



By: Zaki Laïdi

The Gulf states should not remain hostages to external strategies and decisions



No one knows whether the ceasefire between the United States and Iran will pave the way for a diplomatic settlement to end the war.

But two things are already clear: America's strategic credibility has been dealt a severe blow, and the Gulf states have ended up in an exceptionally unenviable position.

The Gulf states are, for the most part, **strategic hedgers**. Despite their acute vulnerability, rooted not least in their geography, they have not secured formal security guarantees from an external power. Instead, they emphasize accommodation, attempting to strike a balance between protectors (especially the US) and threateners (such as Iran).

But this does not diminish the importance of the informal US security guarantee, which has been essential to the Gulf states since the 1979 Iranian Revolution.

These countries know that the **US guarantee** is not free, so they have sought to ensure that their well-being is in America's interest by hosting US military bases and propping up the petrodollar system.

Over the last 15 years, however, the Gulf states' faith in American protection has weakened, beginning when US President Barack Obama's administration implicitly supported the 2011 Arab Spring uprisings, and ultimately backed NATO-led military action against Libyan dictator Muammar el-Qaddafi.

This alarmed the Gulf states, which feared being caught up in the upheaval. Only Qatar saw these events as an opportunity, and moved to strengthen the regional influence of the Muslim Brotherhood, which Saudi Arabia and the United Arab Emirates regard as a terrorist group.

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The 2015 Joint Comprehensive Plan of Action compounded the Gulf states' fears.

While the deal promised to limit Iran's nuclear program, Iran's neighbors worried that the JCPOA's terms were too narrow, enabling the country to use sanctions relief to channel more funding toward ballistic missiles and regional proxies.

Obama embraced it anyway—an obvious sign of these countries' lack of influence in Washington.

Add to that America's declining dependence on imported oil, and the underpinnings of the Gulf's relationship with the US appeared to be cracking.

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Enter Donald Trump. By **withdrawing the US from the JCPOA** in 2018, he gave the Gulf states hope that their ties to the US could be renewed.

To support this outcome, Bahrain and the UAE signed the Abraham Accords, which paved the way for normalization of diplomatic relations with Israel.

Nonetheless, when Iranian drones attacked oil-processing facilities operated by Saudi Aramco, Saudi Arabia's state-owned oil company, in 2019, the US did nothing.

This trend continued under Trump's successor, Joe Biden: the US refrained from getting involved after Iranian proxies carried out an attack on the UAE in 2022.

US guarantees

The Gulf states did not give up on US guarantees. Since Trump's return to the White House last year, they have flattered him, pledged to invest huge sums in the US, and struck lucrative deals with his cronies.

Even as they sought to arm themselves, they focused on purchasing American weapons.

But this spending has not produced the desired results. Though Saudi Arabia is now the world's **sixth-largest arms importer**, it ranks **25th in firepower**. The UAE ranks 24th in defense spending, but **54th in firepower**.

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And the US not only started a regional war without consulting the Gulf states; it allowed them to bear the brunt of Iran's retaliation.

Moreover, it is now painfully clear that, far from making the Gulf states more secure, Trump's withdrawal from the JCPOA spurred Iran to renew its uranium-enrichment activities.

Today, Iran has a **significant stock** of uranium enriched to 60%—near weapons-grade. Iran has also expanded its missile program and invested heavily in its proxy militias, which are working to destabilize Lebanon, Syria, and Yemen.

More hedging

So far, the Gulf states have responded to their deteriorating security situation with more hedging.

After Russia's full-scale invasion of Ukraine in 2022, the Gulf states sought to make themselves indispensable to both Russians and Ukrainians, as well as to the West more broadly.

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It also considered signing the **Abraham Accords**, until the Gaza war forced it to change its position: now, its recognition of Israel is conditional on the establishment of a Palestinian state.

The UAE, by contrast, upheld the Abraham Accords and continued to expand military, security, and economic cooperation with Israel.

The Gulf states must take their security into their own hands

All this hedging has done the Gulf states little good. It certainly will not protect them if the US decides to claim victory, withdraw from the region, and leave them alone to face a more assertive Iran. It is telling that neither the 15-point US plan nor Iran's ten-point plan for ending the war grants the Gulf states any meaningful role.

And this is to say nothing of Israel's continued attacks on Lebanon, which are threatening to end the ceasefire practically before it begins.



The Gulf states must take their security into their own hands, establishing a system of collective security

Rather than remain hostages of external strategies and decisions, the Gulf states must take their security into their own hands, establishing a system of collective security that respects the territorial integrity of all

countries in the region and renounces externally imposed regime change.

The first step is to adopt a unified stance on the Iran war, which includes calls for the reopening of the Strait of Hormuz, the negotiation of a peace agreement between Israel and Lebanon, and a return to talks over Iran's nuclear program (recognizing that the JCPOA was working before Trump withdrew from it).

All this must be backed by a United Nations Security Council resolution, which ensures a firm commitment by all its permanent members to ensure implementation.

Forging such a unified approach in the Gulf will not be easy.

Qatar and Oman appear to favor a line of reasonable accommodation with Iran.

The UAE had positioned itself on the side of the US and Israel, though depending on the deal the Trump administration makes with Iran, this could become untenable.

Saudi Arabia lands somewhere in the middle, deeply hostile toward Iran but dissatisfied with American and Israeli choices.

But faced with a fragile peace, a furious Iran, and an unreliable US, the Gulf states have no better options.

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