

THE MENA WEEKLY



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Key Takeaways

- Iran – US/Iran peace talks in Pakistan collapse – **SEVERE**
- Iran – US military blockade comes into effect – **SEVERE**
- Israel/Lebanon – Israel escalates strikes on Lebanon as Hezbollah rejects talks – **SEVERE**
- Saudi Arabia/Iran – Iranian strikes target Saudi oil and gas infrastructure – **SEVERE**

Iran — US/Iran peace talks in Pakistan collapse — SEVERE

Situation Update

On 12 April 2026, United States (US) Vice President JD Vance stated that 21 hours of peace talks between the US and Iran in Islamabad had [failed](#) to produce an agreement to end the war. Mediated by Pakistan, the negotiating session was the highest-level face-to-face encounter between US and Iranian officials since Iran’s 1979 Islamic Revolution. Vance was joined by Special Envoy Steve Witkoff and US President Donald Trump’s son-in-law, Jared Kushner. The Iranian delegation included Foreign Minister Abbas Araghchi and the speaker of Iran’s Parliament, Mohammad Bagher Ghalibaf.

Key areas of discussion included the Strait of Hormuz, Tehran’s nuclear programme, war reparations, the lifting of sanctions, and an end to the various conflicts in the Middle East. While Israel was not involved in the talks, the Israeli Defence Forces (IDF) have not struck Iran since the ceasefire was reached, although they have continued to strike targets in Lebanon. Despite the talks failing to produce a diplomatic breakthrough, the fact that the speaker of Iran’s Parliament met with Vance remains extraordinary, given the long history of animosity between the two nations.

Assessment/Impact/Business Implications

The collapse of the negotiations suggests that the two parties remain far apart on a number of issues. For a peace agreement to be achieved, it is important that both sides can save face from whatever deal emerges. On 14 April 2026, Trump [suggested](#) that talks aimed at ending the war in Iran could resume this week. One day later, Pakistan’s army chief [arrived](#) for talks in Tehran on the possibility of a new round of negotiations. Although with Washington [imposing](#) a naval blockade on Iran, doubts have grown over the prospects for a two-week ceasefire that is due to expire next week. More than a dozen US warships and some 10,000 US military personnel are now enforcing the blockade against vessels of any country entering or leaving Iranian ports, starving Iran of a vital economic lifeline. Nevertheless, at the time of writing, efforts to revive negotiations appear to be gathering pace, with reports [suggesting](#) that the two sides have been in indirect talks aimed at extending the two-week ceasefire beyond its expiry on 22 April 2026. Much hinges on whether a diplomatic pathway can be discovered. Failure risks a resumption in fighting that could lead to further infrastructural damage across the region, another spike in fuel prices, as well as mass displacement and casualties, among other consequences.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	SEVERE
Economic	SEVERE	Conflict	HIGH
Civil Unrest	HIGH	Environment	MODERATE
Crime	MODERATE	Legal	HIGH

Iran — US military blockade comes into effect — SEVERE

Situation Update

On 14 April 2026, the United States (US) began enforcing its blockade on vessels calling at Iranian ports. The move was announced by US President Donald Trump after weekend peace talks in Islamabad between the US and Iran failed to produce a deal. Reports on the first day of the blockade [suggested](#) that it had made little difference to traffic through the Strait of Hormuz, with at least eight ships, including three Iran-linked tankers, crossing the waterway. However, on 15 April 2026, the US military [announced](#) that it had “fully implemented” its blockade and that economic trade entering and leaving Iran by sea had been “completely halted”.

In retaliation, Iran’s military has [warned](#) that it will block trade through the Red Sea, along with the Gulf and Sea of Oman, if the US naval blockade continues. Such a move is likely to involve the Iran-backed Houthis in Yemen. Despite refraining from entering the war during the first month of the conflict, the Houthis entered the war on 28 March 2026, [launching](#) a barrage of ballistic missiles at Israel. The group have launched several attacks on Israeli targets, fuelling concerns that they could move to close off the Bab el-Mandeb Strait. According to US Central Command (CENTCOM), nine vessels have complied with the direction from US forces to turn around and return toward an Iranian port or coastal area.

Assessment/Impact/Business Implications

The decision to implement a blockade is illustrative of the extent of the risks associated with the alternative options available to US forces. For instance, attempting to force back the Iranians, seize Kharg Island, and/or escort military convoys through the Strait of Hormuz could have proven costly. With US forces having to expose themselves to Iranian missiles, drones, fast boats, and sea mines, the potential for Iran to inflict a significant blow would increase. With the American population’s lack of appetite for the conflict reflected by recent polls, any event that causes a large loss of US lives could prove strategically fatal. By contrast, a blockade allows US warships to loiter safely far offshore in the waters of the Gulf of Oman, track vessels emerging from Iranian ports, and interdict them at will.

Since the war began, Iran has successfully continued to export its petrochemicals through the Gulf, earning billions of dollars while preventing other Gulf countries from exporting their own hydrocarbons. A successful US blockade could halt that flow, depleting Tehran of the revenue it depends on at a time when the economy is suffering from a plethora of challenges. This could pressure Iran to make greater concessions at the negotiating table. However, with Tehran showing resilience in the face of widespread US-Israeli strikes, they may well feel prepared to weather another storm. With economic pressures stemming from the Strait of Hormuz crisis and domestic political considerations with midterm elections scheduled for November 2026, it is unlikely that Washington is prepared to prolong the conflict in the mid-long term. As such, Iran may feel that time is on its side.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	SEVERE
Economic	SEVERE	Conflict	HIGH
Civil Unrest	HIGH	Environment	MODERATE
Crime	MODERATE	Legal	HIGH

Israel/Lebanon — Israel escalates strikes on Lebanon as Hezbollah rejects talks — SEVERE

Situation Update

Israel has intensified its military campaign in Lebanon at the same time as diplomatic efforts have opened a rare channel for direct talks between Lebanese and Israeli officials, creating a highly unstable mix of negotiation and escalation. Fresh [strikes](#) hit southern Lebanon a day after the two sides held talks in Washington, with attacks reported around Tyre and other southern areas. The renewed operations followed what had already become the heaviest wave of Israeli attacks in Lebanon since the conflict sharply escalated in March 2026, with recent fighting leaving more than 2,000 people dead and over one million displaced.

The diplomatic track is historically notable. The Washington meeting marked the first direct engagement between Lebanese and Israeli representatives in decades and was framed by both sides as part of an effort to stabilise the border and reduce Hezbollah’s influence. However, Hezbollah has made it clear that it rejects both the political logic and any possible outcome of that process. Senior Hezbollah figures said the movement would not recognise or abide by agreements emerging from the talks, while also rejecting direct negotiations with Israel and insisting that any

meaningful process must begin with a ceasefire, Israel’s withdrawal from Lebanese territory, and the return of displaced people.

The situation highlights Lebanon’s deep internal divisions. Some officials and factions see direct talks as a possible route to reduce hostilities and strengthen the Lebanese state. Others, particularly Hezbollah and its allies, see them as politically illegitimate and strategically dangerous. The split matters because it means diplomacy is unfolding without national consensus and under conditions of continued military pressure, making implementation of any future arrangement extremely difficult. Coverage of the reactions inside Lebanon has underscored that the country remains deeply divided over Hezbollah’s role, disarmament, and the broader question of whether direct engagement with Israel is acceptable.

Assessment/Impact/Business Implications

For businesses, the key issue is that direct diplomacy has not reduced operational risk on the ground. The continuation of Israeli strikes alongside Hezbollah’s refusal to accept the talks means the security environment in Lebanon remains severely unstable. Any expectation that political engagement would quickly produce a de-escalation now appears premature. Continued strikes, displacement, infrastructure damage, and the possibility of renewed Hezbollah attacks all point to a prolonged crisis rather than a controlled transition to ceasefire conditions.

The implications are serious for logistics, construction, telecommunications, aid delivery, energy infrastructure, and any business with staff or assets in Lebanon. The broader regional business environment is also affected because the conflict remains tied to wider questions of Iranian influence, Israeli military strategy, and US-backed diplomacy. The overall risk is severe because Lebanon is now facing a simultaneous military escalation and political fragmentation, with no clear indication that either the talks or the violence will decisively prevail in the near term.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	SEVERE
Economic	SEVERE	Conflict	SEVERE
Civil Unrest	HIGH	Environment	HIGH
Crime	MODERATE	Legal	HIGH

Kuwait — Journalist detained over Iran war social media posts — HIGH

Situation Update

Kuwait’s detention of journalist Ahmed Shihab-Eldin over social media posts related to the Iran war has drawn sharp criticism from press freedom advocates and raised renewed concerns about the tightening boundaries of public expression in the Gulf during wartime. Shihab-Eldin, a Kuwaiti-American journalist, is reported to have been detained after sharing [videos](#) and commentary linked to the conflict, including imagery connected to aircraft incidents over Kuwait. Advocacy groups say he has been in custody for several weeks and may face accusations linked to spreading false information, harming national security, or misusing communications devices, although public clarity over the exact charges remains limited.

The case is significant because it appears to sit at the intersection of wartime censorship, national security legislation, and broader efforts by Gulf states to control information during a period of regional instability. Although Kuwait has sought to maintain a careful posture during the Iran war, it has also tightened restrictions regarding the discussion of military incidents, missile strikes, and other sensitive wartime developments. Human rights groups and campaigners argue that detaining a journalist for circulating publicly available material sends a worrying message to reporters and the wider public.

The broader context matters. Kuwait has long had a more active parliamentary and media culture than some neighbouring states, but that openness has always existed within clear political and legal limits. In the current regional environment, these limits appear to be narrowing further. The detention raises questions about whether temporary emergency controls are becoming a more durable model for information management, particularly as Gulf governments seek to contain public anxiety and prevent scrutiny of sensitive defence-related events.

Assessment/Impact/Business Implications

For businesses, the immediate commercial impact is limited, but the case is important because it signals a more restrictive information and legal environment during crises. Media organisations, consultancies, foreign correspondents, digital platforms, and firms relying on open-source information should assume greater scrutiny around wartime commentary, imagery, and online analysis. The detention also highlights legal and reputational risks for staff operating in Kuwait if their work touches politically sensitive or security-related material, even when that content is already in circulation elsewhere.

The overall risk is high rather than severe because Kuwait remains institutionally stable. However, the case does point to a harder official stance on speech during wartime and to the possibility of additional detentions, prosecutions, or self-censorship if the regional conflict continues. For international organisations, the main implication is that legal exposure and information-control risks in Kuwait are rising, particularly for journalism, analysis, advocacy, and politically sensitive communications work.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	LOW	Environment	LOW
Crime	LOW	Legal	HIGH

Algeria — Pope’s visit to Algeria marked by bomb attack — HIGH

Situation Update

On 13 April 2026, Pope Leo XIV’s first visit to Algeria was disturbed by a terror [attack](#) in the city of Blida, 45km south of Algiers. Two suicide bombers conducted an attack at around 1200hrs (local) in the city outside a police station. Bomb alerts were reported throughout the city following the attack, which was stopped by local police and a special response unit. There were no reported casualties, apart from the two bombers.

The Pope was visiting Algiers’ Grand Mosque, the largest in Africa. During the visit, he was accompanied by the mosque’s rector as well as the Archbishop of Algiers. His visit was also marked by a meeting with Algerian President Abdelmajid Tebboune at the Presidential Palace, where he gave several speeches on peace and unity. He also stopped by Algier’s Martyrs Memorial on the victims of the Algerian War of Independence, speaking on forgiveness. Following his trip to Algiers, he travelled to the city of Annaba, the hometown of his spiritual master St Augustine of Hippo.

Assessment/Impact/Business Implications

Algeria was the Pope’s first stop on his African tour, which comes after he was [criticised](#) by United States President Donald Trump for speaking out against the war with Iran. The rest of the itinerary includes Cameroon, Angola, and Equatorial Guinea, making it his second major foreign trip since his inauguration in 2025. He is using the tour as an opportunity to urge leaders to avoid corruption and fight for peace and unity.

The attempted terror attack has, so far, not affected the Pope’s trip. However, fears are growing that his upcoming visit to Cameroon may be susceptible to similar security risks. A separatist alliance in the country has stated it will observe a three-day [ceasefire](#), allowing a “safe travel passage” for civilians and visitors to move freely during his visit. On 15 April 2026, Leo addressed the conflict in northern Cameroon, citing the clashes with Nigeria-based militant groups. A mass in the coastal city of Douala, which is expected to gather around 600,000 people on 17 April 2026, is set to be a particularly vulnerable event. These extensive criticisms and the prospects of big, dense crowds in countries marked by conflict and instability may elevate security risks, especially after the unsuccessful terror attack in Algeria. While the African nations hosting the pope are likely to boost security measures, it remains unclear how effective these will be.

Factor	Risk Rating	Factor	Risk Rating
Political	MODERATE	Business	MODERATE
Economic	LOW	Conflict	HIGH
Civil Unrest	HIGH	Environment	MODERATE
Crime	HIGH	Legal	MODERATE

Saudi Arabia/Iran — Iranian strikes target Saudi oil and gas infrastructure — SEVERE

Situation Update

Saudi Arabia has reportedly been forced to [pause](#) activities at several energy production facilities as a result of continued strikes on its territory. On 09 April 2026, reports indicated that Iranian attacks on Saudi Arabia’s energy infrastructure had forced Riyadh to cut national oil production, which dropped by 600,000 bpd, roughly 10% of its typical crude exports. In particular, the East-West Pipeline saw a decrease of approximately 700,000 bpd after strikes attacked the infrastructure. The renewed strikes came just hours after the announcement of a ceasefire between Tehran and Washington. Oil buyers were initially optimistic about the pricing and accessibility of energy following the agreement announcement. However, Iran’s continued strikes have sown doubt within the international community regarding the longevity of the ceasefire agreement.

Assessment/Impact/Business Implications

The strikes on Saudi oil and gas infrastructure, transport, and refining reveal the country’s [vulnerability](#). The effective pause, from national oil and gas production to refining and export channels, showcases the country’s exposure to Iranian attacks. It demonstrates that a full-scale resumption of the conflict, if a diplomatic avenue cannot be found, would severely affect Saudi Arabia. For Iran, the strikes could be interpreted in two different ways: either as a failure of the Iranian command, as unsanctioned actions conducted by rogue individuals within the IRGC, or as a strategic move to cut off Saudi Arabia’s main alternative method to using the Strait of Hormuz, the East-West Pipeline.

Saudi Arabia’s oil sector is likely to continue to be marked by extreme geopolitical volatility and infrastructure damage. The strikes have caused severe supply chain disruptions and hindered the government’s diversification goals. Some production, refining, and export companies remain strong, maintaining relatively stable production capacities. The impact of the attacks also goes beyond physical infrastructure. According to the ministry source, the disrupted supply chain has already led to a significant drop in the Kingdom’s operational and emergency [inventories](#), reducing the country’s capability to offset supply disruptions in the future. As the world’s largest oil exporter, the disruptions may tighten global supply and energy security, as well as increase price volatility, delaying the recovery.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	SEVERE
Economic	SEVERE	Conflict	SEVERE
Civil Unrest	MODERATE	Environment	HIGH
Crime	MODERATE	Legal	HIGH

Libya — Rival forces participate in US-led exercises — HIGH

Situation Update

On 14 April 2026, in the city of Sirte, forces aligned with Libya’s eastern and western administrations participated in a joint military exercise as part of the US Africa Command (AFRICOM)-led “[Flintlock](#)” special operations drills. The exercise involved the Libyan National Army (LNA), based in Benghazi, and the Government of National Unity (GNU), based in Tripoli, alongside more than 30 countries, including Italy, which has actively supported efforts to develop a unified Libyan military. The activities included land, air, and maritime operations. The initiative provided a framework for operational coordination between LNA and GNU forces within the context of the multinational exercise.

In parallel, the two sides initiated consultations on the coordination of the country’s annual oil revenues and the potential [establishment](#) of a unified national budget. These discussions are taking place within the broader context of engagement with the United Nations (UN) mission, focusing on financial governance and oversight mechanisms. They also address the potential unification of Libya’s financial administration and the phasing out of parallel revenue management systems.

Assessment/Impact/Business Implications

Recent developments in military and political-economic cooperation between the LNA and GNU represent positive signals for Libya’s internal stability and institutional framework. From previously opposing factions during the 2014 civil war, current instances of collaboration suggest a potential, gradual increase in willingness to coordinate between the parties. This dynamic is also reflected in statements by Saddam Haftar, Deputy Commander of the LNA’s General Command, who noted that the operation “reaffirms Libya’s position as a reliable partner in supporting regional and international peace and security.” Despite this more cooperative posture, any prospect of national unification remains premature and highly uncertain.

In this context, the political and economic situation continues to be characterised by fragility and fragmentation, requiring extended timeframes for trust-building between the parties. The failure to initiate the presidential and parliamentary [elections](#), announced by the High National Elections Commission (HNEC) for mid-April 2026, further reinforces this assessment, highlighting the absence of a shared political roadmap capable of supporting the development of common institutions and reducing divisions. Despite signs of coordination, the security environment remains volatile. The [attack](#) that occurred on 14 April 2026 in the Kufra desert between the Subul al-Salam Brigade and tobacco smuggling groups highlights the persistence of localised violence outside formal cooperation channels, underscoring the limits of central control over the territory.

For businesses, Libya continues to represent both an opportunity and a structural risk. Oil production, efforts to increase gas exports, and discussions on revenue management may support medium-term stabilisation. However, the absence of unified governance mechanisms exposes the sector to recurring political and security disruptions. Overall, the risk remains high because Libya is not entering a phase of full stabilisation, but rather a phase of managed fragmentation, in which forms of cooperation may emerge in specific areas without resolving the structural drivers of instability.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	HIGH	Environment	MODERATE
Crime	HIGH	Legal	HIGH

Morocco – Agreement for US\$25 billion Nigeria–Morocco gas pipeline reached – HIGH

Situation Update

On 13 April 2026, the Director General of the National Office of Hydrocarbons & Mines (ONHYM) of Morocco, Amina Benkhadra, [stated](#) that the signing of an intergovernmental agreement on the Nigeria–Morocco gas pipeline is expected within the year. The project, known as the African Atlantic Gas Pipeline and agreed approximately a decade ago, is the result of an agreement between the Nigerian National Petroleum Corporation (NNPC) and ONHYM. With a length of 6,900km, an annual capacity of 30 billion cubic metres (bcm), and an estimated cost of US\$25 billion, the hybrid offshore and onshore route of the pipeline aims to transport natural gas from Nigeria to Morocco through 13 West African countries. The project also has a transcontinental dimension, as 15bcm are intended for meeting Morocco’s domestic needs and exporting to Europe.

The project structure is not based on a single investment block, but rather on a phased approach. The initial segments will connect Morocco to gas fields in Mauritania and Senegal, as well as Ghana to the Ivory Coast, and Ghana to Nigeria’s gas fields. Each segment is designed to operate as an autonomous system, enabling early economic value generation. The entire project will, however, be supervised by a joint venture between ONHYM and NNPC, with ministerial representatives from each participating country.

Assessment/Impact/Business Implications

The project represents a critical milestone as a potential strategic shift for the West Africa–North Africa–Europe energy axis. Nigeria, thanks to its vast natural gas reserves, is strengthening its capacity to monetise its resources, while Morocco is set to better meet its own energy needs, and Europe can diversify its supply corridors. The initiative is embedded in a long-term framework of [cooperation](#) between Morocco and Nigeria, characterised by extensive collaboration not only in the energy sector, but also in agriculture, transport, and regional economic integration. From a business perspective, the project generates significant opportunities for EPC (Engineering, Procurement and Construction) contractors, as well as for local suppliers, particularly in logistics, engineering, and operational support services.

The transnational nature of the project introduces a high exposure to structural risks related to political, regulatory, and security complexity along the infrastructure corridor. The multi-state governance framework, involving 13 countries, entails significant differences in national regulatory systems, with heterogeneous permitting and contracting procedures, as well as non-uniform approval timelines. The initiative is also highly dependent on international financial support and large-scale investment, a critical factor for its implementation. From a [security](#) perspective, several countries along the corridor—particularly in the Sahel and West Africa region—are exposed to a high level of risk related to corruption, armed insurgency, terrorist activity, and widespread instability. Morocco presents a relatively stable environment, albeit with occasional social tensions. Finally, the environmental dimension represents an additional risk factor, considering the crossing of diverse ecosystems and the presence of both onshore and offshore segments, with potential regulatory and operational challenges.



**Global Situational
Awareness**

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	MODERATE	Environment	HIGH
Crime	HIGH	Legal	HIGH

Global SA Risk Methodology

THREAT LEVEL RATING	
SCORE	LEVEL
5	SEVERE
4	HIGH
3	MODERATE
2	LOW
1	MINIMAL



Global Situational Awareness

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