

GULF COOPERATION COUNCIL REGION

# GCC Weekly Intelligence

20 July 2026

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Actionable Intelligence – Regional Protection



# Executive Summary

## BOTTOM LINE UP FRONT

The GCC remains in active containment as Kuwait's power infrastructure attack, Bahrain air alerts, renewed US strikes and contested Hormuz routing keep the region unstable.

- The GCC remains in active containment as Kuwait's power infrastructure, Bahrain air alerts, renewed US strikes and Hormuz routing disputes keep the region unstable. The latest shift is that the crisis has moved deeper into critical infrastructure and maritime enforcement. Kuwait has reported a new Iranian attack on a power and water desalination plant, causing a fire and affecting multiple generating units. This follows earlier Kuwaiti infrastructure exposure and confirms that Kuwait is no longer facing only missile, drone or airspace sensitivity; it is now inside the active infrastructure-risk envelope.
- Hormuz remains the central maritime trigger. Iran says the June MoU is suspended after accusing the US of violating its commitments, while the IRGC says two ships were involved in an "accident" after attempting to transit through what Tehran described as a US-backed unsafe route. Iran continues to frame safe passage around its own designated shipping lane, while the US continues strikes intended to degrade IRGC capability and protect commercial shipping.
- Bahrain remains highly exposed after renewed air-raid alerts and public-safety instructions. Saudi Arabia remains domestically steady but exposed through Houthi/Yemen activity, Red Sea/Bab el-Mandeb risk and Hormuz-linked energy confidence. Qatar remains exposed through LNG, Hormuz and mediation pressure. Oman remains central to Hormuz de-confliction and southern-route risk. The UAE remains operationally stable but exposed through aviation management, GNSS risk, maritime insurance and Hormuz-linked cargo.

Saudi Arabia — Watch — **HIGH**

Kuwait — Deteriorating — **SEVERE**

UAE — Watch — **HIGH**

Oman — Deteriorating — **HIGH**

Bahrain — Deteriorating — **SEVERE**

Qatar — Deteriorating — **HIGH**

### PLANNING ASSUMPTION

Plan for active containment with rising infrastructure risk. Movement remains possible across most of the GCC, but the operating environment is unstable. Posture should remain elevated until Kuwait records no further power, water, missile or drone incidents; Bahrain records no further air-raid alerts; Hormuz transits continue without new vessel accidents, strikes or forced redirections; and any US-Iran diplomatic track produces a practical maritime mechanism. The June MoU should now be treated as politically weakened rather than a reliable restraint framework.

[ Assessed — moderate confidence ]

# Regional Risk Snapshot

| COUNTRY      | STRIKE | INFRA    | OPS      | TREND       | ONE-LINE STATUS                                                                                       |
|--------------|--------|----------|----------|-------------|-------------------------------------------------------------------------------------------------------|
| Bahrain      | SEVERE | HIGH     | HIGH     | ▲ WORSENING | Air-raid alerts, shelter guidance and US-linked posture keep Bahrain inside the severe-risk envelope. |
| Kuwait       | SEVERE | HIGH     | HIGH     | ▲ WORSENING | Power and water infrastructure targeting, drone threats and FIR restrictions keep Kuwait severe.      |
| Qatar        | HIGH   | HIGH     | HIGH     | ▲ WORSENING | LNG exposure, mediation pressure and Hormuz-linked tanker risk keep Qatar highly exposed.             |
| UAE / Dubai  | HIGH   | MODERATE | MOD-HIGH | ▲ WORSENING | Operationally stable, but GNSS interference, flow-control measures and Hormuz exposure remain active. |
| Saudi Arabia | HIGH   | MODERATE | MODERATE | ▲ WORSENING | Domestic conditions remain steady, but Houthi, Red Sea and Hormuz exposure keep risk elevated.        |
| Oman         | HIGH   | HIGH     | HIGH     | ▲ WORSENING | Hormuz proximity, Musandam exposure and southern-route enforcement risk keep Oman exposed.            |

RISK SCALE    LOW   MODERATE   HIGH   SEVERE   CRITICAL



# Saudi Arabia

## SECURITY SITUATION

Saudi Arabia remains domestically steady, but its external risk posture remains elevated because the current crisis affects both of the Kingdom’s main maritime exposure points: Hormuz and the Red Sea/Bab el-Mandeb corridor. The wider report is focused on Iran, Hormuz, Kuwait and Bahrain, but Saudi Arabia’s key exposure is different. For Riyadh, Yemen-linked and Houthi risk can return through the Red Sea, southern approaches and air-defence environment while the Gulf remains focused on Hormuz. The latest Yemen-related development reinforces this risk. Yemen’s internationally recognised government prevented an Iranian aircraft from landing at Sanaa airport, while previous related action around Sanaa was followed by Houthi accusations against Saudi Arabia and missile activity toward Saudi territory. This matters because Yemen can become a parallel pressure point even when the main crisis is centred on Hormuz.

## AVIATION

Saudi airspace remains open and usable for international and domestic operations. Jeddah and Riyadh FIR routes continue to support regional aviation resilience, but operators should review exposure to two separate risk zones: northern Gulf escalation linked to Iran and Red Sea/Yemen-linked activity tied to the Houthis. The main aviation exposure remains indirect: rerouting pressure, fuel-cost volatility, short-notice NOTAM activity and diversion planning if Gulf, Red Sea, Yemen or Iraq-linked airspace sensitivity increases. Operators should apply elevated review for Eastern Province, Riyadh, Jeddah, Red Sea and southern Saudi routes.

## MARITIME

Saudi maritime exposure remains high because Hormuz and the Red Sea are both active risk corridors. Hormuz affects tanker confidence, Gulf energy routing and insurance sentiment. The Red Sea and Bab el-Mandeb affect western cargo routes, Jeddah-linked trade, crew security and access to the Suez route. The Houthi angle matters because a renewed attack pattern against Saudi Arabia or Red Sea-linked shipping would create a second maritime pressure point while Hormuz remains contested. This would complicate rerouting, insurance, tanker scheduling and cargo planning. Ras Tanura, Jubail, Jeddah Islamic Port, Red Sea approaches and Hormuz-linked tanker routes should remain key monitoring points.

## MOVEMENT - SUPPLY CHAIN

- Saudi land-border connectivity remains broadly functional. The UAE–Saudi Ghuwafat/Al Batha route, Bahrain–Saudi King Fahd Causeway, Qatar–Saudi Abu Samra/Salwa crossing, Jordan–Saudi crossings and Kuwait–Saudi routes remain usable for authorised passenger and commercial traffic under standard controls.
- The main supply-chain exposure is not domestic land access, but maritime and energy-linked disruption. Cargo planners should build buffers for fuel pricing, customs delays, driver availability, insurance review and maritime rerouting. Maintain alternate routing through UAE, Bahrain and Qatar where relevant, and avoid assuming that Gulf logistics have normalised simply because Saudi domestic movement remains steady.

### RISK RATINGS

|               |          |
|---------------|----------|
| Political     | HIGH     |
| Business      | HIGH     |
| Economic      | HIGH     |
| Conflict      | HIGH     |
| Civil Unrest  | MODERATE |
| Environmental | LOW      |
| Crime         | LOW      |
| Legal         | LOW      |

### MITIGATIONS & RECOMENDATIONS

Confirm war-risk cover, monitor Hormuz, Red Sea and Bab el-Mandeb routes, review staff-accountability procedures, and keep resilience plans for water, fuel, power and essential supplies. Treat Saudi Arabia as domestically stable but externally exposed through Red Sea/Houthi activity, Hormuz risk and energy-security pressure.

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# United Arab Emirates

## SECURITY SITUATION

The UAE remains operationally stable, but the surrounding risk environment remains elevated. The latest change is that the June MoU is no longer a reliable stabilising assumption, while US strikes, Iranian retaliation, Kuwait infrastructure attacks and Hormuz routing disputes keep the wider Gulf operating picture unstable. The UAE should still be treated as resilient, but not normalised. Any further Iranian targeting of GCC states, Hormuz-linked vessel incident, US strike activity or regional air-defence alert could affect aviation, public messaging and logistics planning at short notice.

## AVIATION

UAE airspace remains open, but flight operations should be treated as actively managed. The latest UAE NOTAM continues to warn of GNSS signal interference within Emirates FIR, including possible spoofing and jamming. This means aircraft may experience unreliable navigation signals and may need to use alternative navigation methods, with any anomalies reported to ATC. Flow-control measures also remain in place for selected UAE departures exiting Emirates FIR, including routes linking onward to Amman FIR and departures via Muscat-related routing. Affected aircraft may require departure slot timing before leaving UAE airspace. This does not mean UAE aviation is closed or unsafe. It means travel and air cargo should not be planned on fully routine assumptions. Passenger travel, executive movement and time-sensitive cargo should allow for possible rerouting, departure-slot delays, routing restrictions and last-minute operational changes, especially on routes linked to Saudi Arabia, Oman, Jordan, Iraq, Iran or the wider northern Gulf.

## MARITIME

UAE ports remain operational, including Jebel Ali, Khalifa Port and Fujairah. Hormuz remains the key exposure. Iran’s latest claim that ships were involved in an “accident” after using a US-backed unsafe route reinforces that vessel routing is now politically contested, not only operational. Fujairah remains a key UAE advantage because it sits outside the inner Gulf and supports bunkering, storage and logistics on the Gulf of Oman side. However, it remains exposed to Hormuz sentiment, insurer caution, vessel availability, war-risk pricing and crew-security concerns. Hormuz-linked cargo should not be treated as routine even if ports remain open.

## MOVEMENT - SUPPLY CHAIN

- UAE land connectivity remains open through the Saudi border at Ghuwaifat/Al Batha and the Oman crossings, including Hatta/Al Wajajah and Khatmat Malaha. These routes should remain primary resilience channels for overland passenger movement, road freight and contingency evacuation from the western and eastern UAE.
- The UAE’s key supply-chain exposure is maritime and air-linked rather than domestic movement. Jebel Ali, Khalifa Port and Fujairah remain central to regional cargo flows, but Hormuz enforcement, Red Sea uncertainty, insurance caution and aviation route management keep Gulf-linked cargo vulnerable.

### RISK RATINGS

|               |          |
|---------------|----------|
| Political     | MODERATE |
| Business      | HIGH     |
| Economic      | MODERATE |
| Conflict      | MODERATE |
| Civil Unrest  | LOW      |
| Environmental | LOW      |
| Crime         | LOW      |
| Legal         | LOW      |

### MITIGATIONS & RECOMENDATIONS

Confirm NOTAMs before air movement, verify war-risk cover, keep UAE–Saudi and UAE–Oman land-route options live, and maintain executive movement controls.



## SECURITY SITUATION

Oman remains strategically exposed because Hormuz is still the centre of the crisis. The southern route remains important for commercial transit, but Iran’s claim that safe passage depends on its designated shipping lane keeps Oman close to the enforcement dispute.

Musandam remains especially important because of its proximity to the Strait and the southern transit route. Oman is still a key de-confliction state, but its geography places it close to the operational friction point between US maritime enforcement, Iranian pressure and commercial shipping.

## AVIATION

Oman airspace remains open and continues to support regional rerouting around higher-risk airspace. Muscat FIR remains important because some operators may use southern or Gulf bypass routes while Iran, Iraq, Yemen, Lebanon, Syria and northern Gulf risk remains elevated.

Flight planning should remain cautious. Operators should monitor NOTAMs, routing links with UAE and Saudi airspace, fuel planning, flow-control measures and any changes linked to Hormuz, Red Sea activity, Musandam security developments or regional military movement.

## MARITIME

Hormuz remains Oman’s main operational and geopolitical exposure. Iran says two ships were involved in an accident after attempting to use a US-backed unsafe route, while also saying the Strait is under its complete control and that the only safe passage is the lane designated by Iranian authorities. This directly affects Oman because the southern route and waters near Musandam sit at the centre of the dispute.

For Oman, the key issue is not whether the southern route is physically open; it is whether vessels can use it without being caught in US-Iran enforcement pressure. The route may remain available, but it is politically contested and commercially exposed. Shipping teams should assume elevated war-risk pricing, insurer scrutiny, route checks, VHF monitoring and heightened reporting requirements.

## MOVEMENT - SUPPLY CHAIN

- Oman–UAE land crossings remain open and should continue to support passenger movement, road freight and contingency access between Muscat, Sohar, Buraimi, Hatta and the wider UAE logistics network.
- Oman’s main supply-chain exposure is maritime rather than domestic movement. Ports and land routes remain usable, but Hormuz-linked cargo, tanker scheduling, marine insurance and crew-security planning remain sensitive. Keep UAE land routes available for urgent movement if maritime conditions deteriorate.

### RISK RATINGS

|               |          |
|---------------|----------|
| Political     | HIGH     |
| Business      | HIGH     |
| Economic      | MODERATE |
| Conflict      | MODERATE |
| Civil Unrest  | MODERATE |
| Environmental | LOW      |
| Crime         | LOW      |
| Legal         | LOW      |

### MITIGATIONS & RECOMENDATIONS

Confirm Omani, IMO and UKMTO routing guidance, verify war-risk insurance, monitor VHF instructions, keep AIS/LRIT active where required, and maintain UAE land-route alternatives.



# Bahrain

## SECURITY SITUATION

Bahrain remains one of the most sensitive GCC environments after fresh air-raid alerts and renewed public-safety guidance. Bahrain’s US-linked security profile, high military-activity environment and proximity to Gulf military movement keep the country highly exposed during the current US-Iran exchange.

The main risk is not only direct attack. It is the speed with which regional military activity can trigger sirens, public-safety guidance, aviation disruption, staff movement controls and executive travel restrictions. Priority monitoring areas include government sites, diplomatic locations, military-linked facilities, airport areas, ports, residential compounds and high-footfall commercial locations.

## AVIATION

Bahrain aviation remains open but highly sensitive. The latest air-raid alerts confirm that Bahrain can move quickly from normal operations to public-safety posture. Existing aviation sensitivity remains linked to high military activity, potential GPS interference, regional missile/drone activity and short-notice routing changes.

Executive travel, staff rotations and time-sensitive cargo should not be planned on normal assumptions without confirming current airspace status and flight permissions. During alert periods, personnel should follow official instructions, avoid exposed areas and maintain staff-accountability procedures.

## MARITIME

Bahrain’s ports remain usable, but maritime exposure is tied to the wider Gulf rather than a specific port shutdown. Hormuz disruption, tanker caution, war-risk pricing, vessel incidents and insurer restrictions can all affect cargo confidence and delivery windows into Bahrain.

Because Bahrain relies heavily on regional logistics links, maritime disruption can quickly push pressure onto air cargo and the King Fahd Causeway. Port users should confirm vessel schedules, insurer approval, cargo timing, crew-safety procedures and contingency delivery windows before moving critical cargo.

## MOVEMENT - SUPPLY CHAIN

- The King Fahd Causeway remains Bahrain’s primary movement and supply-chain link with Saudi Arabia. It should remain the key route for passenger movement, freight support, staff relocation, medical evacuation planning and contingency access to the wider GCC road network.
- Routine movement continues, but movement approvals, staff accountability and shelter-in-place planning should remain tightened. During alert periods, avoid non-essential movement near sensitive sites, pre-identify safe assembly points and maintain rapid cross-border relocation options into Saudi Arabia.

### RISK RATINGS

|               |          |
|---------------|----------|
| Political     | HIGH     |
| Business      | HIGH     |
| Economic      | HIGH     |
| Conflict      | HIGH     |
| Civil Unrest  | LOW      |
| Environmental | LOW      |
| Crime         | LOW      |
| Legal         | MODERATE |

### MITIGATIONS & RECOMENDATIONS

Verify airspace status, keep Causeway relocation plans live, avoid sensitive sites during alerts, maintain staff-accountability checks, and confirm cross-border transport availability.



## SECURITY SITUATION

Qatar remains diplomatically important but strategically exposed. Doha's mediation role remains relevant, but the suspension of the June MoU by Iran reduces confidence that the diplomatic track can contain operational risk in the near term.

Qatar's main exposure remains indirect but significant: LNG exports, tanker confidence, Hormuz transit, air-defence risk and mediation pressure. Qatar should remain at high risk until debris and air-defence incidents stop, maritime activity remains stable and Hormuz transit normalises.

## AVIATION

Qatar airspace remains open and Hamad International Airport continues to support normal commercial operations. The main aviation risk is indirect but elevated. If Gulf tensions increase further, Qatar-linked routes could face rerouting, delays, NOTAM changes, airspace restrictions or fuel-planning changes.

Maintain diversion planning, monitor regional airspace updates and allow for schedule changes if Kuwait, Bahrain, Iran, Iraq or Hormuz-linked tensions increase. During interception activity, staff should avoid exposed areas, windows and any debris.

## MARITIME

Qatar's maritime risk remains high because LNG exports depend on Hormuz confidence. Iran's latest claim that only its designated route is safe adds uncertainty for tanker routing, insurer approval and cargo timing. Any new vessel accident, warning-shot event, seizure threat, forced redirection, insurance restriction or strike near Hormuz could affect tanker availability and market confidence even if Qatari infrastructure remains secure.

The main risk is not domestic port closure, but tanker caution, Iranian control claims, war-risk pricing, vessel incidents, mine concerns and insurer restrictions affecting ships moving through the strait.

## MOVEMENT - SUPPLY CHAIN

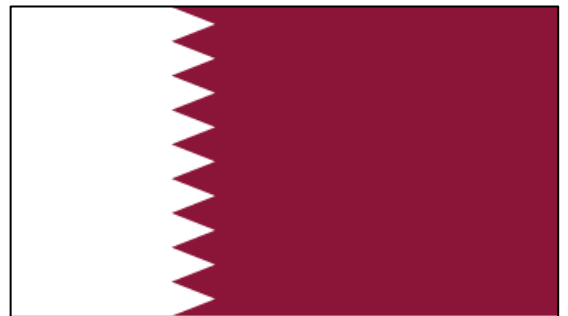
- Qatar's Abu Samra/Salwa crossing with Saudi Arabia remains open and should continue to support passenger movement, road freight and regional contingency access. This route remains important for fallback access to the wider GCC road network.
- Qatar remains operationally stable onshore, but its supply-chain exposure is high because LNG exports, air cargo, food security and port operations depend on confidence in Hormuz and wider Gulf maritime routing. Build cargo-delay buffers, monitor LNG and tanker movement, verify insurer conditions, maintain Qatar-Saudi land-route options and review air-cargo contingency plans if Gulf airspace warnings increase.

### RISK RATINGS

|               |          |
|---------------|----------|
| Political     | HIGH     |
| Business      | HIGH     |
| Economic      | HIGH     |
| Conflict      | MODERATE |
| Civil Unrest  | MODERATE |
| Environmental | MODERATE |
| Crime         | LOW      |
| Legal         | LOW      |

### MITIGATIONS & RECOMENDATIONS

Monitor LNG, maritime and aviation conditions, confirm insurer and port guidance, maintain Qatar-Saudi land-route options, and keep executive travel plans flexible. Reinforce debris-awareness guidance during interception activity.



## SECURITY SITUATION

Kuwait remains the most exposed GCC environment after a new Iranian attack hit a power and water desalination plant, triggering a fire and affecting multiple generating units. This marks a further deterioration from airspace and drone-interception risk into direct critical infrastructure exposure.

The main concerns are missile and drone activity, air-defence response, power and water disruption, debris risk, northern Gulf exposure, energy infrastructure vulnerability, Kuwait-Iraq border restrictions, GPS interference and proximity to Iraq-linked escalation routes. Security planning should remain elevated around government sites, diplomatic locations, military-linked facilities, power and water infrastructure, ports, airports, offshore assets, residential compounds and high-footfall commercial areas.

## AVIATION

Kuwait aviation should be treated as highly sensitive. Kuwait FIR restrictions and GPS interference concerns remain relevant, and any missile or drone activity can rapidly trigger airspace disruption, rerouting, delays or temporary operating restrictions.

Passenger travel, executive movement and air cargo should only proceed after confirming current air permissions, flight status and routing. Kuwait should remain one of the most closely checked aviation environments in the GCC until there is a sustained clean period without missile, drone, GPS, airspace, power, water or infrastructure disruption.

## MARITIME

Kuwait's maritime exposure remains high because its Gulf access depends on confidence in Hormuz and northern Gulf routing. The main risk is not port closure, but vessel caution, war-risk pricing, insurer restrictions, tanker availability and possible delays affecting Kuwait-linked cargo.

The latest Hormuz routing dispute adds a new enforcement layer to northern Gulf movement. Even if Kuwait-linked ports remain usable, shipping confidence can be affected quickly by missile activity, US-Iran tensions, vessel redirection, Iranian control claims over Hormuz or insurance tightening.

## MOVEMENT - SUPPLY CHAIN

- Kuwait requires strong movement controls. Kuwait-Saudi crossings, including Nuwaisib and Salmi, remain the main usable overland routes for authorised passenger and freight movement. These should be treated as the primary fallback for staff movement, urgent logistics and southbound contingency relocation.
- The Kuwait-Iraq border remains restricted or closed for normal travel unless Kuwaiti and Iraqi authorities confirm otherwise. Do not route staff or time-sensitive cargo through the Iraq border without official confirmation, written movement authority and security review. Movement planning should account for possible delays, temporary restrictions, alert activity, utility disruption and heightened security screening.

### RISK RATINGS

|               |        |
|---------------|--------|
| Political     | HIGH   |
| Business      | HIGH   |
| Economic      | HIGH   |
| Conflict      | SEVERE |
| Civil Unrest  | LOW    |
| Environmental | HIGH   |
| Crime         | LOW    |
| Legal         | LOW    |

### MITIGATIONS & RECOMENDATIONS

Confirm air permissions, prioritise Kuwait–Saudi overland routing, avoid Kuwait–Iraq movement unless officially cleared, maintain staff-accountability checks, and keep three-day resilience plans for water, power, fuel and essential supplies. Review power and water continuity plans immediately.



# Escalation Triggers

## RED ACT NOW

- Kuwait records further attacks on power, water, desalination, energy, border or military-linked infrastructure.
- Bahrain records further air-raid alerts, sirens, interceptions, explosions, damage or public-safety restrictions.
- US strikes on Iran expand further or trigger additional Iranian retaliation against GCC territory, shipping or energy infrastructure.
- Iran attempts to enforce its designated Hormuz route through kinetic action, warning fire, vessel disablement or seizure.

## AMBER WATCH

- Iran continues to say the June MoU is suspended while blaming the US for violating its commitments.
- Iran continues to frame Hormuz safety around its own designated shipping lane.
- US strikes continue against IRGC, naval, missile, drone or coastal targets.
- Jordan, Iraq, Yemen or Lebanon incidents distract from or weaken any US-Iran diplomatic track.

## GREEN IMPROVING

- Kuwait records a sustained clean period without further power, water, missile, drone or infrastructure incidents.
- Hormuz transits continue without further vessel accidents, strikes, seizures, warning shots, forced redirections or route disputes.
- US and Iran restore a practical maritime mechanism despite the MoU suspension. GCC air routes remain open without major new disruption.

### Additional watch items

- Kuwait power and water plant recovery, generating-unit availability and emergency operating measures.
- Bahrain public-safety alerts, shelter guidance and air-defence posture.
- Iranian statements on the suspended MoU and Hormuz route control.
- US strike tempo against IRGC units, coastal sites, missile systems and drone infrastructure.
- Hormuz vessel incidents, accidents, route disputes and insurer reaction.
- UAE GNSS interference, departure flow controls and Emirates FIR routing restrictions.
- Yemen aviation restrictions, Houthi response and Saudi southern-border implications.
- Qatar LNG flows, mediation role and tanker-routing confidence.

### Positive confirmation signals

- No further Kuwait power, water or infrastructure attacks for seven days.
- No further Bahrain sirens, air-raid alerts or interception activity.
- Hormuz remains open without further vessel accidents or enforcement action.
- UAE aviation remains open without expansion of GNSS disruption or departure flow controls.
- War-risk cover remains available for Hormuz-linked cargo.
- US-Iran messaging shifts from retaliation to negotiation.
- Qatar, Oman and Saudi Arabia remain engaged in de-escalation diplomacy.
- GCC air routes remain open without major new disruption.
- GCC land borders remain open and functioning under standard controls.

# Look Ahead

The regional outlook has deteriorated from active containment into active containment with critical infrastructure exposure. Kuwait's power and water plant attack is the clearest change since the previous update. It shows that the strike cycle is no longer limited to military sites, airspace alerts or maritime pressure; it can now affect essential services, emergency planning and business continuity.

The June MoU should no longer be treated as a reliable stabilising framework. Iran has said it suspended its commitments after accusing the US of violating the agreement, while US strikes on IRGC units continue. This weakens the diplomatic floor under the current crisis and increases the risk that each side uses maritime, military or infrastructure pressure to shape the next negotiating position.

Hormuz remains the decisive physical and political test. Iran's claim that two ships were involved in an "accident" after attempting to use a US-backed unsafe route reinforces the central problem: the Strait remains open in parts, but route control is contested. For operators, this means transit is possible but not routine. Route choice, insurer approval, crew safety, naval signalling and Iranian enforcement language all matter.

**Next 72–96 hours:** Watch Kuwait, Bahrain, Hormuz and US strike tempo. The immediate indicators are additional power or water disruptions in Kuwait, further Bahrain air-raid alerts, new Hormuz vessel incidents, US strikes against IRGC units, Iranian retaliation language and any aviation restrictions across the northern Gulf. A further infrastructure attack or vessel incident would confirm that escalation is still moving.

**Next 7–14 days:** The key question is whether the crisis can return to a maritime de-confliction channel after Iran's suspension of the MoU. If Hormuz traffic continues without further incidents and Kuwait's power/water system stabilises, risk may hold at a severe but manageable level. If Iran enforces route control or the US expands strikes, commercial confidence will weaken quickly.

**Next month:** The most likely scenario is prolonged active containment with repeated tactical shocks. Kuwait and Bahrain remain the most sensitive indicators for direct GCC spillover. Oman and Qatar remain essential to any de-confliction pathway, but both are exposed through Hormuz and mediation pressure. Saudi Arabia must manage the parallel Red Sea/Yemen risk, while the UAE remains operationally stable but exposed through aviation and maritime routing.

**Planning baseline:** Treat the region as open but unstable, with Kuwait now requiring additional utility-resilience planning. Operational movement can continue, but posture should remain elevated until four indicators align: Kuwait records no further infrastructure attacks; Bahrain records no further air-raid alerts; Hormuz traffic continues without new accidents or enforcement action; and the US-Iran track produces a practical maritime mechanism after the MoU suspension.

Saudi Arabia — Houthi, Red Sea and Hormuz exposure keep posture elevated — **HIGH**

Kuwait — Power/water infrastructure attacks and northern Gulf exposure keep Kuwait severe — **SEVERE**

UAE — Operationally stable but exposed to Hormuz, aviation flow controls and GNSS disruption — **HIGH**

Oman — Hormuz route-control dispute keeps Oman strategically exposed — **HIGH**

Bahrain — Air-raid alerts and US-linked profile keep exposure severe — **SEVERE**

Qatar — LNG exposure, mediation pressure and Hormuz risk keep Qatar high — **HIGH**

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# Global Security Awareness

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Global Security Awareness delivers decision-ready security intelligence to corporate security teams, travel risk managers and executive leadership operating across the Gulf Cooperation Council and the wider MENA region.

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## METHODOLOGY

Risk ratings (LOW to SEVERE) are professional judgements based on the information available at the time of writing and are not guarantees of outcome. Strike, infrastructure and operational risk are scored independently for each country and tracked week-on-week.

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