

GCC defense and security strategic perspective 2026

Built to fight. Now build to last:
a GCC resilience agenda
for the era of system warfare



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Member countries of the Gulf Cooperation Council (GCC) have spent a decade building traditional defense paradigms. The next decade requires something different: the ability to absorb stress to its economic nervous system, sustain operations under prolonged pressure, and recover faster than any external actor can convert temporary pressures into strategic advantage.

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Executive summary

This paper discusses that the central defense challenge for GCC member countries is no longer deterrence alone. Instead, it is resilience, the ability to preserve economic function, sustain operational continuity and recover faster than external actors can make use of disruption to their advantage. In the current environment, resilience is not a supporting feature of defense policy — it is the condition for military effectiveness, economic continuity and long-term competitiveness.

A result of the conflict in the Middle East was the first effective closure of the Strait of Hormuz in modern history, a significant impact to global energy markets, and a direct stress test of the alliances, supply chains and infrastructure systems the GCC had built over the previous decade. This was not pressure on a single operational node. Rather, it tested the resilience of the GCC's economic operating system as a whole: energy flows, logistics corridors, financial confidence, investor sentiment and the space-enabled services supporting communications, navigation, maritime visibility and decision-making.

The strategic lesson is clear. The geopolitical transition has reinforced three realities long understood by defense planners but not fully reflected in policy.

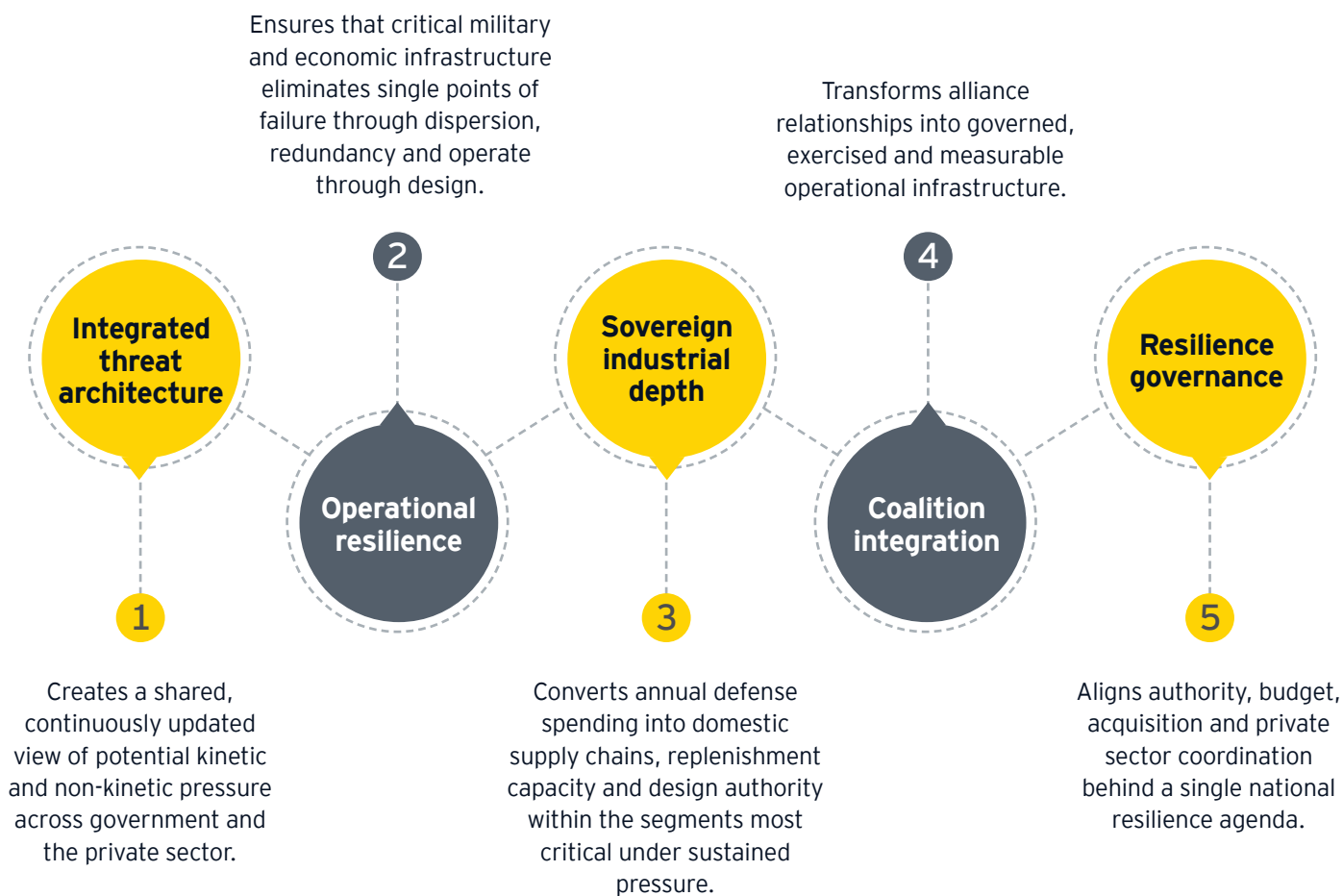
- 1 The implementation framework needed to convert the strong collective commitments of the region and bilateral partnerships into integrated, coordinated performance under simultaneous pressure remains the priority development area.
- 2 Most of the critical economic infrastructures were not designed to continue functioning under disruption.
- 3 The most consequential challenge is no longer defined only by conventional force-on-force confrontation, but by the ability to preserve economic continuity under pressure.

A fourth reality now sits alongside these; space is no longer a peripheral enabler. It is part of the economic operating system itself.

The underlying logic is asymmetric. Disruption is relatively inexpensive to generate; while sustaining defense capacity is expensive to maintain. This asymmetry makes resilience the decisive strategic variable. The core design criterion for GCC defense and security investment must therefore shift from “can we overcome the threat?” to “can the economy continue operating as the disruption is addressed, with recovery progressing faster than any advantage derived from it? States that can answer yes to the second question will retain investor confidence, deepen alliance credibility and attract strategic industries. States that do not demonstrate resilience credentials risk a gradual erosion of investor confidence and reduced strategic capital allocation.



This paper sets out five mutually reinforcing levers for resilience across the GCC:



These levers must be sequenced across three horizons: stabilize the system now, build recoverability in the next phase and institutionalize enduring resilience over the decade ahead.

The investment case is direct. GCC states and institutions that sustain continuity, preserve investor confidence and deepen industrial capability during the current period will emerge with compounding advantages in market credibility, alliance relationships and strategic autonomy. In this environment, resilience is not only a security outcome but also a market signal.

The resilience agenda proposed here is complementary to, not a substitute for, diplomatic engagement. The most durable security outcome for the GCC is one in which economic continuity and military credibility support the political conditions for regional stability. A resilient GCC preserves its freedom of action — including the diplomatic flexibility to pursue de-escalation channels — because security and economic continuity do not depend on any single strategic outcome.



Section

01

A formidable foundation

The GCC states entered the current conflict in the Middle East with a formidable defense foundation built through sustained investment, real capability depth across multiple operational domains and valuable alliance interoperability. This starting point matters, as the region is working from an existing position of strength. The strategic task is therefore to convert an already substantial base into integrated resilience.

1

A decade of sustained investment

Collectively, GCC states spend roughly US\$130b annually on defense, placing the region among the world's largest defense investors on both a per-capita and per-GDP basis. Saudi Arabia has consistently ranked among the world's largest defense spenders, while the United Arab

Emirates (UAE) and Qatar remain among the highest per-capita spenders globally.¹ This platform reflects a long-term political commitment to security that has endured through oil-price volatility, the COVID-19 pandemic disruption and the current regional situation. The significance of that continuity is strategic. It indicates that current exposures do not arise from spending levels alone, but from the need to translate scale into greater resilience, readiness and sovereign sustainment.

2

Capability depth across five domains

GCC states' investment in defense has produced real capability depth. In air and missile defense, layered systems protect critical economic and population centers and have already been tested under live operational conditions. The central challenge, however, has evolved. The question is no longer only whether the GCC can intercept incoming threats, but whether it can sustain magazine depth and replenishment under prolonged saturation conditions designed to exhaust high-value interceptors faster than they can be regenerated. In strategic terms, interceptor economics and industrial replenishment have become operational concerns, not downstream procurement matters.

Case study

1

2019 Gulf energy infrastructure disruptions: concentration risk and market consequences

The 2019 disruptions to Gulf energy infrastructure demonstrated that concentration of critical processing creates systemic market exposures disproportionate to the physical scale of any single incident – a lesson that the GCC has actively incorporated into its resilience planning since. The subsequent investment program has directly addressed this limitation through distributed processing capacity and hardened infrastructure.²

Naval and coastguard capabilities in the GCC have evolved beyond territorial defense toward active sea-lane protection. This shift reflects in the economic geography of the region. Maritime security in the Gulf is inseparable from energy transit, freight continuity, insurance pricing and investor confidence. The Strait of Hormuz and the

Bab-el-Mandeb are not just transit corridors – they are economic pressure points with global significance. The conflict in the Middle East has reinforced that disruption at sea carries immediate financial consequences well beyond the military domain.⁴

Case study

2

Maritime disruption: from pattern to economic consequence

Since 2017, the Washington Institute for Near East Policy tracker on maritime attacks in the MENA region has documented more than 360 confirmed attacks on commercial vessels and warships across the Gulf, Strait of Hormuz, Gulf of Oman and Red Sea.⁵ The current conflict has transformed a persistent pattern into an acute crisis: in April 2026, IMO Secretary-General confirmed that there is “no safe transit anywhere in the Strait of Hormuz,” with around 20,000 seafarers stranded on approximately 1,600 vessels and unable to leave.⁶

The strategic logic is deliberate and highly efficient. Commercial shipping bottlenecks are targeted not through direct physical confrontation but by making transit feel sufficiently unsafe for owners and masters to reach that conclusion independently – achieving commercial closure at a fraction of the cost of sustained naval blockade. Joint guidance issued in May 2026 by the world's leading shipping associations confirmed that the Master retains overriding authority over transit decisions and that when risk increases, deferment of transit should be considered the safer option.⁷ The economic consequences follow automatically: vessels reroute, freight rates rise, supply chains lengthen and the cost of disruption compounds.

The same logic now applies in cyber and information security. A cyber intrusion into an energy control system or transport network can generate physical and financial consequences without direct kinetic exchange. GCC investment has already begun to reflect this, particularly through institutional development focused on operational technology environments in energy, water, transport and finance. The strategic implication is straightforward, cyber resilience and physical resilience can no longer be treated as separate portfolios.

Space now sits within that same resilience architecture. Satellite-enabled ISR, communications, spectrum access, Earth observation and resilient timing have become integral to trade continuity, maritime visibility,

infrastructure monitoring and compressed decision cycles. The next step for the GCC is therefore not prestige in orbit, but sovereign space resilience – the ability to protect, monitor and restore these functions under pressure. Continuity of effect is the design criterion, not ownership of every component. Sovereign space resilience therefore does not require end-to-end indigenous ownership of every orbital asset; it requires assured access, the ability to monitor and protect critical services and the capacity to restore function rapidly if disrupted. Building this through a combination of sovereign programs, commercial partnerships and allied agreements is both faster and more cost-effective than full indigenous development.

Case study

3

Qatar Space Radio Monitoring Center (SRMC): spectrum control as national resilience infrastructure

SRMC, inaugurated in October 2024, is one of 16 such facilities worldwide. In February 2025, Qatar's Communications Regulatory Authority (CRA) signed a Memorandum of Understanding (MoU) with the International Telecommunication Union (ITU) for spectrum assurance across geostationary and non-geostationary satellite systems. The Mobile Very Small Aperture Terminal (VSAT) geolocation capability is the first of its kind owned by any regulator globally. Spectrum assurance is national resilience infrastructure.⁸

Investment portfolio of Qatar spans spectrum assurance, advanced combat aviation, and sovereign space capability – a multi-domain approach that reflects the integrated resilience logic this paper advocates.

Case study

4

UAE GIQ platform and Arab satellite 813: from space data to decision advantage

In 2025, the UAE Space Agency launched the next-generation GIQ geospatial intelligence platform in partnership with Space42 and advanced the Arab Satellite 813 program – the first Arab hyperspectral Earth-observation satellite, advancing space capabilities across the Middle East region. Sovereign advantage requires not just data collection, but the fusion of collection, analytics and institutional access into a crisis-speed decision system. Deploying these capabilities commercially – providing geospatial intelligence and analytics services to private sector and regional clients – generates the revenue, talent pipeline, and operational learning that sustain sovereign space leadership over the long term.⁹

Beneath these capabilities lies the region's deepest structural question, human capital. The GCC has accumulated valuable operational experience, especially in logistics, force protection and sustainment. Across the GCC, building sovereign human capital pipelines in the most technically demanding disciplines – cyber

operations, autonomous systems, missile defense engineering, space systems – represents the longest-lead resilience investment. Progress to date, while encouraging, has not yet matched the pace of capability acquisition. This makes sovereign talent formation one of the most important long-term resilience issues.



3 Interoperability: the underappreciated strategic multiplier

Interoperability amplifies this foundation. Decades of cooperation with the US, the UK, France and among GCC members themselves have produced tangible operational infrastructure, including shared ISR arrangements, integrated air operations, and recurring exercises that compress decision time and expand surge capacity. That infrastructure has a clear physical presence – permanent allied installations, including the naval base of the UK in Bahrain, French facilities in Abu Dhabi, and the US Central Command air defense coordination cell at Al Udeid Air Base – as well as pre-positioned equipment and the habits of cooperation that allow partner support to mobilize quickly when it is needed. The strategic geography of Kuwait – bridging the

northern Gulf and hosting significant pre-positioned allied equipment – makes its contribution to GCC collective defense architecture uniquely important. Historical experience that Kuwait provided as the catalyst for the modern Gulf security architecture remains the clearest reminder of what collective defense, when it functions, can achieve. These relationships mattered immediately once the conflict in the Middle East intensified, partner support was available because infrastructure, access arrangements and habits of cooperation already existed.

However, the same situation has also shown the limit of the current model. The institutional layer required to translate strong political commitment and significant bilateral interoperability into dependable collective performance under simultaneous pressure – including shared command arrangements, pre-assigned contributions and integrated early warning – remains the priority development area for the GCC as a whole.

Case study

5

Bilateral exercises: from exercise cadence to operational readiness

Eagle Resolve, conducted biennially since 1999 under US Central Command auspices, has strengthened procedural interoperability across GCC states through multilateral consequence management and Chemical, Biological, Radiological and Nuclear (CBRN) exercises. Bilateral exercises – including Iron Union (US-UAE), Neon Defender (US-Bahrain) and equivalent formats across GCC member states – have further advanced tactical integration in the ways that complement the multilateral format of Eagle Resolve. Together, both formats play an important role. The conflict in the Middle East has underscored the value of these frameworks, reaffirming the importance of sustained exercise investment while highlighting opportunities to deepen integration further.¹⁰

4 The Strait of Hormuz: strategic economics, resilience priorities and mitigation pathways

This dynamic is particularly evident at the Strait of Hormuz, where the strategic foundation of the GCC converges with one of the region's most important resilience priorities. Hormuz is not only a maritime bottleneck – it is the critical economic artery of the region. A large share of global oil (roughly 25% of global seaborne oil trade) and LNG trade (about 20% of global seaborne LNG trade)¹¹ moves through a narrow channel, where disruption has the potential to alter energy prices, insurance conditions and investor confidence. One of the clearest lessons from the conflict in the Middle East is

that resilience planning must extend beyond full physical interdiction scenarios. Elevated threat disruption, mine risk, insurance withdrawal and vessel rerouting can create commercial disruption at significantly lower cost than a decisive naval confrontation.

The strategic geography of Oman is central to any credible Hormuz resilience architecture. The Musandam Peninsula controls the southern strait approaches, while Omani ports and airfields contribute valuable operational depth for logistics, dispersal and reconstitution operations that meaningfully strengthen the broader GCC framework. Participation of Oman – on terms consistent with a distinctive foreign policy posture and supported by credible military capability, including advanced combat aviation – best understood not as a peripheral consideration but a strategic enabler.

The GCC has built substantial capability. Heavy investment, effective partnership and the accumulation of genuine operational strengths are already evident. Yet capability alone is not the same as resilience under simultaneous, multi-domain pressure. The central challenge facing the GCC is not whether sufficient strength exists to deter. It is whether the strength can be converted into integrated, operate-through resilience.

Case study

6

Gulf tanker escort operations (1984-88) and IMSC (2019): operational precedents for Hormuz mitigation

During Operation Earnest Will (1987-1988), the US Navy escorted 188 re-flagged Kuwaiti tankers through contested Gulf waters without vessel loss. The International Maritime Security Construct (IMSC), established in 2019, provides the contemporary multinational escort framework. Both precedents confirm that choke point interdiction can be managed, but only through pre-positioned assets and command arrangements established before a crisis.¹²

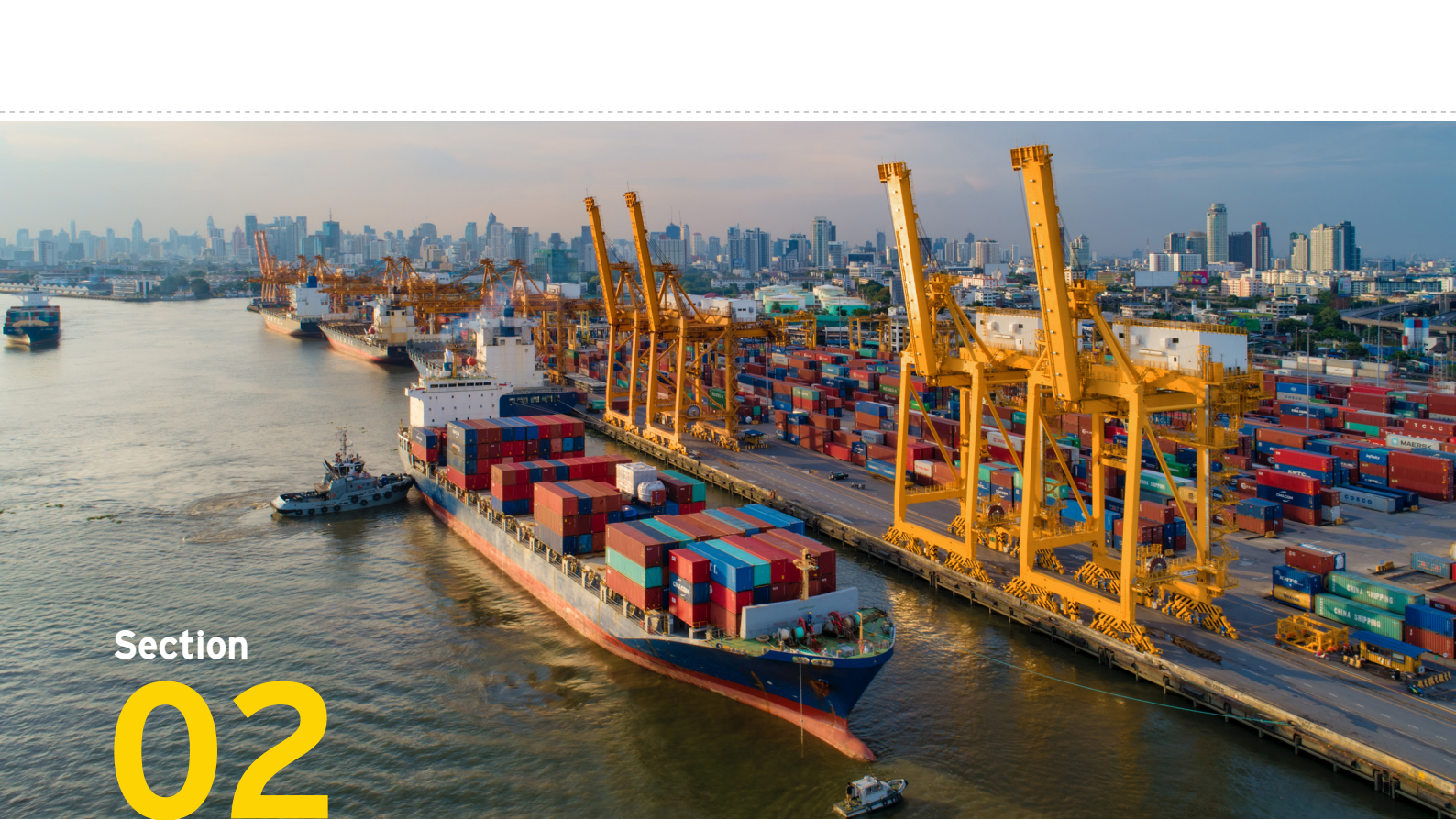
Case study

7

Red Sea 2023-25: active air defense under live salvo conditions

Between 2023 and 2025, sustained activity targeted commercial shipping in the Red Sea – including the first confirmed operational use of Anti-Ship Ballistic Missiles (ASBMs) against moving vessels. Allied naval vessels confirmed multiple intercepts. These intercepts included engagements by both US-family Patriot-class systems and Aster-family interceptors (incl. UK Sea Viper) – confirming that layered defense architecture across the GCC, drawing on both American and European capability, performed under live salvo conditions. The key finding is that commercial shipping disruption was driven primarily by threat posture rather than direct hits, confirming that economic disruption through threat is the most cost-efficient instrument available to regional adversaries.^{13, 14, 15}





Section

02

When the economy becomes the frontline

The conflict in the Middle East has clarified that the strategic objective of regional pressure is not conventional military escalation with the GCC. The strategic objective is to shape the risk calculus for investors, insurers, trade partners and allies. The aim is to create sustained economic and psychological pressure through multiple channels, while remaining, where possible, below the threshold that would automatically trigger external military response. In this model, resilience to disruption rather than the prospect of conquest, becomes the central strategic imperative.

1

The logic of system disruption

That logic works because the underlying cost structure is fundamentally asymmetric. Low-cost unmanned systems, cyber tools and maritime interference can trigger defensive responses whose financial burden is many times greater than the cost of the original action. A comparatively inexpensive system can prompt the deployment of high-value interceptors, continuous surveillance, logistics strain and an extended high-readiness posture.¹⁶ For investors and trading partners, the cumulative effect of energy volatility, supply chain uncertainty, elevated insurance costs and reputational caution may heighten the perceived impact of disruption in ways comparable with direct conflict, underscoring the value of mitigation, preparedness and market confidence measures.

2 The economic infrastructure is the center of gravity

The result is that the economic infrastructure of the GCC emerges as a central pillar of strategic resilience. Energy processing, desalination, ports, airports, logistics corridors, financial systems and data infrastructure are no longer peripheral to defense planning, they are at its core. The lesson reinforced from 2019 remains decisive: concentration of critical processing at a small number of nodes creates systemic exposures from localized disruption.¹⁷ The port infrastructure in the UAE – including one of the largest re-export hubs globally – stands as both a vital economic asset and an area where targeted resilience investment can deliver outsized value. A deliberate multi-hub port strategy, distributing transshipment and hardened logistics capacity across multiple nodes, offers a practical pathway to strengthen resilience while preserving trade facilitation advantage. The conflict in the Middle East has further clarified the importance of applying that lesson across the full economic operating system.

This operating system increasingly benefits from space-enabled and spectrum-dependent services that strengthen continuity and situational awareness. Satellite communications help sustain operational continuity. Navigation and timing systems support transport and segments of financial infrastructure. Earth-observation capabilities enhance maritime awareness and infrastructure monitoring. Ground-segment security, protected gateways and spectrum assurance are therefore central to sustaining service availability under pressure. Resilience therefore cannot be defined solely through physical hardening. It must also encompass the protection of the data, timing, communications and access layers that enable physical systems to operate in a coordinated and effective way.

3 The scale and simultaneity challenge

The geographic scale of the challenge makes it different from conventional conflict planning. The GCC is not defending a single front. It is defending a distributed economic system across six states, thousands of kilometers of coastline and border, and a dense concentration of high-value civilian and military nodes. The simultaneity of the first 48 hours of the conflict was not incidental. It was designed to test collective response mechanisms, compress decision cycles, and probe the alignment between political solidarity and operational integration.

This is where industrial depth becomes a defining resilience advantage. The strategic question is not simply whether frontline defenses can perform, but whether the system behind them can replenish at the pace required. If high-end defenses must repeatedly neutralize lower-cost threats, endurance becomes a function of supply chains, maintenance, stockpiles, domestic production, and acquisition speed. The strategic transition from import dependency toward sovereign replenishment depth is already underway across the GCC – and accelerating it, particularly in the highest-consumption categories, represents one of the clearest near-term opportunities to strengthen resilience. GCC states have developed a strong portfolio of advanced precision capabilities – including long-range systems – reflecting the strength and maturity of existing defense industrial partnerships and their role in enabling sustained capability development. Sovereign industrial depth in this context means ensuring replenishment capacity and progressive localization of components, building on a strong foundation of existing operational capabilities and partners.

Case study

Interceptor economics: the industrial depth imperative

8

A leading terminal-phase interceptor in GCC layered defense architectures costs approximately US\$4m to US\$6m per unit, while the cost required to neutralize threat system is orders of magnitude lower. Production data through 2025 (based on open source defense analysis) shows sustained demand growth that is placing pressure on global manufacturing capacity. Import dependency on interceptors is a strategic exposure: external actors can target inventory priorities of partner nations to limit GCC supply.^{18, 19}

The economic exchange rate between high-value interceptors and low-cost threat systems is a structural feature of the current conflict environment – one that reinforces the importance of expanding interceptor production capacity, faster replenishment logistics and layered defeat mechanisms that reduce reliance on any single intercept solution. It is ultimately a case for industrial depth and system-wide resilience, underscoring the strategic imperative of complementing high-performance systems with broader intercept solutions and deeper sustainment capacity.

4 Strengths demonstrated under operational pressure

At the same time, the shift in geopolitics has also highlighted important strengths across the system. Air defense performance under sustained pressure has confirmed the value of a decade of layered investment. Trade and port continuity, though strained, has largely remained intact through adaptation and external partnership. Alliance cohesion has continued to demonstrate credibility. These are strategic assets. The strongest reform agendas are those that build on proven strengths while continuing to strengthen resilience over time.

5 Six structural gaps the situation has exposed

The tension has, however, exposed six structural gaps with particular clarity. Structural gaps are:

- 1 **Basing concentration** | Critical air power and logistics remain concentrated in a limited number of locations.
- 2 **Contested logistics** | Supply chains for interceptors, munitions, spares, fuel and repairs have not been designed for prolonged disruption.
- 3 **Cross-domain integration** | Air, maritime, cyber and space awareness remain only partially fused.
- 4 **Industrial depth** | Dependence on imported high-consumption items creates vulnerability.
- 5 **Resilience by design** | Significant portions of critical economic infrastructure were built for efficiency and scale rather than continuity under pressure.
- 6 **Space continuity and spectrum assurance** | Dependence has expanded faster than sovereign capacity to monitor interference, protect gateways, assure fallback and restore lost services.



Section 03

Five levers and time horizons

To overcome the identified structural gaps, five key levers have been identified as a priority of GCC countries:

01

Integrated threat architecture

Threat architecture that senses the threats and shortens decision cycles.

02

Operational resilience

Operational resilience keeps bases, infrastructure and supply chains functioning in adverse conditions.

03

Sovereign industrial depth

Sovereign industrial depth that converts spending into sovereign depth, replenishment power and design authority.

04

Coalition integration

Coalition integration that turns partnerships into usable operational mass.

05

Resilience governance

Resilience governance that aligns budget, authority and execution so the other four levers can move at operational speed.

The five levers are not separate initiatives. They function as a single operating system for GCC resilience. Their purpose is to help the region absorb disruption, sustain operations, recover quickly and preserve economic, and political freedom of action under prolonged pressure. Resilience is no longer a defensive afterthought. It is an active competitive strategy.

These levers must also be sequenced across time. In the first horizon, the priority is to stabilize the system: protect the most critical nodes, preserve decision speed, secure minimum viable logistics continuity,

reassure markets and partners and buy time without strategic drift. In the second horizon, the priority is to build recoverability by institutionalizing playbooks, expand redundancy, deepen industrial and coalition mechanisms, and reduce the cost of sustained pressure through repeatable operating models. In the third, the objective is enduring resilience: embed operate-through design, sovereign replenishment depth, integrated coalition architecture and portfolio governance into routine national planning.

The pace and modality of implementation of the five levers will necessarily reflect each member state domestic political architecture, resource base and strategic posture. The framework is designed to be scalable – states with larger defense budgets and more centralized decision authority can move faster on sovereign industrial depth, while all members can progress on threat architecture and coalition integration regardless of size.

For smaller GCC members, the sovereign industrial depth and governance levers are best pursued through pooled GCC mechanisms – joint procurement, shared MRO facilities and collectively governed training infrastructure – rather than individually replicated national programs. The collective architecture is more cost-effective and more resilient than six parallel national systems.

Lever

01

Integrated threat architecture

Resilience begins with visibility. Without a shared and continuously updated understanding of the potential threats across domains, every other investment risks acting too late, in isolation, or against the wrong priority. The GCC therefore requires an integrated threat architecture that combines kinetic warning, cyber signals, logistics exposures, infrastructure exposure, maritime indicators and adversary decision logic into a single actionable picture across government and private sectors. The value of this lever is not collection alone, but translation into decisions. It should support planning across several plausible conditions and organize responses around three modes: prevent, reduce consequences and recover fast. This lever produces little visible capability by itself, but it multiplies the value of all four levers that follow.

Lever

02

Operational resilience

If Lever 1 is about seeing, Lever 2 is about continuing to function. The conflict in the Middle East has shown that the highest-consequence near-term vulnerability lies in critical infrastructure designed primarily to recover after disruption rather than to continue during it. The strategic requirement is therefore to eliminate single points of failure through dispersion, redundancy, hardening and continuity-by-design across both military and economic systems. This means moving from a small number of highly concentrated nodes toward a wider network of survivable operating locations, alternate logistics routes, hardened infrastructure and rehearsed continuity procedures. The principle is simple: resilience should not begin only after disruption. It should be embedded into the system before pressure rises.

Case study

9

Agile combat employment (ACE): the dispersal blueprint

Developed by the US Air Force for the Indo-Pacific, ACE deliberately disperses air power across smaller locations to complicate adversary targeting and sustain operations under pressure. Core elements include:

- Pre-negotiated access and posture
- Mission command with forward autonomy
- Rapid movement between spokes
- Hardening and redundancy
- Logistics under disruption

ACE principles – dispersal, pre-positioned sustainment and rehearsed rapid turnaround – provide the conceptual foundation for a GCC-adapted approach. The specific implementation will require significant groundwork: host-nation support negotiations, infrastructure assessment, pre-positioning agreements and sustained investment in exercises before spoke locations become operationally credible alternatives to primary bases.²⁰

Case study

10

RAND 2026: sortie generation proficiency as organizational system

RAND Corporation 2026 analysis of combat sortie generation proficiency establishes that sustained sortie generation performance depends not only on platform capability, but on the rigour of training fidelity, standardized procedures and system design across the maintenance and logistics pipeline. For GCC air forces operating through dispersed locations under degraded supply chains, pre-rehearsed procedures and well-trained personnel – including personnel cross-trained across multiple maintenance disciplines – provide the essential foundation for operational continuity under ACE conditions. Simulation-based rehearsal, including digital twins of basing operations, can extend this foundation by enabling practice at scale without consuming the scarce aircraft and flight hours that constrain conventional training.²¹

Lever 03

Sovereign industrial depth

Operational resilience protects continuity – sovereign industrial depth protects endurance. The dependence of the GCC on imported interceptors, defeat systems, precision munitions, spares and other high-consumption items is simultaneously an operational vulnerability, a supply chain risk and a missed economic opportunity. In a prolonged contest, the capacity to replenish becomes as important as the capacity to respond. While significant progress has been made – through local assembly, subcontract manufacturing and co-production arrangements across multiple programs – the transition of the GCC from import dependency to genuine sovereign industrial depth in the most operationally critical segments remains the priority investment of this decade.

The economic case aligns with the security case:

Every defense dollar that recirculates through a domestic supply chain contributes to industrial capacity, technical skill, GDP and employment. The goal is not political but rather control over continuity: local production, maintenance, co-production, design authority and crisis-speed adaptation in the capability segments most exposed to sustained demand.

The Saudi British Defense Cooperation Program:

Spanning six decades, encompassing combat aviation, training systems and in-Kingdom support operations with thousands of locally employed staff – represents the most mature example of the co-production and knowledge-transfer model this lever advocates.

The development of sovereign supply chains for critical defense materials, including rare earth elements (REEs) and semiconductor materials essential for advanced radar and electronic warfare systems, represents a strategic opportunity to deepen industrial resilience while complementing platform co-production. Partnerships that establish in-country production of these materials strengthen resilience at the component level as well as system level. The MoU between the Tawazun Council, RTX and Emirates Global Aluminum to develop in-country gallium production – a critical input to the semiconductors and gallium nitride components used in advanced radar and electronic warfare systems – is a concrete example of this model in practice: a co-production arrangement that builds sovereign materials depth within an established industrial partnership rather than as a substitute for one. Industrial depth addresses

what the GCC can produce.²² The complementary question is how quickly that production capacity can be mobilized when it is required – which requires an acquisition architecture designed to support operational speed as well as governance discipline. Rapid capability sourcing is the mechanism that closes this gap: the structured governance discipline through which leaders make deliberate, time-bounded capability decisions under operational pressure, accepting calibrated trade-offs between performance, cost and time – to deliver required capability with speed, precision and mission focus.

Case study

11

Digital engineering at operational scale: the unmanned systems precedent

Boeing Australia's MQ-28 Ghost Bat program had accumulated more than 20,000 hours of digital testing against approximately 150 hours of physical flight test by September 2025 – a ratio of more than 130:1 – with Capability Demonstration 2025 completed four months ahead of schedule. The program demonstrates how a digital-first development methodology can accelerate capability delivery and enhance development efficiency – combining digital twins, hardware-in-the-loop simulation and model-based systems engineering to compress timelines and deliver operationally relevant capability ahead of schedule. The digital engineering model demonstrated in programs such as MQ-28 offers a highly relevant pathway for GCC sovereign development programs – not through replication of specific platforms, but through adoption of the underlying methodology to strengthen speed, adaptability and program execution.²³

Case study

12

VICTUS NOX and VICTUS DIEM: responsive space as an operational discipline

The VICTUS NOX and VICTUS DIEM exercises (conducted by the US Space Force and Space Systems Command between 2024 and 2026) demonstrated end-to-end responsive space reconstitution with launch on extremely short notice. In March 2026, Space Systems Command formalized rapid launch tactics and techniques for urgent national security demands. The operational principle for the GCC is to restore critical space-enabled functions before opponents can convert temporary orbital loss into strategic advantage. The model is adoption of the principle, not replication of the US program.²⁴

Lever

04

Coalition integration

No GCC state can build full resilience alone. Alliance relationships therefore remain indispensable. Yet the conflict in the Middle East has also clarified an important opportunity: formal partnerships are sometimes more advanced in declaration than in operational performance. Partner support – delivered with speed and effectiveness reflecting decades of relationship investment – has been essential. The priority now is to build on that demonstrated bilateral responsiveness by embedding it in standing coalition architecture: pre-integrated, pre-authorized and pre-rehearsed so that response in the future is faster and requires less real-time adaptation. This means shared early-warning feeds, coordinated engagement authority, pre-assigned national contributions to a combined response and standing arrangements for host-nation support and joint command during crisis – agreed in advance to strengthen readiness under pressure. It also requires a diversified model that broadens resilience by reducing concentrated dependency on any single partner.

The institutional foundation for this architecture is already firmly in place. The Combined Maritime Forces (CMF), headquartered in Manama, stands as the most mature institutional expression of the coalition integration architecture that this lever can extend across

all domains. The role of Bahrain as host nation for both US Fifth Fleet and CMF headquarters provides a strong command infrastructure and procedural precedent around which a more deeply integrated GCC-wide resilience architecture – covering air, maritime, cyber and logistics domains – can continue to be built. The task is not to create new institutions from scratch but to deepen, extend and more formally anchor what is already functioning effectively.

Case study

13

NATO Baltic air policing: collective coverage as operational reality

Since 2004, NATO's Baltic Air Policing mission has rotated fighter aircraft from member nations through bases in Estonia, Latvia and Lithuania to provide continuous air sovereignty patrols. The Baltic Air Policing model – along with comparable European and bilateral frameworks for collective air patrol and maritime security – demonstrates that rotating coverage commitments, shared C2 architecture, and standardized host-nation support can convert individual capability gaps into collective strength. For the GCC, a directly analogous GCC Air Resilience Compact – structured around voluntary participation, graduated commitment levels and sovereignty-preserving arrangements – could provide collective coverage that individual members opt into based on national security posture, without requiring uniform commitments from states with differentiated diplomatic profiles.²⁵

Lever 05

Resilience governance

The first four levers define what must be built. The fifth determines whether any can be delivered at the necessary speed and coherence. Resilience is strongest when it is coordinated across ministries, elevated as a national priority and supported by acquisition logic designed for timely delivery. Governance is therefore not a supporting function. It is the central mechanism that aligns authority, budget, accountability and private sector coordination behind a shared resilience agenda. The institutional response proposed here is the establishment of a dedicated resilience authority – cross-ministerial in mandate, supported by genuine budget authority, and accountable for managing resilience as a strategic portfolio rather than a series of disconnected reactions. In the current environment, economic stability and investor confidence are not adjacent to national security. They are direct expressions of it.

Acquisition reform is a key enabler of resilience. The capability development of the GCC and acquisition system must be sufficiently agile to deliver capabilities when and where they are needed, through three distinct pathways: collaborative capability development (CCD), rapid capability sourcing (RCS) and urgent operational requirement (UOR). CCD balances time, cost and performance for planned capability; RCS deliberately trades performance for speed when the

timeline demands it; UOR accepts cost and performance compromise when operational urgency is genuine and documented.

Taken together, these five levers form a single, integrated architecture. Threat architecture sharpens priorities. Operational resilience preserves continuity. Industrial depth sustains endurance. Coalition integration adds mass, redundancy and credibility. Governance provides speed and coherence. Their strategic value lies in their interaction. If pursued together, they reduce vulnerability, preserve market confidence and increase the GCC's freedom of action under pressure. Pursued as an integrated agenda, they create a stronger and more durable resilience posture across the GCC.



Conclusion

The conflict in the Middle East has provided a level of strategic clarity that few planning exercises could achieve. It has translated theoretical exposure into actionable insight and theoretical strength into demonstrated performance. It has shown that layered air defense can function under sustained pressure, that trade continuity can be preserved despite maritime strain, and that alliance relationships can remain credible under severe pressure. It has also shown, with equal clarity, that resilience depends not only on capability depth, but on how effectively that depth is integrated, distributed and sustained.

Basing concentration, contested logistics, incomplete cross-domain integration, industrial dependency, infrastructure not designed for operate-through continuity and a still-maturing space resilience layer all remain important strategic priorities for continued strengthening.

That is why resilience must now serve as the organizing principle of GCC defense and security policy. The five levers in this paper are not separate reforms. They are a reinforcing architecture for preserving continuity, reducing the cost of prolonged pressure, and sustaining strategic credibility. The central decision facing GCC states is no longer whether they can deter sustained disruption. It is whether they can remain operational, investable and strategically reliable while continuing to perform under sustained pressure. Those that make this transition will be well positioned to strengthen alliance relationships, deepen domestic industrial capacity, reinforce investor confidence and expand freedom of action. The alternative – managing these challenges state by state, without the compounding advantage of collective architecture – is both more costly and less effective than the integrated approach this paper proposes. The GCC has already built the capacity to fight. The next strategic task is to build the capacity to endure and adapt. In this environment, resilience is not simply a cost, it is one of the most valuable strategic investments available.



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