strengthens hardline security thinking and reduces opportunities for regional diplomacy.
A sustainable regional security framework requires inclusive diplomacy rather than permanent geopolitical exclusion.
This does not necessarily imply the absence of competition between regional powers. Rivalries will continue to exist. However, effective regional order requires mechanisms capable of managing competition rather than endlessly escalating it. Without such mechanisms, instability becomes structurally embedded within the regional system itself.
The long-term challenge for Washington is that military alliances alone cannot provide political legitimacy for regional order. Stability ultimately depends on whether regional actors themselves perceive the security architecture as balanced, inclusive and sustainable.

The missing element: intellectual and academic diplomacy

Perhaps one of the most overlooked dimensions of the 2025 US National Security Strategy is its limited attention to intellectual, academic and societal dialogue in regional conflict management.
The crises of the Middle East are not purely military or security-related. They are also rooted in mutual mistrust, competing historical narratives, weak communication channels and the absence of sustainable regional dialogue mechanisms.
Military deterrence alone cannot create lasting stability.
The region increasingly requires what may be described as "elite diplomacy" — a framework in which universities, think tanks, scholars and intellectuals contribute to confidence-building, conflict reduction and regional understanding. Without such mechanisms, geopolitical tensions are likely to reproduce themselves regardless of shifting military balances.
Academic diplomacy can serve as an important bridge where formal political negotiations fail. Intellectual engagement helps reduce strategic misperceptions, promotes communication among regional elites and creates space for long-term confidence-building initiatives.
Historically, many major geopolitical rivalries were eventually moderated not only through military balance but also through sustained intellectual and institutional dialogue. The Middle East today suffers from a severe deficit of such dialogue mechanisms.
A future-oriented regional strategy should therefore invest not only in military alliances and economic projects, but also in educational exchanges, regional research institutions and platforms for sustained policy dialogue among regional actors.

A strategic reality Washington cannot ignore

Ultimately, Iran cannot simply be defined as a manageable security challenge. Iran constitutes an integral part of the Middle East's geopolitical, historical and civilizational structure. Any future regional order that attempts to marginalize Iran or reduce its role to a containment problem will inevitably face structural limitations.
The central issue is not whether Washington agrees with Iranian regional policies. Rather, the issue is whether American strategy is prepared to recognize that durable regional stability requires acknowledging geopolitical realities instead of attempting to bypass them.
The Middle East is no longer entering an era defined exclusively by oil geopolitics or traditional military competition.
The region is gradually evolving toward a more complex environment shaped by technology, connectivity, economics and strategic interdependence. Yet this transition cannot succeed under conditions of permanent confrontation and strategic exclusion.
The future stability of the region will depend not only on military deterrence, but also on whether regional and global actors can construct a more inclusive security framework capable of balancing competition with cooperation.
The fundamental question today is whether Washington is prepared to fundamentally reconsider its understanding of Iran and the Middle East — or whether it will continue attempting to manage an increasingly complex region through outdated geopolitical assumptions.
The future of regional stability may depend largely on the answer.

Rearming after war a challenge for Persian Gulf states

By Albert Vidal Ribe
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OPINION

Although most Arab Persian Gulf states had invested heavily in air- and missile-defence systems during the past decade, Iran's missile and uninhabited aerial vehicle (UAV) attacks in 2026 have depleted magazines and highlighted capability gaps that those countries are now seeking to fill. However, demand for these systems is at an all-time high and production of many of them remains slow.

Persian Gulf states go shopping

In recent weeks, the Persian Gulf states have accelerated their search for new air-defence systems after suffering from thousands of Iranian missile and UAV attacks. South Korea, Ukraine, the United Kingdom and the United States are among those countries that have been approached by Persian Gulf states interested in near-term acquisitions, which include interceptor missiles, interceptor UAVs, point-defence systems, radar and surface-to-air missile systems (see Table 1). Some Persian Gulf states are also exploring accelerating the delivery of existing orders.
The US has approved over $41 billion in emergency arms sales to the Persian Gulf states since March 19 (of which $17bn went unannounced), with around half of it allocated to Patriot interceptors. Meanwhile, on March 18, the UK government convened a meeting of 13 defence companies and Persian Gulf ambassadors and defence attachés to explore how the UK's defence industry could support its partners in the region. London also created a task force to help fast-track financing and licensing of defence exports to its Persian Gulf partners.
Ukraine's President Volodymyr Zelenskyy visited the Persian Gulf in March and again in April and May, signing defence agreements with Qatar, Saudi Arabia and the United Arab Emirates (UAE). These agreements could be the foundation of co-production partnerships and build manufacturing capacity in Ukraine and the Persian Gulf. Zelenskyy said on April 10 that discussions were also ongoing with Bahrain, Kuwait and Oman.

Challenges

Despite this rush of activity, replenishing stocks of more advanced weaponry, such as the US Patriot long-range air- and missile-defence system, will not be easy, requiring a swift freeing-up of additional funding amid economic strain. Long lead times, supply-chain bottlenecks, workforce constraints and material availability also pose challenges to manufacturing at speed. Downsizing in the US and European defence-industrial base in the 1990s led to lower production rates and contraction within the supply chain. In the guided-weapons realm, this trend was particularly true for rocket motors in the US.
There have been recent efforts by US President Donald Trump's second administration to expand production, but growth has been slower than hoped for. COVID-19 caused production and supply-chain issues, and saw many experienced staff retire early. Relatively high inflation and energy costs have eaten away at much of the recent extra investment. In Europe, multinational production has often been determined by industrial politics rather than economic efficiency, and China's restrictions on the export of critical raw materials in 2023 and 2025 have caused further problems. Meanwhile, new staff and factories take several years to come online.
After overcoming long lead times and supply-chain constraints, the US and Israel will still need to first re-stock their own inventories of missile interceptors, having used hundreds to defend against Iranian attacks. Even before the recent conflict, customers of US systems had experienced delays to delivery as a result of the US prioritising refilling its own inventories and supplying Ukraine and Taiwan. In Europe, Ukrainian demand is often the priority for deliveries.
Moreover, many European countries are planning to significantly increase their air-defence forces and magazine depths, which might further disadvantage extra-regional customers.
The Arab Persian Gulf states have long had big ambitions for their own defence industries, which have included development and production of air-defence systems. However, the UAE is the only country in the Persian Gulf Cooperation Council indigenously developing air-defence systems, and most relevant programmes are still under development, with some at an early stage. And even if some programmes, such as the Shadow-3 interceptor UAV, reach production and are eventually fielded, they could struggle to compete against combat-proven counterparts.

Low-cost solutions to fill the gap

While all countries continue to grapple with production challenges for the more complex air-defence systems, a range of low-cost systems are now available. Although there are production challenges for some of these systems, such as China's dominance in the production of dual-use components relevant to low-cost UAVs, they are less expensive and often delivered much more quickly. Many of these systems have also been proven against similar one-way attack UAVs in Ukraine. These interceptor drones, lasers or gun systems cannot replace the capabilities provided by ballistic-missile-defence systems such as Terminal High Altitude Area Defense (THAAD), but they can deal with Iran's own lower-cost offensive systems such as Shahed UAVs. As the Persian Gulf states' industrial capabilities remain limited in this area, they will need to continue partnering with external actors. Official claims that the UAE neutralised 85% of the UAVs targeting the country with locally made jammers such as NAVCONTROL should be taken with caution.
The UK's recent announcement of a contract for Cambridge Aerospace's Skyhammer interceptor, both for itself and Persian Gulf partners, provides one such example. BAE Systems' APKWS-II, of which the US has approved combined sales of 11,500 to the Persian Gulf states since March, is seen as another low-cost solution against UAVs. Zelenskyy's tour of the region and conclusion of several defence agreements represent yet another strand of this trend. Although the details of these deals have not been disclosed, Ukraine's conflict experience, proficiency in air-defence hardware and ability to coordinate different "sensors and shooters" could be of significant value. Since late 2024, Kyiv has begun to re-emerge as a potential exporter of defence technology and know-how rather than simply a recipient, but its own demand continues to be high and it remains to be seen how Ukraine's offer of help will work in practice.

Outlook

The challenge for the Persian Gulf states will not end when the deliveries are completed. They will then need to integrate these systems into their forces, create adequate training pipelines and adjust their doctrines and defensive postures.

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Visitors stand in front of a Fatah-II guided rocket (L) and a SMASH anti-ship missile during the World Defence Show in Riyadh, Saudi Arabia, on February 9, 2026.
FAYEZ NURELDINE/AFP

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Table 1: **Selected requests, expressions of interest, FMS approvals and contract signings for air-defence systems by the Arab Gulf states since March 2026**

Recipient	Designation	Classification	Supplier	Supplier country	Status
UAE	*Cheongung*-II (KM-SAM Block II)	MR SAM System	LIG Nex1	South Korea	Deliveries in progress*
Kuwait	AMRAAM-ER	MR SAM System	Raytheon	US	Contract signed**
Saudi Arabia	*Cheongung*-II (KM-SAM Block II)	MR SAM System	LIG Nex1	South Korea	Contract signed***
UAE	P-1 *Sun*	Interceptor UAV	SkyFall	Ukraine	Contract signed
Several Gulf states	*Skyhammer*	Interceptor Missile	Cambridge Aerospace	UK	Contract signed
Kuwait	*Lower Tier Air and Missile Defense Sensor Radars*	Radar	RTX	US	FMS approval
Kuwait	*Integrated Battle Command System*	C2 System	Northrop Grumman; RTX; Lockheed Martin	US	FMS approval
Qatar; UAE	APKWS-II	ASM	BAE Systems	US	FMS approvals
Qatar; Kuwait; UAE; Bahrain	PAC-2 GEM-T; PAC-3 MSE	SAM	Lockheed Martin; RTX	US	FMS approvals
UAE	AIM-120C AMRAAM	ARH AAM	RTX	US	FMS approval
UAE	FS-LIDS	Point-defence Towed SAM System	RTX	US	FMS approval
UAE	*Long-Range Discrimination Radar*	Radar	Lockheed Martin	US	FMS approval
Qatar; several Gulf states	*Cheongung*-II (KM-SAM Block II)	MR SAM System	LIG Nex1	South Korea	Interest
Saudi Arabia	P-1 *Sun*	Interceptor UAV	SkyFall	Ukraine	Interest
Saudi Arabia	*Sting*	Interceptor UAV	Wild Hornets	Ukraine	Interest
Saudi Arabia	n.k.	Electronic Warfare system	Phantom Defense	Ukraine	Interest
Saudi Arabia	PAC-3 MSE	SAM	Mitsubishi Heavy Industries; Lockheed Martin	Japan; US	Interest†
UAE; Qatar; Kuwait	*Octopus*-100	Interceptor UAV	TAF Industries	Ukraine	Interest
UAE; several Gulf states	L-SAM	LR SAM System	LIG Nex1; Hanwha	South Korea	Interest
Several Gulf states	*Terra* A1	Interceptor UAV	Terra Drone; Amazing Drones	Japan; Ukraine	Interest
Several Gulf states	*Magura*	Uninhabited Surface Vessel	Uforce	Ukraine; UK	Interest
Several Gulf states	*Mark* I	Low-cost SR Missile	Frankenburg Technologies	UK	Interest
Several Gulf states	*Guardian*-1	Interceptor UAV	Powerus	US	Interest
Several Gulf states	*Phalanx*	Close-In Weapons System	RTX	US	Interest

AAM = Air-to-air missile; **ARH** = Active radar homing; **ASM** = Air-to-surface missile; **C2** = Command-and-control; **FMS** = Foreign military sales; **LR** = Long-range; **MR** = Medium-range; **SAM** = Surface-to-air missile; **SR** = Short-range; **UAV** = Uninhabited aerial vehicle
*Request to accelerate deliveries (signed in 2022). **To be used in NASAMS. ***Request to accelerate deliveries (signed in 2024). †Manufactured under licence in Japan.

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