

Why Is There No Joint GCC Foreign Policy Toward Iran?

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Is there really a “GCC Foreign Policy” toward Iran?

Since 1981, the Gulf Cooperation Council (GCC) has come through war, occupation, blockade and the Arab uprisings. The US–Israel war on Iran that began on 28 February 2026 was expected to be one more test of that kind, and perhaps the defining one. Nearly six months later, after a ceasefire was reached, patched and finally lost to renewed fighting, it has turned out to be something else. What the war asked of the GCC was the one thing its design was never meant to provide: a single policy toward the state that shapes its security environment more than any other. The first round of fighting lasted forty-two days. Iran fired more than 6,000 missiles and drones at seven Arab countries, most of them its own Gulf neighbours,¹ before a Pakistani-mediated ceasefire took effect on 7–8 April.² Drone attacks launched from Iraq by Iran-aligned groups continued after that. The truce frayed through May, was shored up in mid-June by a memorandum named after Islamabad, and collapsed on 8 July, when Iranian attacks on commercial shipping in the Strait of Hormuz tipped the region back into open war. The fighting was still under way in mid-August, by then in its sixth month. Through all of it the six members

1 Iran and the US: ceasefire and nuclear talks in 2026, House of Commons Library research briefing, <https://commonslibrary.parliament.uk/research-briefings/cbp-10637/>

2 Abid Hussain, “How Pakistan managed to get the US and Iran to a ceasefire,” Al Jazeera, 8 April 2026, <https://www.aljazeera.com/features/2026/4/8/how-pakistan-managed-to-get-the-us-and-iran-to-a-ceasefire>

never spoke with one voice, and they barely worked from the same script. The two most telling Gulf decisions of the whole crisis came in a single August week, and neither ran through the council: Saudi Arabia signed a mutual-defence treaty in Mecca with Turkey and Pakistan, and Oman sat down with Iran, alone, to settle the future of the Strait of Hormuz.

Sources and scope

The evidence for what follows is the public record of what the six GCC governments said and did between 28 February and 17 August 2026: the forty-two days of the war's first round, the ceasefire that followed, its collapse into renewed fighting in July, and the diplomacy of August. It rests on three kinds of material. The first is official statements and readouts carried by state media, among them the Jeddah summit communiqué of 28 April, the UAE's announcement, the same day, of its withdrawal from OPEC, and the readouts of the Mecca defence agreement signed on 7 August. The second is communication addressed to multilateral bodies: Bahrain's condemnation motion, presented on behalf of the GCC states and Jordan at the Inter-Parliamentary Union in Istanbul; Qatar's identical letters to the UN Secretary-General and the Security Council; and the GCC Secretary-General's remarks at the Antalya Diplomacy Forum, together with his condemnations of the August attacks on shipping. The third is on-record interviews and op-eds, including Anwar Gargash's appearance at the Dubai Press Club, Prince Faisal bin Farhan's warnings, and the Omani foreign minister's essay in *The Economist*. The analysis treats these declared positions as its data: what each capital was willing to say about Iran in public, before whom, and in what register. The limit of that choice is obvious. It can document the absence of a common line in the public record; it cannot rule out quiet coordination behind closed doors. What it describes is the policy the GCC was able to state openly, the only policy its own publics, its adversary in Tehran and its partners in Washington could actually see and answer.

The range of Gulf responses

Consider the statements that issued from the various corners of the Gulf. Anwar Gargash, diplomatic adviser to the UAE president, used the Dubai Press Club to call Tehran the “principal strategic threat” to the UAE and the Gulf.³ He rejected what he termed “cheap peace” and set out his conditions for any settlement: restored freedom of navigation through the Strait of Hormuz, guarantees against an Iranian nuclear weapon, and limits on Iran’s missiles and drones. He went further, describing the GCC’s own conduct during the crisis as “weak politically and on the security front”⁴. This was a senior Emirati official conceding, on camera, that his own regional organisation had failed to produce a joint policy toward Iran.

Saudi Foreign Minister Prince Faisal bin Farhan delivered a similar message in a different key. Patience in the Gulf was “not unlimited,” he warned, and partners held “very significant capacities and capabilities” they could bring to bear if Tehran did not “recalculate quickly.”⁵ Bahrain, acting on behalf of the GCC states and Jordan, pressed a condemnation motion at the Inter-Parliamentary Union in Istanbul.⁶ Kuwait, which intercepted hundreds of ballistic missiles and drones during the war, accused Iran and its Iraq-based proxies of continuing to strike after the ceasefire took hold.

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- 3 “Anwar Gargash: Hormuz passage must be guaranteed in any US-Iran deal,” Gulf Business, 2026, <https://gulfbusiness.com/en/2026/uae/anwar-gargash-hormuz-passage-us-iran-deal/>
 - 4 Gareth van Zyl, “Gargash calls for united Gulf stance after Iran attacks Kuwait and Bahrain,” Gulf Business, 2026, <https://gulfbusiness.com/en/2026/gcc/iran-kuwait-bahrain-gargash-gulf-security-stance/>
 - 5 “Saudi FM warns Iran that patience in Gulf not ‘unlimited’ amid attacks,” Al Jazeera, 19 March 2026, <https://www.aljazeera.com/news/2026/3/19/saudi-fm-warns-iran-that-patience-in-gulf-not-unlimited-amid-attacks>
 - 6 Rehab Mohammad, “Bahrain Prepares to Spotlight Iranian Aggression at IPU Assembly in Istanbul,” The Daily Tribune (Bahrain), <https://www.newsofbahrain.com/bahrain/129451.html>

Then the register changes. Qatar sent two identical letters to the UN Secretary-General and the Security Council demanding Iranian compensation for damage to Ras Laffan and other civilian sites;⁷ at the same time, Doha declined to join the Pakistani mediation track and kept presenting itself as a dialogue-first capital. The GCC Secretary-General, Jassem Albudaiwi, speaking at the Antalya Diplomacy Forum on a panel titled “A Middle East Beyond Zero-Sum Politics,” told the audience that the Gulf’s effort “to normalise and have a decent relationship with Iran is not something new,” and that the council sought in Tehran “a true partner” for peace and stability.⁸

Oman went further still. Muscat was the only Gulf capital to absorb no missile strikes, enduring only sporadic drones. It was the only GCC state to call the war itself a “violation of international law.”⁹ Its foreign ministry consistently refused to name Iran as the source of the drone attacks it did sustain, and its chief diplomat, writing in *The Economist*, described Tehran’s retaliation as “probably the only rational option available to the Iranian leadership.”¹⁰ This was the language of understanding Iran, not of confronting it.

None of this is to say the Gulf has never acted as one. Twice it did, and both times are worth examining. When Iraq invaded Kuwait in August 1990, the GCC activated the Peninsula Shield Force it had created in 1984, and its members lined up behind the campaign to reverse the occupation.

7 “Qatar Sends Ninth Identical Letter to UN, UNSC Regarding Iranian Aggression on its Territory,” Qatar Ministry of Foreign Affairs, <https://mofa.gov.qa/en/qatar/latest-articles/latest-news/details/2026/03/19/qatar-sends-ninth-identical-letter-to-un--unsc-regarding-iranian-aggression-on-its-territory>

8 “GCC chief warns of ‘disaster’ for world if Iran war continues, urges dialogue,” TRT World (Albudaiwi at the Antalya Diplomacy Forum), <https://www.trtworld.com/article/f8242f46cfc8>

9 Gregory Aftandilian, “Oman and the Iran War: Neutrality Under Strain,” Arab Center Washington DC (on the Omani FM’s *Economist* essay), <https://arabcenterdc.org/resource/oman-and-the-iran-war-neutrality-under-strain/>

10 Alex MacDonald, “Oman says Iranian attacks on Gulf ‘inevitable’ response to US-Israeli assault,” Middle East Eye, <https://www.middleeasteye.net/news/omani-foreign-minister-says-iranian-attacks-inevitable-response-us-israeli-assault>

But the coordination that liberated Kuwait was organised in Washington and Riyadh, under a UN mandate and inside a coalition of nearly forty states; the GCC supplied troops and basing. A quarter of a century later, during the negotiation of the 2015 nuclear agreement, the Gulf monarchies converged again, this time in shared scepticism. They lobbied the Obama administration in something close to a single voice, and welcomed the maximum-pressure turn after Washington abandoned the deal in 2018. That convergence, too, was propped up from outside. It answered a P5+1 framework the Gulf had not built, it was voiced through Washington, not through the council, and it ran alongside the 2017 blockade of Qatar, which split the bloc more violently than any external adversary ever had. The unity in both episodes was real, but it was borrowed. An outside organiser supplied it: a US-led coalition in 1991, a US-anchored diplomatic process after 2015, a coordinating capacity the council has never produced on its own.

In 2026 none of those external supports was there. The United States was a co-belligerent, in no position to act as the neutral organiser of 1991 or the framework-setter of the nuclear years. The ceasefire was brokered in Islamabad, not in Washington or Riyadh, and that removed the outside patron whose presence had produced Gulf cohesion before. And the threat came unevenly. Iran hit Abu Dhabi and Manama hard, spared Muscat all but a few drones, and left each capital with a different war to read, where Saddam's seizure of Kuwait in 1990 had given all six the same one. Take away the external scaffolding and the shared, undifferentiated threat, and what is left is the council's own machinery, which was never built to produce a single external line. So the accurate description is that it increasingly cannot. The conditions that once gave it a borrowed unity, an outside organiser and a common enemy, are exactly the ones the 2026 war took away.

Six policies, one acronym

These divergences sit on top of structural differences in how each member is positioned between Iran and the United States. The UAE's defensive architecture is, by Gargash's own account, built on advanced Western systems, predominantly American, that intercepted the great majority of more than 2,800 incoming projectiles.¹¹ He openly expects the American role in Gulf security to grow after the war, which cuts against most predictions, and events have since given that expectation some empirical backing.

State	Principal threat	Dependence on the US	Stance on dialogue	Stated position
UAE	Iran, directly	High; air defense built on US systems	Rejected	No "cheap peace"
Saudi Arabia	Iran as strategic rival	Moderate	Conditional	Iran must "recalculate"; Mecca pact with Ankara and Islamabad
Bahrain	Sectarian fragility plus US basing	Very high	Closed	Existential threat
Kuwait	Iraqi territory used by militias	Moderate	Limited	International condemnation
Qatar	Economic exposure (LNG)	Low	Kept open	Mediation; UN compensation claim
Oman	None; no missile strikes	Low	Preferred	Conciliatory; sole bilateral channel with Tehran on Hormuz

Each of these positions is rational on its own terms. Together, they cannot be reconciled into a single Gulf line.

¹¹ Laraib Anwer and Meher Dhanjal, "Yes, the UAE won!: President's advisor details how nation dealt with Iranian aggression," Khaleej Times, <https://www.khaleejtimes.com/uae/uae-president-advisor-gargash-iran-attacks>

A second piece of evidence arrived on 28 April, twenty days into the ceasefire. The UAE announced its withdrawal from OPEC and OPEC+, effective 1 May. Energy Minister Suhail Al Mazrouei called the decision a “policy-driven evolution aligned with long-term market fundamentals” and confirmed that no other member, Saudi Arabia included, had been consulted in advance.¹² Abu Dhabi had belonged to OPEC since 1967, before the federation itself existed; nearly six decades of membership ended with a statement carried by state media.

The timing was deliberate. Strikes on shipping had already cut UAE output by more than forty per cent in March, to under two million barrels a day against a sustainable capacity of roughly 4.85 million. The war exposed two costs at once: operating under collective quota discipline while the chokepoint stayed open, and sharing that chokepoint with the state firing into it. The exit looks like a delayed application of the lesson Gargash had offered at the Dubai Press Club. The instruments built to coordinate Gulf producers, like those built to coordinate Gulf foreign policy, no longer match the threats Abu Dhabi believes it faces or deliver the autonomy it believes it needs.

An institution absent from its own crisis

The deeper problem was that the GCC, as an institution, was barely present. It convened once. On 28 April, fifty-nine days after the war began and twenty days after the ceasefire, the council held what its members called an “exceptional consultative summit” in Jeddah, chaired by Saudi Crown Prince Mohammed bin Salman.¹³ It was the first in-person meeting of

¹² “UAE leaves OPEC in blow to oil cartel during war on Iran,” Al Jazeera, 28 April 2026, <https://www.aljazeera.com/news/2026/4/28/uae-leaves-opec-and-opec>

¹³ “MBS chairs GCC Consultative Summit, regional and international developments discussed,” Al Arabiya, 28 April 2026, <https://english.alarabiya.net/News/gulf/2026/04/28/gcc-countries-to-gather-for-extraordinary-consultative-session-in-jeddah>

Gulf leaders since hostilities opened on 28 February. The attendance said a good deal on its own. Qatar's emir, Kuwait's crown prince and Bahrain's king came as heads of delegation; the UAE was led by its foreign minister; Omani representation was reported in Saudi state media without naming the principal. Two of the six declined the summit's implicit demand for top-level presence on a question the host had framed as existential.

The output stayed at the level of rhetoric. The official readout invoked "regional and international developments" and the "coordination of efforts"; Qatar's emir called the meeting an embodiment of "the unified Gulf position"; the Secretary-General issued a separate statement condemning Iran's "blatant attacks." Absent from the day's communications was a joint negotiating mandate, a GCC-led mediation track, or any framework for the post-ceasefire diplomacy then under way in Islamabad. On the eve of the summit, Gargash had told a UAE audience that the council's wartime position had been "politically and militarily the weakest in history." The summit was, in effect, the reply to that critique: a declaration of unity without the instruments such a declaration requires. The choreography of 28 April made the gap plain. As Gulf leaders gathered in Jeddah to project a common front, the UAE energy ministry announced, the same day, its withdrawal from OPEC and OPEC+. One member was performing unity in one forum and dissolving multilateral discipline in another, inside a single news cycle. A summit meant to correct the GCC's weakness opened on the same day as an exit from an older and more tightly bound Gulf institution, ordered by the very capital that had diagnosed the weakness.

The clearest measure of that absence is institutional. The GCC entered the war with military instruments of its own: the Peninsula Shield Force, stood up in 1984 and last deployed to Bahrain in 2011; a unified military command its leaders had agreed to in principle years earlier; and a long-discussed joint air-defence network meant to pool early warning across the peninsula.¹⁴ None was activated. The thousands of projectiles brought down over

¹⁴ Amr Mostafa, "Gulf leaders seek progress on joint missile radar at Jeddah summit,"

the six weeks were engaged nationally or through bilateral channels with the United States and other Western partners, not through any GCC-run air picture. Kuwait's hundreds of incoming missiles and drones were its own to manage; the UAE's defence leaned on the Western support Gargash credited. An organisation that cannot switch on its own standing military machinery during the largest missile war in its history has gone beyond speaking with six voices. It is fighting with six hands.

When Bahrain moved to condemn Iran at the parliamentary level, it did so through the Inter-Parliamentary Union. When Qatar sought redress, it wrote to the UN, not to the GCC secretariat. When Saudi Arabia issued warnings, it did so in its national capacity. Pakistan, not the council or any of its members, mediated the ceasefire. Oman, historically the Gulf's quiet channel to Tehran, lost that brokering role to Islamabad and has since taken up a different file, negotiating the reopening of the Strait of Hormuz with Iran on its own account. Albudaiwi's message from Antalya, that normalisation remains the objective and that failure would be "a disaster," cannot be squared with the UAE's refusal of "cheap peace" or with Saudi Arabia's demand that Iran "recalculate." These are parallel tracks and that is why they do not add up to a collective strategy.

The OPEC departure and the council's silence on Iran are of a piece. OPEC carried six decades of history, formal production quotas, regular ministerial voting and a Vienna secretariat, binding machinery of a kind the GCC has never had. If that framework could not hold a member with nearly five million barrels a day of capacity and the ambition to produce still more, the expectation that a thinner institution would generate a single position on Tehran becomes harder to defend. What was visible in the statements of Riyadh, Manama, Doha and Muscat during the war is now visible in the architecture of energy coordination: Abu Dhabi has decided, in two domains within three weeks, that the price of multilateral discipline exceeds its return.

The National, 28 April 2026, <https://www.thenationalnews.com/news/gulf/2026/04/28/gulf-co-operation-council-holds-summit-in-saudi-arabias-jeddah/>

It might be objected that the exit was purely economic, the end of a quota dispute Abu Dhabi had been signalling since 2021¹⁵, and that it says nothing about Iran. But that is the point. In the security field and the energy field alike, the UAE decided that multilateral discipline cost more than it returned, and in both it chose national latitude over collective constraint. The motive is different; the instinct is the same.

What is often called “GCC policy toward Iran” is, on inspection, an aggregation of six national policies that happen to share an institutional frame. The council has mechanisms for economic coordination and certain defence-interoperability projects. It has never built the political instruments needed to bind its members to a common external line on the state that does most to shape their security environment. The forty-two-day war exposed this more sharply than any earlier crisis.

Nor does the institution offer any way of overriding these differences. The GCC decides by consensus; its charter gives the Supreme Council no power to bind a dissenting member, and there is no majority vote by which a Qatar or an Oman could be overruled. Each member, moreover, runs its security relationship with Washington bilaterally, through its own bases and its own arms pipeline, with no collective-defence commitment of the kind that disciplines a genuine alliance. The council was built less as an alliance against an outside adversary than as a club for the mutual preservation of ruling families, and a club organised around regime survival has no instrument that can force a member to treat its neighbour’s threat as its own. That distinction matters. Some of the Gulf’s divisions do come from genuinely divergent interests; Muscat’s stake in Tehran is not Abu Dhabi’s. But that is not the whole of it. Even where interests converged, as every capital’s did in wanting its airspace defended and its civilians spared, the council still produced no common instrument. Divergent interests explain

¹⁵ William F. Wechsler, “A long time coming’: How to understand the UAE’s decision to leave OPEC,” Atlantic Council, <https://www.atlanticcouncil.org/dispatches/a-long-time-coming-how-to-understand-the-uaes-decision-to-leave-opec/>

why agreement was hard. Institutional incapacity explains why even the agreement that was available was never reached.

Tehran has every reason to keep things this way. A Gulf that negotiated as one would confront Iran with a single adversary along the whole coast; a Gulf of six policies lets Iran strike Abu Dhabi while courting Muscat, and threaten Manama while thanking Doha for its restraint. Iranian officials treated the Gulf capitals differently through the war, naming some as enemies and casting others as misled bystanders, and that was deliberate. It is how a power behaves when it has never had to face a common front. August made the pattern concrete: in a single week, Iran-aligned fire hit Saudi and Emirati targets while Tehran finalised a shipping corridor with Muscat.

A Gulf in which Muscat refuses to name Iran, Abu Dhabi calls it the principal threat, Riyadh issues ultimatums, Doha demands compensation while keeping dialogue open, Manama and Kuwait City press for international condemnation, and the secretary-general in Riyadh speaks the language of partnership is a Gulf with no shared Iran policy. The more honest question is whether it was ever meant to have one, or whether the council was built from the start to coordinate states whose instincts toward Tehran were always going to diverge.

The absence of a shared policy has consequences. It leaves each capital to bargain with Tehran and Washington on its own. It invites outside mediators like Islamabad into a role the Gulf once kept for itself. And it means the next crisis will again find six governments improvising six separate responses. A council that cannot speak with one voice about the threat it was founded to manage will keep handing the management of that threat to others.

It is worth spelling out what a coordinated council could have done, because the charge here is not that unity was impossible. It is that the instruments for it were never built. Six states sharing one air picture would

have thinned the missile threat each faced alone. A single GCC negotiating mandate at the ceasefire table would have spared Islamabad the broker's role and kept the post-war settlement in Gulf hands. A joint compensation claim for Ras Laffan, Manama and the other civilian sites would have carried more weight at the UN than Qatar's letters did on their own. A common position on the Strait of Hormuz, the one interest no Gulf capital can opt out of, would have given the bloc leverage over Tehran that no member holds by itself. None of this called for surrendering sovereignty. It called for machinery the council never made.

Working around the council

The weeks after the Jeddah summit removed any doubt about the ceasefire. Iran-aligned groups kept striking Bahrain and Kuwait, and on occasion Jordan, with drones and ballistic missiles, drawing fresh statements from the GCC Ministerial Council and its secretary-general that condemned the "treacherous" attacks as "blatant aggression" and a "flagrant violation of international law".¹⁶ The Islamabad memorandum of 17 June bought a pause: a sixty-day cessation, a promise to reopen the Strait of Hormuz, another Pakistani signature on another Gulf arrangement. It held for three weeks. On 8 July Iranian forces went back to attacking commercial shipping in the strait, and the war resumed in full; Emirati officials called the second round heavier than the first. Riyadh pushed to revive the Pakistani track even as its own facilities came back under fire, while Abu Dhabi treated the renewed war as proof that its harder April line had been right. No Peninsula Shield deployment, no joint air picture and no single GCC voice accompanied the second round, any more than they had the first.

¹⁶ "The Iranian Regime's Continued Terrorist Acts Targeting Bahrain and Kuwait...", GCC Secretary-General statement, 6 June 2026 (GlobalSecurity), <https://www.globalsecurity.org/wmd/library/news/iran/2026/06/iran-260606-gcc01.htm>

Then, in the second week of August, the war produced its clearest verdict on the council, and the council's own leading member delivered it. On 7 August, at Al-Safa Palace in Mecca, Crown Prince Mohammed bin Salman signed a trilateral mutual-defence treaty with President Recep Tayyip Erdoğan of Turkey and Prime Minister Shehbaz Sharif of Pakistan. Its central clause commits the three states to treat an armed attack on any one of them as an attack on all, the commitment Gulf leaders have gestured at for four decades without ever giving it working machinery.¹⁷ The pact grew out of the Saudi–Pakistani defence agreement of September 2025, and the year of negotiation behind it means Riyadh went looking for outside guarantees before this war began and completed the purchase in the middle of it.¹⁸ Türkiye's Foreign Minister Hakan Fidan has sketched what comes next: ministerial committees, a military committee, a permanent secretariat expected in Saudi Arabia. Set that against the record. Forty-five years of Gulf summitry produced a Peninsula Shield Force that sat out the largest missile war in the region's history. One afternoon in Mecca produced a binding defence clause, a command structure and a secretariat. The kingdom that hosts the council's headquarters has concluded, in practice if not in words, that machinery that works has to be built elsewhere; no Gulf state was among the signatories.

The reaction inside the Gulf confirmed what the signature implied. Abu Dhabi's official response was muted. Its commentators were less careful: Abdulkhaleq Abdulla, a former adviser in the Emirati presidential court, publicly mocked Pakistan's ability to defend anyone, and Saudi and Emirati voices spent the following days quarrelling on the record over whether the kingdom should have gone outside the Gulf for its security at all.¹⁹ The

17 Priyanka Shankar, "Türkiye, Saudi Arabia, Pakistan sign joint defence agreement: What's in it?", Al Jazeera, 7 August 2026, <https://www.aljazeera.com/news/2026/8/7/turkiye-saudi-arabi-pakistan-sign-joint-defence-agreement-whats-in-it>

18 "Why Saudi Arabia, Pakistan, and Turkey just signed a defense pact," Atlantic Council, August 2026, <https://www.atlanticcouncil.org/dispatches/why-saudi-arabia-pakistan-and-turkey-just-signed-a-defense-pact/>

19 "Former UAE presidential aide's post mocking Pakistan exposes unease over Mecca

two camps visible since April, a Saudi-led group still betting on diplomacy, now backed by borrowed deterrence, and an Emirati one pressing Washington and Israel to see the confrontation through, have hardened into competing security architectures, one oriented toward Ankara and Islamabad, the other toward Washington and, tacitly, Tel Aviv.²⁰ A quarrel about policy has become a quarrel about structure, conducted in public, between the council's two most capable members.

The strait told the same story from the opposite direction. In the first week of August, Tehran and Muscat announced agreement on a shipping corridor through the Strait of Hormuz, the waterway that carries a fifth of the world's oil and had been closed to most traffic since the first weeks of the war.²¹ Iran's account of the terms deserves attention. American and Israeli vessels are banned outright; violators face fines of up to twenty per cent of cargo value; states judged to have damaged Iran are denied passage until compensation is paid; and navigation guidance, traffic monitoring and maritime security in the corridor fall to Iran.²² Washington spoke of a traffic scheme and said reopening was close; the Revolutionary Guard said the strait would open when the United States accepted Iran's conditions; Qatar called the channel critical; Pakistani mediators shuttled to Tehran.²³ Whatever finally emerges from that bargaining, its shape is already set.

pact," Middle East Eye, August 2026, <https://www.middleeasteye.net/news/emirati-academics-barbed-tweet-pakistan-exposes-uae-unease-over-mecca-pact>

20 Andrew Leber and Sam Worby, "Three Scenarios for the Gulf States After the Iran War," Carnegie Endowment for International Peace, April 2026, <https://carnegieendowment.org/emissary/2026/04/gulf-states-gcc-iran-war-three-scenarios>

21 Eltaf Najafizada, "Iran, Oman Reach Agreement on Proposed Strait of Hormuz Shipping Route," Bloomberg, 5 August 2026, <https://www.bloomberg.com/news/articles/2026-08-05/iran-says-agreement-on-hormuz-shipping-route-reached-with-oman>

22 Sameer Hashmi and A. Martinez, "Iran says agreement with Oman for Strait of Hormuz prohibits U.S. and Israeli vessels," NPR, 7 August 2026, <https://www.npr.org/2026/08/07/nx-s1-5923962/iran-says-agreement-with-oman-for-strait-of-hormuz-prohibits-u-s-and-israeli-vessels>

23 Caolân Magee, "Iran, Oman, US 'close' to Hormuz deal: What do they all want?," Al Jazeera, 5 August 2026, <https://www.aljazeera.com/news/2026/8/5/iran-oman-us-close-to-hormuz-deal-what-do-they-all-want>

The reopening of the Gulf's one indispensable waterway is being negotiated between Iran and a single GCC member, on terms drafted in Tehran, while the other five follow it in the press. A common Gulf position on Hormuz, described above as the one interest no capital can opt out of, was available all spring. Muscat has now answered the question alone, and the draft answer leaves it to Iran to decide who sails.

None of this diplomacy happened in calm. Kuwait intercepted Iranian drones on 1 August.²⁴ The Houthis claimed an attack on a Saudi tanker on 5 August, and Iran-aligned groups struck Saudi territory on the day the Mecca pact was signed.²⁵ In mid-August, missiles and drones hit three tankers of the UAE's national oil company in the strait within a single week, and the GCC secretary-general condemned the targeting as an unacceptable escalation and a grave violation of maritime law.²⁶ His condemnations have kept their wartime character: each one a declaration, none an instrument. Between the statements and the events they deplore stands no joint deterrent, no common negotiating mandate and no GCC channel to Tehran, in August as in March. The detail worth pausing on is whose tankers were burning. The member state most hostile to Iran was losing ships in the same strait whose reopening the member state most sympathetic to Iran was negotiating, and the council to which both belong had no part in either.

24 "GCC Secretary-General on Iranian attacks on civilian facilities in the State of Kuwait," GCC Secretariat statement, 1 August 2026, <https://www.globalsecurity.org/wmd/library/news/iran/2026/08/iran-260801-gcco1.htm>

25 "Houthis claim to attack Saudi oil tanker, Trump says Hormuz reopening 'soon'," CNN live coverage, 5 August 2026, <https://www.cnn.com/2026/08/05/world/live-news/iran-war-trump>

26 "GCC Secretary-General condemns repeated Iranian attacks on UAE ADNOC tankers and commercial ships in the Strait of Hormuz," GCC Secretariat statement, 15 August 2026, <https://www.globalsecurity.org/wmd/library/news/iran/2026/08/iran-260815-gcco1.htm>

The Gulf press read the UAE's withdrawal from OPEC as the opening move in a longer unwinding of Gulf multilateralism.²⁷ August supplied the second and third moves. In the spring one member walked out of the oldest and most binding piece of Gulf economic machinery; in the summer the council's largest member bought its collective-defence clause from two non-Arab states, and its most conciliatory member became Tehran's chosen counterpart for the peninsula's most important waterway. Riyadh went outside the council for deterrence. Muscat went outside it for accommodation. The two poles of Gulf opinion on Iran now agree on exactly one thing, and they show it in what they do: when a decision has to hold, it is not taken through the GCC. Nearly six months into the largest war in the council's history, that is the answer to the question this article opened with. There is no joint GCC foreign policy toward Iran because the states that could build one are already building around it.

²⁷ Asad Ullah, "Why the UAE's Opec exit spells the beginning of the end of Gulf unity," South China Morning Post, <https://www.scmp.com/opinion/world-opinion/article/3352666/why-uaes-opec-exit-spells-beginning-end-gulf-unity>



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