



The Limits of Neutrality for Gulf States in the U.S.–Israel–Iran War

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The skyline of the Doha West Bay business district is seen from the Corniche waterfront promenade, featuring modern skyscrapers and illuminated buildings in Doha, Qatar, on March 2, 2026. (Photo by Noushad Thekkayil / NurPhoto via AFP)

The joint strikes by the United States (U.S.) and Israel on Iran that killed Iranian Supreme Leader Ayatollah Ali Khamenei triggered a war that has expanded to include much of the Gulf region.¹ Despite several Gulf states stating that their territory could not be used for the war by the U.S. or Israel, Iran has targeted U.S. military assets across the Gulf Cooperation Council (GCC) states, with an impact on civilian infrastructure.² Gulf air defenses have intercepted missiles and drones in near-daily incidents, placing Gulf governments under increasing pressure to respond while avoiding direct involvement in the conflict.³

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Amid escalating Iranian pressure on Gulf states, the region finds itself facing a highly complex security environment that no longer fits a clear distinction between war and peace. On the one hand, Gulf states seek to avoid direct involvement in an open confrontation, not only to protect their economic and developmental achievements but also to prevent the destruction of their relations with major global and regional powers. On the other hand, they cannot ignore the fact that their national security and critical infrastructure—particularly energy, maritime navigation, and communications—have effectively become theaters for maneuvering between great powers and regional actors. Thus, what was historically perceived as neutrality has become increasingly exposed within an increasingly interconnected conflict, where Gulf states become part of strategic signaling between adversaries before potentially becoming an actual battlefield.

This policy note argues that the escalation between the United States and Iran has exposed the limits of traditional Gulf neutrality. In this context, Gulf states must balance between deterrence and diplomatic efforts to protect their sovereignty and infrastructure and avoid being drawn into a wider confrontation.

A Fundamental Shift in Middle Eastern Wars

The current reality in the Middle East does not merely reflect a resurgence of old conflicts; rather, it indicates a fundamental shift in how conflicts in the region are fought. Conflicts are no longer confined to clear fronts with fixed battle lines. Instead, they increasingly spill into energy infrastructure, maritime routes, and economic pressure. In this context, neutrality is no longer measured by official statements or diplomatic declarations, but also by the operational environment, such as military infrastructure and security partnerships. The presence of Western military bases, alongside logistical and intelligence networks tied to regional security alliances,⁴ makes the Gulf states—in Iranian calculations—an inherent part of the landscape, even if they do not directly participate in military operations. The U.S. alone maintains a network of bases, naval facilities, and forward operating sites across at least 19 locations in the Middle East, with eight permanent bases in the region, including in Bahrain, Kuwait, Qatar, Saudi Arabia, and the United Arab Emirates.⁵ As a result, political neutrality inevitably clashes on the ground with the reality of logistical and technical involvement.

Expanding the Theater of Deterrence: The Logic of Iranian Strategy

From the Iranian strategic perspective, widening the range of targets used for deterrence is viewed as both a tactical and political necessity. The objective is not limited to its direct adversaries but extends to their allies and partners as well. Targeting Gulf states, despite their declared neutrality, serves two purposes. The first is directed at the United States, signaling that the security of its regional partners is not immune to the fallout of escalation, and that any war in the region will translate into severe economic and security costs for the external powers involved. The second message is directed at the Gulf states themselves, warning that the cost of hosting Western military and logistical infrastructure will inevitably rise in times of war,⁶ and that the presence of such facilities is considered, in Iranian calculations, as implicit participation in the confrontation.

By this logic, political neutrality transforms into what can be described as “incomplete neutrality” in military calculations. A state may declare total neutrality, yet it practically remains vulnerable to leverage and targeting. Targeting becomes a pressure tool aimed at reshaping the behavior of the adversary’s regional environment, pushing Gulf states to reconsider their alliance choices, or at least to restrict their role in supporting international coalitions.

Open War or Calculated Deterrence

This situation presents the Gulf states with two highly contentious alternatives. The first is direct military involvement in the war, which entails unpredictable escalation risks, including costs, and the diversion of developmental resources into war efforts, with long-term impacts on their economic and social models. The second is to confine their response to calculated defensive responses while establishing a deterrence equation capable of preventing, or at least minimizing, the recurrence and scale of such targeting.

History offers a compelling example in this regard: When Saddam Hussein invaded Kuwait in 1990, he attempted to drag Israel into the confrontation by launching “Scud” missiles at its territory.⁷ However, Israel chose not to enter the battle directly, keeping the confrontation strictly within the framework of the US-led international coalition. That decision was a strategic one: absorbing the provocation to avoid expanding the conflict theater in a way that would ultimately serve the adversary. This experience does not advocate for surrender or hesitation in defending sovereignty; rather, it illustrates that retaliation does not always require full involvement and escalating into an open confrontation. Sometimes, the most effective deterrence lies in preventing the adversary from achieving its goal of expanding the theater of war, thereby sparing the region a multi-front war that exceeds any party’s capacity to control the situation.

The Risks of a Prolonged War of Attrition with Iran

Being drawn into a prolonged war of attrition with Iran recalls the Iran-Iraq War of the 1980s, which resulted in hundreds of thousands of casualties and inflicted severe economic and infrastructure damage on both countries over the course of eight years, leaving behind immense losses from which the involved nations took decades to recover.⁸ Today, the cost of such a scenario would be significantly magnified given the Gulf economy’s deep integration with global markets and its dependence on the stability of maritime routes.⁹ In this context, wars are not measured by initial tactical victories but by their long-term costs, including their impact on future generations, lost developmental opportunities, and the erosion of financial reserves that should be invested in education, healthcare, infrastructure, and economic transformation, rather than consumed by the war effort.

Furthermore, the gamble that airstrikes alone can change the regime in Iran remains a narrow and unrealistic bet. Recent experiences—from Afghanistan to Iraq, Libya, and Syria—illustrate the limits of aerial bombardment in toppling a firmly established political regime.¹⁰ It requires a long-term ground presence, enormous political and military costs, and a level of commitment that history shows even major powers have been unwilling to sustain. Airstrikes may degrade capabilities and inflict heavy damage on military infrastructure, but they rarely translate into a definitive political resolution in conflicts with deep structural roots. Consequently, any broad aerial escalation risks prolonging the confrontation without yielding a clear strategic outcome, dragging the region into an endless cycle of escalation.

Sovereignty, Deterrence, and Long-Term Strategic Thinking

Nevertheless, repelling any aggression remains an unequivocal sovereign duty. Protecting airspace, critical facilities, vital infrastructure, and economic assets is a fundamental priority for any state — as is protecting civilians. However, strategic thinking recognizes that military deterrence alone is insufficient; it must be coupled with political, economic, and diplomatic deterrence. The delicate balance lies in preventing a defensive response from opening the door to a broader regional war. Once a war expands, it is difficult to contain. It will not remain confined to reciprocal strikes on military targets; it will engulf the economy, shipping, and energy sectors, forcing a massive reallocation of public budgets away from education and healthcare toward exhausting military spending. The burden will ultimately be borne by civilians.

A Regional Interest in Iran's Stability

From another angle, the dismantling or collapse of Iran as a state does not serve the interests of the Gulf region, nor of key regional powers. The lessons from recent conflicts are unambiguous: collapse does not mark the end of a conflict, but rather the beginning of a new phase of chaos, the rise of militias, the emergence of security vacuums, and the cross-border spillover of conflicts. In this context, an intact, stable, and secure Iran is seen as a regional interest just as much as an internal one. Geopolitical dismantling would likely produce borderless wars and prolonged instability and opens the door to external interference in the region for years, if not decades, to come.

Pressure Strategies via Energy and Maritime Navigation

Within this framework, targeting Gulf energy sources¹¹ and threatening navigation in the Strait of Hormuz can be understood as part of a broader pressure strategy.¹² Driving up global energy prices and shaking financial markets signals clearly to the international community that the war will not remain geographically confined to the region. It will eventually be felt through energy markets and the global economy. The aim of this strategy is to force major powers to exert political pressure on adversaries, or at least push for a de-escalation, before economic damages become impossible to reverse. However, this approach carries a serious risk of backfiring. Major industrial nations, heavily dependent on Gulf oil and gas, may find themselves compelled to protect their interests more directly, thereby widening the circle of international military involvement rather than shrinking it.

Redefining Regional Security and the “New Neutrality”

The core question today is how regional actors can construct a regional security equation that prevents neutrality from becoming a vulnerability. A new security paradigm is required that acknowledges the compulsory interconnectedness of regional security and manages it through clear deterrence and negotiation frameworks. Neutrality in an era of overlapping wars requires “multi-layered fortification”: defensive (by developing military capabilities), diplomatic (by forging negotiation tracks and security guarantees), and economic (by diversifying revenue streams and building resilience against price or maritime manipulation).

The Decisive Strategic Choice for the Gulf

The Gulf states are facing a highly delicate strategic choice: to become part of an escalation whose trajectory they cannot control, or to manage the threat with a strategic composure that prevents the conflict from spreading. Deterrence is imperative, but being drawn into an uncalculated entrapment is a highly costly policy. Protecting sovereignty is a duty, but safeguarding the future is no less important. In an environment where military messaging is inextricably intertwined with economic pressure, maintaining equilibrium becomes the most effective weapon—the balance between possessing the capability to respond forcefully, and the wisdom to keep the conflict contained in the narrowest possible space, denying adversaries their goal of expanding the battlefield.

Crafting a Secure Future: From Reactions to Proactivity

Ultimately, the Iranian targeting of Gulf states has exposed the fragility of the concept of neutrality when alignments overlap. This moment makes clear that geopolitics is no longer measured by fixed military lines, but by spheres of strategic and economic pressure. It also presents an opportunity to rethink the architecture of regional security and build a comprehensive security framework capable of managing this new era of warfare characterized by undefined borders and unconventional tools. The real battle is not just intercepting missiles and drones; it lies in preventing geography and the economy from becoming instruments of coercion in the hands of external powers. Only long-term strategic thinking rooted in the delicate balance between deterrence and restraint possesses the power to prevent a tense present from confiscating the region's future.

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