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Expert Explains | From Saudi to Kuwait, how US-Iran war is forcing Gulf states to rethink security strategies

Kuwait has ratified a 2023 defence pact with Pakistan, while Qatar has committed to deepening its security cooperation with Pakistan. Saudi Arabia, meanwhile, will have to navigate renewed Houthi attacks while protecting its nuclear ambitions and economic stability.



A billboard in Tehran depicts US President Donald Trump with hands around his neck alongside the message "Revenge is inevitable" on Monday, July 27. AP

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After nearly two weeks of the Iran war, of **US strikes on Iran and Iranian retaliation** against targets in Gulf Arab states, both sides ceased their attacks by July 25.

US CENTCOM Commander Admiral Brad Cooper reportedly recommended halting the US bombardment — which was focused on degrading Iran's capabilities to target shipping in the Strait of Hormuz — as it had reached “the limit of its effectiveness”.

The region is now coming up with strategies to deal with this conflict's fallout.

Kuwait ratified a June 2023 Defence Cooperation Agreement (DCA) with Pakistan on July 26 for a five-year period, while Qatar committed to deepening its security cooperation with Pakistan during bilateral talks in Doha the following day.

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Meanwhile, the US-Iran war has also reignited the war between the Yemeni Houthis and Saudi Arabia, which has been dormant since 2022. The subsequent Houthi attacks on Red Sea shipping have meant that both the sea and the strait flanking the

Arabian Peninsula were simultaneously under fire, for the first time in history, until the US-Iran exchanges ceased on July 25.

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US-Iran: State of Play

On July 27, Washington's UN Ambassador said President [Donald Trump](#) wanted to give negotiations a chance again, with Trump himself stating "friendly negotiations" were underway on Iran's request.

Tehran expectedly rejected this characterisation, with the semi-official *Tasnim News* asserting that it was Washington that had requested talks. As this author [wrote on July 3](#), any kinetic action between both sides would be, in effect, an effort to improve their bargaining positions and degrade the other's.

Since early July, as Iran rejected American efforts to push through a new shipping channel through Omani waters and targeted ships that did not coordinate with Iran, the US resumed kinetic action (just short of the March war's scale) with a focus on degrading Iran's ability to enforce the Memorandum of Understanding's Article 5, which allowed joint Iranian and Omani administration of the Strait.



Cargo ships in the Strait of Hormuz off Bandar Abbas, Iran, on Tuesday, June 30. AP

This would in turn weaken Iran's bargaining power during nuclear negotiations. Neither has occurred.

Iran's control of Hormuz remains, Tehran and Muscat have continued holding technical negotiations to finalize arrangements to enforce Article 5, and Iran has broadened these talks to include Saudi Arabia, as evidenced by Iranian Foreign Minister Abbas Araghchi's talks with his Saudi counterpart Faisal bin Farhan on July 28.

Moreover, Iran arguably deems its own case for nuclear enrichment to be further strengthened due to Saudi Arabia signing a 123 Agreement with the US on July 22, to begin bilateral nuclear energy cooperation. Should Riyadh gain the right to enrich uranium on its soil, Tehran is likely to concede lesser than earlier on the scope of its own enrichment rights.

Hence, Washington will likely be again incentivised to hit Iranian nuclear targets as well as its Hormuz infrastructure, until it is satisfied with the degradation of Iranian capabilities. The yardstick is likely to be self-defined, given the objective failure of US war aims thus far.

Fallout one: Kuwait-Pakistan

The recurring fighting between the US and Iran, as well as pauses between kinetic action, have reinforced an old learning in key Arab states, that regardless of their current dependence on foreign arms, internal capability development as well as improved military training is an inescapable long-term need. Hence, Kuwait's DCA with Pakistan focuses on military training, education, intelligence sharing, logistics, defense technology, research and exchanges of expertise.

The agreement does not mimic the Saudi-Pakistan Strategic Mutual Defense Agreement (SDMA), signed in September 2025, given that it does not bind either party to the other's defense when they are attacked.

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The SMDA, however, arguably serves as a major precedent, pushing Kuwait to substantiate an older framework of cooperation with Pakistan. The pact has already shown that true mutual defence commitments are not the principal objective of Arab states with Pakistan — neither has Pakistan struck Iran or Houthi-controlled Yemeni territories nor has Saudi Arabia struck Afghanistan since the SMDA was signed.

Rather, the SMDA itself is arguably meant to entrench Pakistan's role in Saudi capability build-up in the long term, while Riyadh adopts a mix of means to tackle present threats.

For states such as Kuwait and Qatar (along with other GCC states), intra-Gulf geopolitical divergences are secondary to the objective of securing long-term defence partners whose expertise can be leveraged for building up domestic capability.

This means even if Pakistan is viewed differently by each of these states, its value as a security partner overrides these differences. That Pakistan is reliant on these states for economic stability, adds a unique layer of assurance and leverage.

Fallout two: Houthi-Saudi Arabia

Among the most crucial fallouts of the US-Iran war is the return of Saudi-Houthi fighting since July 14, when the Saudi-based Yemeni government in exile bombed the Houthi-controlled Sana'a Airport to reportedly prevent an Iranian plane from landing. In response, the Houthis fired ballistic missiles into Saudi territory and declared a naval blockade of Saudi Arabia in the Bab-el-Mandeb strait — an unprecedented action since both their 2022 truce as well as the outbreak of Israel's war in Gaza in October 2023.

In turn, Saudi Arabia bombed the Houthi-controlled Hodeida port, which handles over 70% of Yemen's logistics, trade, and humanitarian aid. It is this action which provoked a Houthi escalation, targeting Saudi Aramco oil facilities, forcing the energy giant to partially shut down its 4,00,000-mbd (million barrels per day) Jazan Refinery.

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Despite this US-Iran spawned Saudi-Houthi escalation, it is unlikely that Riyadh looks to proactively return to full-scale fighting in Yemen. It was Houthi attacks against Aramco facilities in Abqaiq and Khurais in 2019 that had prompted a shift in

Saudi strategy towards both Yemen and Iran, prioritising engagement as the path to stability.

For perspective, despite the Yemeni Houthis claiming responsibility for the 2026 Aramco attack, Riyadh participated in US strikes on Iran-backed militias in Iraq on July 29. This reflects the Saudi desire to satisfy its deterrence needs by acting against other parts of Iran's Axis of Resistance, instead of risking a larger war with the Houthis.

Now, Riyadh's need for regional stability increases significantly due to the 123 Agreement and its long-due quest for nuclear power. Apart from the recent Houthi attacks against vital oil infrastructure, a drone hit on the UAE's new Barakah nuclear plant in May had risked bringing back post-Fukushima concerns in Arab states vis-à-vis the safety of nuclear power plants. Naturally, a Houthi attack on a future Saudi nuclear power plant will often be more dangerous than strikes on oil facilities.

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While the elements of the US-Saudi 123 Agreement remain unclear (since Riyadh has not yet committed to recognize Israel, as Trump claimed Saudi Arabia would), the need to prevent a "broken windows effect" from permanently damaging Arab economies is an imperative regional need.

Presently, the Trump administration is dealing with several war-time pressures including munitions depletion as well as an increasing casualty count in what has largely been a stand-off war thus far (600 according to *CNN* on July 27).

For perspective, US casualties in Afghanistan in the first four months of the war on terror were below 20, while those from the Iraq war (featuring a ground invasion)

touched 700 in the same period. Nonetheless, the Trump Administration is seemingly focused on preventing Iran from materially gaining from the MoU's provisions, which leaves room for more strike exchanges before substantial negotiations for a final deal begin. For regional states, this predicament is as untenable as a potential return to full-scale war.

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