If Tehran Falls:
How Iran's Collapse Reshuffles Arab Gulf Relations

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I. Introduction

For the better part of a year, the Gulf states had been operating in what was effectively becoming a post-Iran strategic environment in which they saw the Islamic Republic as a receding hegemon. The systematic Israeli degradation of the Axis of Resistance through the destruction of Hamas as a military force,[1] the decapitation and disarmament of Hezbollah,[2] the fall of Assad's Syria in December 2024,[3] and the June 2025 air campaign against Iranian nuclear and military infrastructure[4] had already removed most of the operational ceilings that the Iranian threat had imposed on regional politics for decades. Well before the current conflict with Iran, therefore, the Gulf capitals drew the rational conclusion that the relevant competition is now among the Gulf states themselves, and between the Gulf states and Turkey, over who would lead the region in whatever comes next.

Saudi Arabia was the first mover. Riyadh's strategic pivot, visible since late last year, represented a fundamental reorientation. The kingdom was no longer behaving as a conservative stakeholder, but rather a revisionist power. The signs were a consolidating relationship with Turkey, renewed investment in Islamist and anti-Zionist rhetoric as instruments of regional influence, a deliberate freeze on normalization with Israel, and open confrontation with the UAE across multiple theaters — most immediately in Yemen, where Saudi and Emirati-backed forces clashed over competing visions of the country's political end-state, but also across the Red Sea corridor, the Horn of Africa, and the contest over Syria's reconstruction.

The Saudi-Emirati rivalry, which had been managed and largely suppressed for more than a decade under the shared Iranian threat, was now becoming the central axis of Gulf politics. And behind it lay the fact that the two forces that had disciplined intra-Gulf competition — American hegemonic management and the Iranian counter-system — were both receding. Washington had shifted from system manager to selective participant, its interventions episodic, transactional, and decoupled from any broader order-building objectives—as exemplified in the willingness of the second Trump administration to decouple its transactions with Gulf nations from the normalization process.[5] The Iranian axis was in ruins. With fewer external constraints, competition became direct, positional, and increasingly difficult to contain.

This was the environment in which Iran, in its final act, did something none of its Gulf neighbors had anticipated: it attacked all of them simultaneously to stop the American-Israeli joint operation against it.

II. The Gambit and Its Miscalculation

Iran's decision to strike Gulf state territory with ballistic missiles and drone barrages targeting Saudi Arabia, the UAE, Qatar, Kuwait, and Bahrain simultaneously, hitting airports, hotels, residential districts, embassies, and energy infrastructure across every GCC capital,[6] is not irrational. It follows a logic Tehran has tested before and found effective. The Gulf economic model, particularly the Emirati model, is built on the promise of stability: that capital, goods, and personnel flow freely. Iranian-backed strikes on Riyadh in 2019[7] and Abu Dhabi in 2022[8], which the U.S. failed to either prevent or meaningfully respond to, taught Tehran that hitting Gulf economic infrastructure produces political results disproportionate to its military investment, as seen in subsequent Saudi and Emirati outreach to Tehran.[9] By that logic, targeting the Gulf's promise of stability will translate into political pressure on Washington to end the current operation before it achieves its objectives.

But this is likely to prove to be a miscalculation. Previous Iranian provocations were deniable, limited, and targeted calibrated signals that sent messages without forcing confrontation. What is happening now is categorically different. The distinction between a single drone strike on an Aramco facility and ballistic missiles landing on civilian infrastructure in every Gulf capital within range is significant. It is the distinction between a signal and an act of war against the entire Gulf security system at once.

Thus, for Arab Gulf states, when the threat was occasional and deniable, hedging made sense — keep channels open to Tehran, diversify partnerships, avoid being drawn into an American confrontation that might end inconclusively. When Iranian missiles are striking your airports, your hotels, and your residential districts in broad daylight, hedging ceases to be a viable strategy and becomes a dangerous capitulation. The Gulf states did not choose this war, but Iran's decision to make them targets regardless of their diplomatic position is destroying whatever remained of the case for accommodation.

Many early signals confirm this change. Gulf states have announced penalties for filming attacks and damaged buildings,[10] the behavior of governments managing information for potentially a protracted fight, not preparing to sue for peace. Saudi Crown Prince Mohamed bin Salman (MbS) called the UAE's President Sheikh Mohamed bin Zayed (MbZ) within hours of the strikes,[11] a significant development given their increasingly antagonistic relationship. That call happened because both capitals understand that their feud has become a luxury neither can afford while ballistic missiles are targeting their sovereign territory. Qatar has condemned Iran in historically firm language — notable because Doha has maintained the most accommodating posture toward Tehran of any GCC capital for decades. Iranian missiles on Qatari soil have crossed a threshold that economic interdependence—like their co-management of the world's largest natural gas reserve,[12] and Iran's lifeline to Doha during the 2017 blockade[13]—cannot absorb.

The Gulf's emerging position likely sees the greater risk in stopping current operations too soon, leaving a regime that has demonstrated both the willingness and the capability to strike the Gulf's economic heart still standing and seeking revenge. But this tolerance, however firm in this moment, is not infinite. Washington and Jerusalem are operating on a clock set not only by their own military timelines but by the Gulf's diminishing reservoir of political and economic capital — a reservoir that drops faster if Iran escalates from hotels and airports to critical infrastructure such as desalination plants and power grids. The operation must demonstrably cripple Iran's ability to project force across the Gulf before the political will underwriting it exhausts itself.

III. The Suspended Pivot

Given its intensity, the war is clearly forcing a temporary but consequential suspension of the intra-Gulf competition that had taken a drastic turn with the Saudi operations against Emirati proxies in Yemen last December.[14] This is the first major effect, and it cuts against Saudi Arabia's prewar pivot from conservative stakeholder to revisionist actor.

Riyadh's recent pivot—the cultivation of relations with Turkey, the realignment with Qatar, the freeze on normalization, the weaponization of Palestine against the UAE-Israel de facto alliance —was calibrated against a configuration in which Iran existed as a weakened pariah, America was retreating, and the real game was intra-Sunni competition for primacy in the region. What MbS is getting instead is a fast post-Iran transition arriving through a war that is landing on his own soil. The difference between the two is the difference between strategic repositioning and crisis management. In the slow version, Riyadh controls the timeline. In the fast version, the timeline is controlled by the American-Israeli operation, and Riyadh is a passenger.

This causes massive incoherence to Saudi strategy. MbS cannot simultaneously position himself as the anti-Zionist custodian of Arab dignity and rely on American-Israeli military power to stop Iranian missiles from hitting his refineries. The two positions cannot survive the same news cycle. He has to choose, at least temporarily, and the missiles are choosing for him. The cooperation with Washington, the coordination with Abu Dhabi and Jerusalem, the implicit acceptance of an operation whose explicit objective is regime change in Iran are not strategic reversals but are forced tactical adjustments. And forced tactical adjustments, if they last long enough and if the conditions that produce them prove durable, have a way of becoming the new baseline.

Furthermore, the war imposes a harsh fiscal reality on Riyadh. The Saudi state’s post-oil transition, centered on the massive capital expenditure of Vision 2030, already in fiscal trouble,[15] assumes a regional security environment that permits long-term economic focus. The war undermines the stability needed to attract foreign investment and low insurance rates. Pivoting back to a security-first budget necessitated by the immediate, high-cost requirements of replenishing missile defense interceptors and repairing energy infrastructure threatens to further drain the very projects intended to secure Saudi Arabia’s economic future. This transforms the security crisis from a purely military concern into a threat to the Kingdom’s domestic development vision.

Another, deeper problem for Riyadh is that the Saudi preference for Iran was never regime change. It was managed containment — a weakened, isolated, Islamic Iran that justified Saudi heavy policing of its

Shia population and remained a pariah rather than becoming a normalized competitor for Western investment. A collapsing Iran producing regional chaos was the second-worst outcome; a possibly secular, reintegrated Iran competing for Western affections was the worst. Regime change was Israel's preference, not Saudi Arabia's.

This preference was indeed rational before the war. It was a peacetime calculation that made sense when Iran was being degraded at arm's length through sanctions and U.S.-Israel military deterrence, and Riyadh could sit back and prefer that the degradation be stopped short of collapse. It ceases to be rational the moment Iranian drones begin striking Saudi energy infrastructure. An Iran that has demonstrated it will target the economic foundation of the Saudi state in a direct conventional war is no longer the theoretical pariah Riyadh wanted to keep boxed. It is an existential threat whose removal, however inconvenient for Saudi long-term positioning, is now a short-term necessity.

The recalculation is therefore sequential, not singular. Phase one: survive the war, which means backing the American operation to its conclusion. Phase two: shape whatever comes next, which means competing for influence over Iran's transition, preventing being left out, and ensuring that the post-war regional order is not designed exclusively by Washington, Jerusalem, and Abu Dhabi. MbS can support regime change now because he needs the missiles to stop, while simultaneously preparing for the post-collapse competition he did not want to face yet.

IV. The Vindicated Axis

The second major structural effect of ongoing events is to validate the strategic UAE-Israel axis that Riyadh was trying to discredit.

The Saudi-Emirati rivalry has been fought on two registers. On the security register — military capability, intelligence cooperation, defense partnerships — the UAE holds several advantages, amplified by its alignment with Israel through the Abraham Accords and its dense network of logistics, basing, and commercial infrastructure extending from the eastern Mediterranean to the Horn of Africa. On the symbolic register of mass legitimacy, Islamic custodianship, narrative control, and the mobilization of Palestine as a political instrument, Saudi Arabia holds decisive advantages that the UAE, with its limited demographic weight and thin capacity for mass soft power, cannot match.

Riyadh's strategy has been to shift the competition onto the symbolic register, where its comparative advantages are greatest. The anti-Zionist turn, the renewed investment in Islamist rhetoric, the reframing of Emirati-Israeli alignment as betrayal of Arab unity — all of this is designed to force the contest onto terrain where Saudi Arabia wins, and the UAE loses.

Last week, the competition was shifting violently back onto the security register. Israeli intelligence and American firepower are defending Gulf airspace. The Abraham Accords partners are the ones providing the hard security that Gulf citizens can see working in real time. MbZ's bet that security cooperation with Jerusalem was the rational response to regional threats is paying off in the most dramatic possible way. The Gulf is shielded by integrated air and missile defense (IAMD), proving in real-time the value of the Abraham Accords and Israel's reassignment to U.S. Central Command. Every Gulf citizen watching the defense of their airspace is receiving the argument for normalization in a form more persuasive than any diplomat could deliver.

This does not permanently settle the register question. The symbolic register will reassert itself once the war stops, as it always does in the Middle East. But it is shifting the near-term balance and forcing Riyadh to compete, at least temporarily, on terrain that favors Abu Dhabi. The narrative that the UAE's alignment with Israel is a betrayal competes poorly, if not outright collapses, against the lived experience of an Iranian attack that the Abraham Accords partners are helping repel.

V. Qatar's Future

Another structural effect concerns Qatar, and it may be the most acute because this war threatens the coherence of a strategic model that has taken three decades to build.

Qatar's regional position rests on an architecture more complex than its small size suggests. The first and most visible pillar is the mediation brand. Qatar cultivates channels with actors whom other states refuse or cannot engage, making Doha indispensable and selling that access to Washington as a product. The second is the Iran relationship, which has functioned as existential insurance; when the Saudi-Emirati blockade hit Qatar in 2017, Iran opened its airspace and kept economic lifelines open, preventing the blockade from becoming a siege. The third, and arguably the most consequential, is the patronage of Islamist movements — the Muslim Brotherhood above all, but also Hamas, various Salafist networks, and the broader ecosystem of political Islam that Qatar has funded, housed, and amplified since the 1990s. The fourth is Al Jazeera, the most effective instrument of Arab populist mobilization in existence, and the only transnational Arabic media operation capable of shaping street-level opinion across the entire region. The fifth is the Western elite ecosystem of Education City, the Brookings Doha Center, think-tank funding, university endowments, prestige-sector patronage, and a parallel channel of influence that launders the entire operation into the language of dialogue, academic freedom, and conflict resolution.

These pillars form an integrated system. The Islamist networks provide the interlocutors that make mediation valuable. The Iran hedge provides the security cover that makes independence from Saudi Arabia possible. Al Jazeera amplifies the narratives that keep the populist constituency mobilized. The Western elite ecosystem insulates Qatari interests in Western capitals. The system works as a system, which means it is vulnerable as a system — and this war is testing multiple pillars simultaneously.

The mediation brand and the Iran hedge are collapsing in real time. Qatar has shot down two Iranian jets, condemned Tehran in the firmest language in its history, and threatened to expel Hamas leadership from Doha if they fail to condemn Tehran. That bridge has not merely been burned; it has been struck by a ballistic missile. Not much remains of the mediation portfolio: Hamas is militarily destroyed, the Taliban governs a failed state that has fallen off the international agenda, Iran is in ruins, and the Muslim Brotherhood networks are diminished and scattered. The model requires conflicts that are unresolved but communicable, situations where Doha's access to both sides generates brokerage value. The current trajectory is producing a different kind of Middle East: one where the major conflicts are being resolved by force and where the parties that made Qatar's access valuable are being destroyed or marginalized.

The war's disruption of liquefied natural gas (LNG) infrastructure makes this existential rather than merely strategic. Qatar is the world's largest LNG exporter. Iranian drones struck QatarEnergy's facilities at Ras Laffan Industrial City and Mesaieed Industrial City, forcing a complete halt of LNG production.[16] This is not a Hormuz problem — the transit route is secondary when the production infrastructure itself is burning. Qatar accounts for roughly a fifth of global LNG export capacity.[17] European gas prices spiked fifty percent within hours; Asian benchmarks jumped nearly forty percent.[18] Qatar's long-term contract holders in Europe and Asia are now facing an unprecedented supply gap,[19] and every day production stays offline, buyers look elsewhere. Some of that market share may not return. For Saudi Arabia, Iran's energy strikes are painful but survivable — the East-West bypass pipeline to Yanbu on the Red Sea provides overland alternatives.[20] For Qatar, there is no redundancy. The state that was supposed to guarantee Qatar's security against the Saudi-Emirati bloc has just demonstrated it can switch off Qatar's entire economy with a handful of drones.

The Islamist-populist pillar is not directly destroyed by this war's events, but it is being weakened by the broader post-October 7th trajectory. If the Islamic Republic's collapse represents the end of Islamism as a credible governing project, then Qatar's decades-long investment in Islamist movements is a depreciating asset. The organizational infrastructure retains instrumental value, but the political vision that gave those instruments their power is draining away. Al Jazeera faces the same disorientation. The network has spent two decades cultivating an Arab populist audience organized around anti-Zionist, pro-Resistance sentiment. That audience is now watching its own airports burn because of Iran while Israeli intelligence and American firepower defend their airspace. This does not permanently kill anti-Israel sentiment — nothing does — but it disrupts the narrative environment in which Qatar's populist investments generate returns, and Al Jazeera's editorial instincts may find themselves misaligned with the lived experience of the populations they are trying to reach.

The fifth pillar, the Western elite ecosystem, has not been destroyed by this war, but it has been under sustained assault since October 7th. Qatar's decades of funding to American universities, think tanks, and lobbying operations came under a level of scrutiny that no other foreign state has faced in recent memory. Many American Jewish civil society organizations made the exposure of Qatari influence networks a central priority. Congressional hearings and formal investigations into Qatari university funding and lobbying became a recurring event, now a sustained institutional process with subpoenas, testimony, and mounting pressure on recipient institutions to disclose and divest. The pressure already produced results. Texas A&M terminated its Education City campus agreement,[21] and Brown University ended a joint academic program with Qatar.[22] These were institutional withdrawals from partnerships worth tens of millions, signaling that the reputational cost of association with Doha had begun to exceed the financial incentive.

Qatar, then, faces a strategic triage with no good options. It could attempt reinvention — constructing a new model from scratch around new mediation opportunities and new sources of leverage — but this requires a strategic creativity Doha has not demonstrated since the 1990s, in an environment that rewards hard security and economic scale, neither of which Qatar possesses. It could try to convert Al-Udeid into a broader strategic alignment with Washington, positioning itself as America's most reliable Gulf partner. But the competition for that role is crowded, the UAE already occupies it with far more institutional depth and trust, thanks to the Abraham Accords, and becoming a compliant American client dissolves the independent positioning on which the Al Thani ruling family has staked its domestic legitimacy.

It could drop the Islamist portfolio entirely, shed the Brotherhood patronage, distance itself from the populist mobilization game, and reposition as a clean, post-ideological Gulf state that offers Washington reliability without baggage. This is the option American policymakers would most like to see, but it requires Qatar to dismantle the very infrastructure that made it relevant, and relevance is not something small states surrender voluntarily.

It also could accept subordination to Saudi Arabia, trading its remaining tools for Saudi protection — the most likely outcome, but one that ends the three-decade experiment in independent strategic agency. What makes this more complex than simple absorption is that Qatar possesses tools MbS needs: Al Jazeera, the Western institutional networks, the Brotherhood relationships. The negotiation is not whether Qatar returns to the Saudi orbit but the terms. It could deepen the Turkish partnership, Ankara replacing Tehran as the external guarantor of Qatari independence. But Erdogan does not want to protect Qatar's independence; he wants to use Qatar's money and media for Turkish objectives. And it could attempt to balance between all of them, threading between Riyadh, Abu Dhabi, Ankara, and Jerusalem to maintain independence through equipoise. This is the most Qatari option, and there is a logic to it: in a genuinely multipolar regional environment, a small state maintaining relationships with all competing parties becomes valuable to each as a back channel to the others.

Another likely, yet uncertain, trajectory is less dramatic than any of these scenarios suggest. Qatar is too wealthy to lose and too influential to be ignored. What is more likely is a slow normalization, a regression toward a mean where Qatar is what its geography and demography have always suggested it should be: a very rich, very small peninsula that hosts a very large American air base and sells a very large amount of natural gas, but no longer shapes regional outcomes disproportionate to its size. In other words, the end of Qatari exceptionalism. The thirty-year experiment in punching above its weight depended on a specific regional configuration that is now unraveling. The money and gas stay. Al-Udeid, too, stays. Al Jazeera survives in some form. But the conditions that allowed a state of three hundred thousand citizens to shape the politics of a region of four hundred million may simply be disappearing.

VI. The Receding Hegemon

Iran is a structure-setting state, one of the pillars on which the entire regional architecture, including the architecture of its enemies, rests. The Iranian threat has been the ceiling on Gulf competition. It has been the reason Saudi Arabia and the UAE managed their rivalry rather than letting it escalate. It has been the organizing principle around which the American military presence is justified, the Abraham Accords are structured, and the region's diplomatic geometry is arranged. Every significant relationship in the Middle East is triangulated through Tehran.

Remove this variable, and you do not clear the board but collapse it. Every question the region thought it had settled reopens simultaneously, and no one — not Washington, not Riyadh, not Jerusalem — has answers.

The competition over the spoils is the most immediate consequence. Iraq is the big one. Both Riyadh and Abu Dhabi, and certainly Ankara with its deep interest in the Kurds, will want influence in a post-Iranian Iraq, with different factions, different economic relationships, and different visions of what Iraqi reconstruction looks like. Yemen is the other; without Iranian backing for the Houthis, the southern question becomes a purely Saudi-Emirati contest with no external arbiter.

Moreover, news of a possible American-sponsored Kurdish ground offensive against the Iranian regime[23] is already complicating the competition over a post-Iran Iraq. Any empowerment of Kurdish political or territorial claims in a post-Islamic Republic Iran complicates the foundations of the Saudi-Turkish relationship that Riyadh has been cultivating as its primary hedge against the UAE-Israel axis. Ankara's tolerance for Kurdish autonomy anywhere is approximately zero, and Turkey has already signaled alarm. The Kurdish play thus does not merely add a front to the war. It introduces a fault line into the post-war competition that runs directly through the partnership Riyadh was counting on most.

Turkey complicates every one of these contests. Erdogan already has forces in Syria, influence in Iraq, a base in Qatar, and a footprint in Libya and the Horn of Africa. He naturally cannot have the same authority that gave Iran its reach among Shia populations, but he is competing for something arguably more consequential to the Gulf states: Sunni leadership. In any post-Iran competition over Syria, Iraq, or the Red Sea corridor, Turkey injects a non-Gulf actor with military capacity, geographic proximity, and ideological reach that money alone cannot offset. This creates a paradox for the Gulf. The Saudi pivot toward Ankara was calibrated as a partnership against the UAE-Israel axis, but Turkey is not a Saudi instrument, and Erdogan's ambitions for regional primacy overlap with Riyadh's on almost every file. And for the UAE, Turkish competition is the most threatening because it operates on precisely the terrain where Abu Dhabi is weakest: mass politics and populist-Islamist mobilization. The post-Iran Middle East may not be the Gulf-managed space that Gulf capitals have been planning for. It may be a Turkish-contested one.

Does the removal of Iran strengthen or weaken the case for American presence in the Gulf? The entire US military architecture in the region — the bases in Qatar, Kuwait, Bahrain, the UAE, the Fifth Fleet — is justified by the Iranian threat. Remove the threat, and the structural argument for Gulf dependence on Washington dissolves. The Gulf states do not return to a closer relationship with Washington; they accelerate toward the strategic autonomy they are already pursuing, now armed with the argument that the threat requiring American protection no longer exists.

And there is a further complication: if the Islamic Republic collapses and what emerges is some form of a non-Islamist or reformist government, Riyadh faces precisely the competitor it was most determined to avoid. A weak, Islamic, internationally isolated Iran was a strategic asset for Saudi Arabia. A post-Islamic Republic Iran, even if it is a non-democratic military regime, that is somewhat open to Western capital, may compete with Saudi Arabia on every dimension that Vision 2030 is designed to dominate, and it competes with structural advantages Riyadh cannot replicate: eighty-eight million people, a far more educated workforce, and the narrative of moral triumph.

Finally, Saudi-Israeli normalization may still happen, but the incentives are becoming weaker, if not running in the other direction.

Everything remains fluid. The operation is still underway. The IRGC's future is not yet determined, and the fate of the Islamic Republic is not settled. Gulf tolerance for sustained punishment has not been tested to its limits. And the post-war order, if there is one, has not begun to be negotiated. Any analysis offered at this hour carries the inherent risk of being overtaken by events within days.

What can be said with confidence is this: the state whose existence has organized the Middle East for four decades is dying, and its death is going to compound complexity. The Gulf competition that was already underway has been interrupted by a war, could be accelerated by its consequences, and complicated further by the disappearance of the threat that made the competition manageable. The region is entering a period of radical uncertainty in which the old constraints are falling, the new ones have not yet formed, and every actor is simultaneously improvising.

The next days and weeks will determine much. But the reshuffling of Gulf politics that this war is setting in motion will take years to resolve, and its ultimate shape will depend less on what is being destroyed in Iran than on what the Gulf states build — or fail to build — in its absence.

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