established presence, operational familiarity, and willingness to act will continue to distinguish it from most European partners.

The more consequential question is whether British security can be separated from Gulf security at all. The UK's prosperity is increasingly connected to Gulf trade, investment, and energy markets, as well as to the security of the maritime routes linking the region to Europe and Asia. Viewed through this lens, Britain's actions in 2026 were not simply an act of solidarity with regional partners; they were also a defence of British economic and strategic interests. The war demonstrated that London remains relevant in the Gulf. Its challenge now is to convert episodic reliability in moments of crisis into sustained political influence.

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The author acknowledges the use of ChatGPT 5.6 to conduct a preliminary literature survey and to check for repetition of ideas.

8

Broker, Not Guarantor: Russia and the Gulf After the Iran War

Nikolay Kozhanov

When Iran launched missile strikes on Gulf Cooperation Council (GCC) infrastructure on 28 February 2026, Russia's oil and petroleum export revenues were at US$9.75 billion. By March, they had nearly doubled to US$19 billion.[1] Moscow had not fired a shot, deployed a soldier, or spent a dollar. Yet, it emerged from the opening month of the war as one of its principal economic beneficiaries, partly due to a United States (US) Treasury authorisation for the sale of Russian crude.[a] The authorisation, while narrowly framed, reduced uncertainty for specified cargoes during the supply emergency.[2] This article highlights the paradox of this windfall: the same conflict that fattened Russia's energy revenues exposed, equally, the limits of its standing as a Gulf partner at a moment that mattered.

The 2026 Iran–US/Israel confrontation indicates a turning point in GCC member states' relations with Russia, not through any immediate rupture in economic or political dialogue but through a subtle and perhaps more durable shift in how Gulf capitals assess Moscow's strategic worth. The Kremlin's actions during the first months of the conflict raised serious doubts about Russia's capacity to act as a balanced power capable of converting its access to all sides of the conflict into influence. Criticism of Moscow became more explicit within Gulf policy circles,[3] with regional analysts questioning Russia's reliability as a partner whose reported military and intelligence support for Iran was incompatible with its declared commitment to Gulf security.[4]

a Washington temporarily relaxed constraints on transactions involving Russian crude during the first months of disruption caused by the 2026 conflict, issuing a series of OFAC general licences that facilitated the delivery and sale of Russian-origin oil already at sea. However, the last of these emergency authorisations, General License 134C, expired on 17 June 2026.

The central issue is that the Kremlin remains largely untroubled by these signals. While the existing foundations of the Russia–GCC dialogue can absorb its unwillingness to support the Gulf states when it counted most, Russia's posture may only be partly justified.

Pre-War Foundations

By early 2026, Russia–GCC relations had become broader and more institutionalised than ever before. The Russia–GCC Strategic Dialogue, established in 2011, has evolved into a regular ministerial format. Its sixth meeting in Moscow in July 2023 adopted a Joint Action Plan for 2023–28, covering political consultation, trade, investment, energy, agriculture, food security, education and culture.[5]

However, this institutional density did not amount to strategic alignment. Russia has not replaced the US as the GCC's security provider, nor have Gulf governments endorsed Moscow's confrontation with the West. The relationship rests on functional complementarity. Russia seeks capital, commercial routes, political recognition and coordination with major energy producers, while the GCC states value Russia as a permanent member of the UN Security Council, as an interlocutor with Iran, and as a partner in oil-market management and an element of foreign-policy diversification.

Saudi Arabia has anchored the bilateral relationship through OPEC+ (Organisation of the Petroleum Exporting Countries) and high-level energy coordination. Qatar has combined investment with mediation: during Emir Tamim bin Hamad Al Thani's April 2025 visit to Moscow, both sides agreed to add 1 billion euro each to their joint investment platform.[6] The UAE has developed the most extensive Arab economic relationship with Russia. President Mohamed bin Zayed Al Nahyan's August 2025 visit to Russia produced a Trade in Services and Investment Agreement covering finance, healthcare, transport, logistics and professional services.[7]

However, these models of cooperation contain a structural contradiction, with Russia simultaneously deepening its partnership with Iran. In January 2025, Moscow and Tehran signed a 20-year strategic partnership, and in May 2025, an agreement between Iran and the Russian-led Eurasian Economic Union (EEU) entered into force. The latter significantly lowered barriers to bilateral commerce, establishing preferential or zero tariffs for almost 90 percent of traded goods. The agreement therefore provided an additional institutional foundation for expanding economic ties between Russian and Iran, as well as reducing transaction costs at a time when both countries were seeking to mitigate the effects of Western sanctions.

Furthermore, while the Russian-Iranian partnership lacked an automatic mutual-defence clause, it consolidated defence, military-technical, economic, and political cooperation between two heavily sanctioned states.[8] Since Iran had previously provided assistance to Russia in its war against Ukraine, Moscow predictably built its attitude towards the 2026 conflict based on strong incentives to protect Iran, at least politically.

Strategic Ambiguity During the War

The duality of its relations with the Gulf players shaped Russia's wartime behaviour. Moscow condemned the US–Israeli attacks, maintained close contact with Tehran, and presented the conflict as stemming from Western aggression. It was also reported to have supplied Iran with targeting information on US ships and aircraft. Russia denies sharing such intelligence, and the allegation has not been conclusively established.[9] Nevertheless, the reports strengthened Gulf suspicions that Russia was helping Iran preserve capabilities that threatened GCC territory, infrastructure, and maritime trade.

At the same time, Russia activated its channels with Gulf capitals. On 2 March, President Vladimir Putin spoke with the leaders of Saudi Arabia, the UAE, Qatar and Bahrain, presenting Moscow as an intermediary and offering to relay Emirati complaints to Tehran.[10] Energy coordination with Riyadh too continued. The eight OPEC+ states, including Saudi Arabia, Russia, the UAE, Kuwait and Oman, met on 1 March and agreed on a production adjustment of 206·000 barrels per day.[11]

For the GCC member states, this behaviour was, however, insufficient. The Gulf governments had expected Russia's relationship with Iran to provide some restraining influence, limiting Tehran's aggression against the Arab monarchies. Instead, Moscow appeared capable of explaining Iranian conduct but not changing it. Consequently, the conflict exposed a crucial weakness of Russia as an international player: despite diplomatic access to Tehran, Moscow lacked either the ability or the readiness to deter Iranian attacks.

The comparison with China is revealing. Whereas Moscow's influence rested primarily on political and security ties, Beijing possessed stronger structural economic leverage as Iran's principal oil customer and one of its most important commercial lifelines under sanctions. This prompted Gulf governments to look increasingly to China to use its economic weight to press Tehran over freedom of navigation and regional security.[12] However, Beijing too proved reluctant to convert its potential leverage into sustained coercive pressure, preferring diplomatic engagement and mediation. The wartime experience therefore produced differing limitations in terms of keeping Iran in check: Russia enjoyed access without demonstrable coercive leverage, while China possessed considerable economic leverage but showed little willingness to exercise it decisively.

The GCC response to Russia's balancing act was pragmatic. The monarchies could not confront Russia without endangering energy coordination, investment, and access to Iran and UN cooperation. Moreover, isolating Moscow would risk pushing it closer to Tehran. However, the Gulf states could no longer regard Russia as a reliably balanced actor. The joint GCC–Jordan–Russia ministerial meeting on 30 March captured this tension. GCC foreign ministers met Minister of Foreign Affairs of the Russian Federation Sergei Lavrov to discuss what the GCC officially described as "Iranian aggressions" against its members and Jordan.[13] Russia remained part of the diplomatic process but was asked to respond to a collective Arab accusation against its strategic partner. Moscow's response remained muted.

The UAE's Dilemma

The UAE presents the sharpest test of Russia's Gulf balancing strategy. Its situation constitutes a blend of extensive economic ties with Moscow and high exposure to Iranian attacks during the conflict. Russia–UAE relations encompass trade, finance, aviation, tourism, logistics and investment, and the Emirates hosts a substantial concentration of Russian businesses, capital, and private wealth. This makes the UAE important to Moscow, not only as a political partner but also as a commercial and financial hub connecting Russia to non-Western markets. Given the scale of Russian interests in the Emirates, Moscow has a material incentive to prevent further destabilisation of the UAE and to protect the environment in which Russian assets operate. Yet, there is little indication that this interest translated into Russia creating visible pressure on Tehran to halt attacks against Emirati territory. While Moscow maintained diplomatic contacts and offered intermediation, it did not appear willing to use its relationship with Iran to shield its most important Gulf economic partner.

The explanation lies partly in the asymmetry between Russia's relationships with the UAE and Iran. Abu Dhabi is economically valuable to Moscow, but Russia's partnership with Tehran has acquired broader strategic significance through defence cooperation, geopolitical coordination, and their shared confrontation with Western pressure. For Russia, protecting its economic interests in the UAE does not justify jeopardising relations with Iran. Moreover, Moscow can reasonably expect Abu Dhabi to preserve bilateral economic ties despite political dissatisfaction, since restricting Russian activity would impose costs on Emirati companies and financial institutions as well as affect the UAE's position as an open international business hub.

Thus, the conflict exposed the limits of economic interdependence as a source of security leverage. Russia's clear interest in the UAE's stability did not amount to a security commitment. For Abu Dhabi, the lesson was significant: extensive Russian economic exposure could give the UAE some influence over Moscow's calculations, but it could not compel the Kremlin to restrain Tehran when more important strategic interests were involved. Ultimately, economic depth in the UAE-Russia relationship proved a poor indicator of Moscow's willingness to protect Emirati security.

The UN Security Council Test

Russia's conduct at the UN Security Council reinforced the limits of its solidarity with the GCC. At the first emergency meeting on 28 February 2026, Bahrain sought consideration under "The situation in the Middle East", whereas Russia and China requested the broader agenda item, "Threats to international peace and security".[14] The difference reflected competing narratives: the GCC wanted to foreground Iranian attacks on Arab states, while Moscow sought to frame them within the wider US–Israeli assault on Iran.

On 11 March, Russia and China abstained on Resolution 2817, which condemned Iranian attacks on GCC states and Jordan, allowing its adoption.[15] On 7 April, however, both powers vetoed a Bahrain-sponsored draft resolution encouraging international coordination to protect commercial navigation through Hormuz. Despite the authorisation of force being removed from this draft, Moscow maintained that the text was

biased against Iran and ignored the conflict's broader origins.[16]

For the GCC, Hormuz was not an abstract legal issue but a vital artery for energy exports, imports, food supplies, and economic stability. Russia's veto could therefore be interpreted in Gulf policy circles as a deliberate decision by a permanent UN Security Council member to limit international pressure on Iran at a time when Iranian actions were threatening core Gulf security interests. GCC Secretary-General Jasem Albudaiwi condemned the Security Council's failure to adopt the resolution, arguing that it encouraged further Iranian attacks on navigation and undermined international trade, although he refrained from naming Russia or China directly.[17] This restrained official language preserved room for continued engagement with Moscow, but the dissatisfaction expressed by the GCC leadership with the outcome of the vote was unmistakable.

Broker, Not Guarantor

The conflict exposed the difference between a broker and a guarantor. Russia can act as a broker because it maintains relations with antagonistic parties and preserves deliberate ambiguity. Strategic weight, however, requires the ability to influence behaviour, deliver agreements, and provide credible benefits or costs. Moscow did not prevent Iranian attacks on GCC states, reopen Hormuz, or reconcile its political defence of Tehran with Gulf demands for maritime security. Moreover, it lacked a credible security proposition for the GCC.

Consequently, Gulf states sought to strengthen their defence capabilities through cooperation with Ukraine, despite its ongoing war with Russia – drawing on Kyiv's wartime experience and defence technologies. This demonstrated the pragmatic limits of the GCC's security relationship with Moscow: when immediate defence requirements were at stake, cooperation with Russia did not preclude engagement with its principal military adversary. Moscow's concept of inclusive Gulf security may remain relevant to a future diplomatic architecture, but it did not answer the immediate challenge of protecting ports, vessels, airports, desalination facilities, and energy infrastructure. The US remains indispensable in this context, as it provides air defence, intelligence, naval capabilities, and deterrence—assets that Russia was neither willing nor able to supply to the Gulf during this crisis.

The blowback for Moscow is expected to be largely reputational, with the GCC states unlikely to undertake an anti-Russian turn. Russia will remain important in energy coordination, retain extensive bilateral ties, and continue to serve as a channel to Tehran. Nevertheless, the Gulf will increasingly treat Russia as a useful but bounded partner rather than a reliable balancing power. The conflict has increased Moscow's economic and diplomatic relevance, but its support for Iran, reported intelligence assistance, and veto on Hormuz has created a lasting trust deficit. While Russia remains too important to exclude, it is not an actor on which the Gulf monarchies can rely at a critical moment of regional insecurity.

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The author acknowledges the use of ChatGPT 5.6 Sol for language refinement prior to submission.

Endnotes

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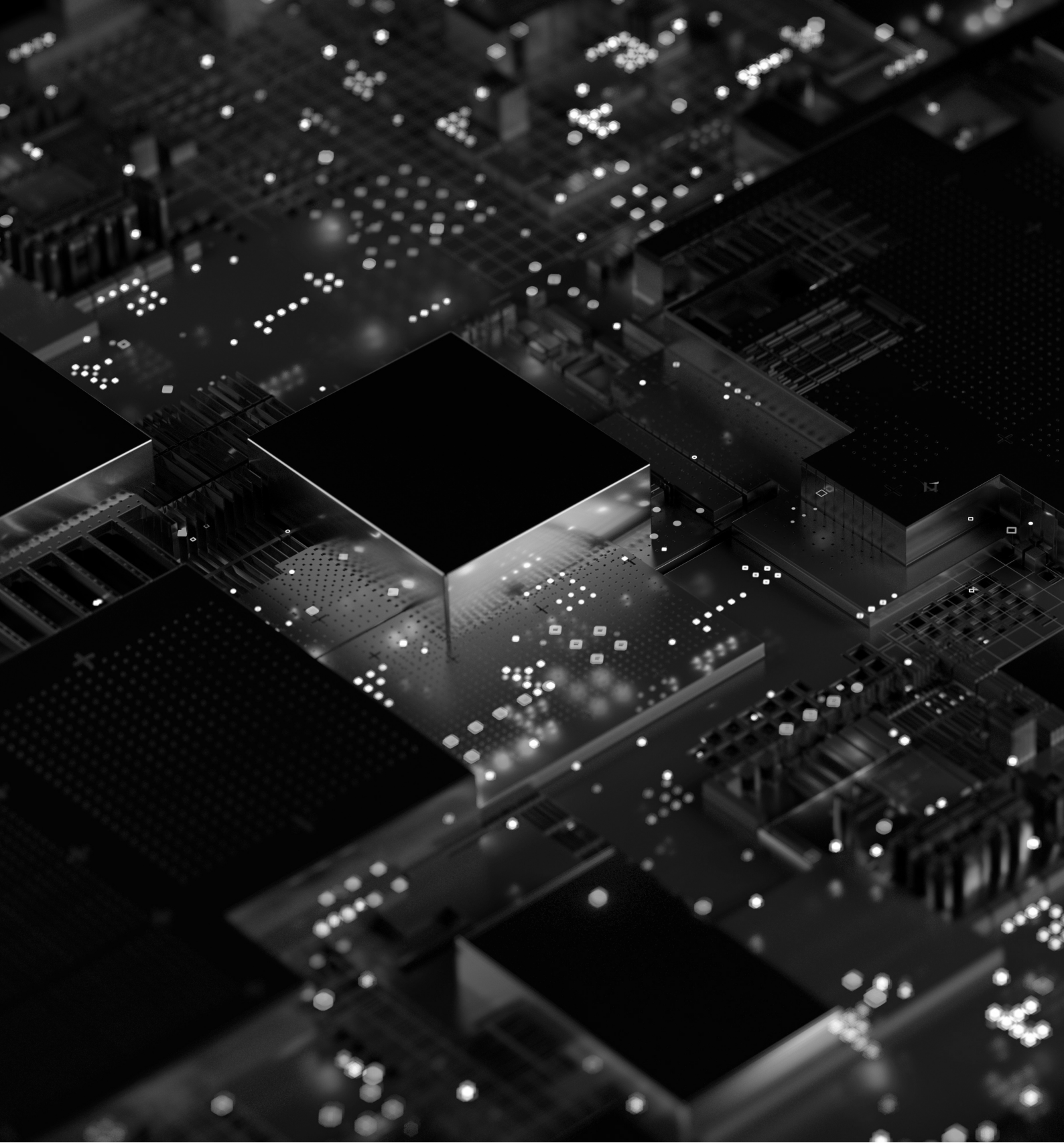
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