

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

23 July 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

The GCC remains in active containment as Iranian energy-infrastructure threats, Bahrain interceptions, Saudi air alerts and contested Hormuz routing keep the region unstable.

- The GCC remains in active containment as Iranian energy-infrastructure threats, Bahrain interceptions, Saudi air alerts and contested Hormuz routing keep the region unstable. The latest shift is that regional risk has moved beyond maritime enforcement and into a broader infrastructure-threat environment. Iran has warned that regional energy infrastructure could be targeted if Iranian bridges, power plants or other critical facilities are struck. This raises the risk profile for Gulf energy, utilities, desalination, ports, offshore infrastructure and US-linked facilities.
- Kuwait remains the most exposed GCC state after repeated attacks affecting power and water infrastructure. Bahrain remains in a severe-risk posture after a new wave of Iranian aerial attacks was intercepted and authorities again urged public caution around suspicious debris. Saudi Arabia's risk has increased after warning sirens were briefly activated in Dammam over possible Iranian attacks, while Houthi maritime-blockade threats continue to affect Red Sea and Bab el-Mandeb confidence.
- Hormuz remains the central maritime trigger. Explosions have been reported around Lark Island and Sirik near the Strait, while Iran continues to frame safe passage around its own designated route. The US continues to reject Iranian control over international waterways and says it remains open to a diplomatic settlement, but military activity and maritime enforcement risk continue in parallel. The UAE remains operationally stable but exposed through GNSS interference, departure flow controls, aviation route management, maritime insurance and Hormuz-linked cargo. Oman remains strategically exposed because Musandam and the southern Hormuz route sit close to the enforcement dispute. Qatar remains exposed through LNG, tanker confidence and mediation pressure.

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 energy and infrastructure risk. Movement remains possible across most of the GCC, but posture should remain elevated until Kuwait records no further power, water or infrastructure incidents; Bahrain records no further interceptions or air alerts; Saudi Arabia records no further warning-siren or Houthi-linked escalation activity; Hormuz traffic stabilises without new vessel accidents, strikes or forced redirections; and the US-Iran diplomatic track produces a practical maritime mechanism. Diplomatic messaging remains active, but it is not yet reducing operational risk.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	SEVERE	HIGH	HIGH	▲ WORSENING	New Iranian aerial attacks, interceptions and public-safety warnings keep Bahrain severe.
Kuwait	SEVERE	HIGH	HIGH	▲ WORSENING	Repeated power and water targeting keeps Kuwait inside the active infrastructure-risk envelope.
Qatar	HIGH	HIGH	HIGH	▲ WORSENING	NG 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 controls and Hormuz exposure remain active.
Saudi Arabia	HIGH	MODERATE	MODERATE	▲ WORSENING	Dammam sirens, Houthi blockade threats and Red Sea/Hormuz exposure raise Saudi risk.
Oman	HIGH	HIGH	HIGH	▲ WORSENING	Hormuz proximity, Musandam exposure and southern-route enforcement risk keep Oman exposed.

RISK SCALE LOW MODERATE HIGH SEVERE CRITICAL



GCC
Gulf Cooperation Council

Saudi Arabia

SECURITY SITUATION

Saudi Arabia remains domestically steady, but its external risk posture has increased. The key change is that Saudi Arabia is now exposed on three connected fronts: possible Iranian aerial threats in the Eastern Province, Houthi pressure from Yemen, and maritime disruption across both Hormuz and the Red Sea/Bab el-Mandeb corridor. Warning sirens were briefly activated in Dammam over possible Iranian attacks before the alert was lifted. This does not indicate a confirmed attack on Saudi territory, but it does show that Saudi Arabia can be pulled into the same air-alert environment affecting Kuwait and Bahrain. At the same time, Houthi maritime-blockade threats against Saudi-linked shipping reinforce that Yemen remains a live pressure point. The risk is that energy confidence, air-defence readiness, Red Sea routing, port operations and executive movement can be affected by external escalation.

AVIATION

Saudi airspace remains open and usable for international and domestic operations. However, operators should now review exposure to three risk zones: Eastern Province alert activity, northern Gulf escalation linked to Iran, and Red Sea/Yemen-linked activity tied to the Houthis. The main aviation exposure remains indirect but rising: warning-siren activity, airspace sensitivity, rerouting pressure, fuel-cost volatility, short-notice NOTAM activity and diversion planning if Gulf, Red Sea, Yemen or Iraq-linked airspace conditions change. 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 blockade threat against Saudi-linked shipping creates a second maritime pressure point while Hormuz remains contested. This could complicate rerouting, insurance, tanker scheduling, crew security 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 Ghuwair/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, energy and confidence-linked disruption. Cargo planners should build buffers for fuel pricing, customs delays, driver availability, insurance review and maritime rerouting. 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 Dammam alert sensitivity, Red Sea/Houthi activity, and Hormuz risk.

الله أكبر
لا إله إلا الله



United Arab Emirates

SECURITY SITUATION

The UAE remains operationally stable, but the surrounding risk environment remains elevated. The latest change is Iran’s warning that regional energy infrastructure could be targeted if Iranian infrastructure is struck. This keeps UAE exposure focused on energy, ports, aviation, maritime insurance, GNSS interference and Hormuz-linked cargo. 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, regional air-defence alert or energy-infrastructure threat 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. Aircraft may experience unreliable navigation signals and may need to use alternative navigation methods, with 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 continued insistence that safe passage depends on its own routing arrangements reinforces that vessel movement is 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. Review energy, fuel, port and data-centre continuity planning if regional infrastructure threats increase.



SECURITY SITUATION

Oman remains strategically exposed because Hormuz is still the centre of the crisis. The southern route remains important for commercial transit, but Iranian claims around designated safe passage keep 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. Explosions around Lark Island and Sirik, near the Strait of Hormuz, reinforce that the maritime operating environment is exposed to direct military activity close to the transit corridor.

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 a new wave of Iranian aerial attacks was intercepted. 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. Authorities continue to urge the public to avoid suspicious objects and debris linked to interceptions. 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. Repeated interception and air-alert activity confirms 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. Reinforce debris-awareness guidance and avoid any suspicious objects following interceptions.



SECURITY SITUATION

Qatar remains diplomatically important but strategically exposed. Doha's mediation role remains relevant as US officials continue to say they prefer a diplomatic settlement, but the operational environment remains unstable because military activity, maritime enforcement and energy-infrastructure threats continue in parallel. Qatar's main exposure remains indirect but significant: LNG exports, tanker confidence, Hormuz transit, air-defence risk and mediation pressure. Any Iranian move against regional energy infrastructure would immediately raise concern around LNG confidence, tanker routing, insurer approval and market reaction. 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 continued claim that safe passage depends on its designated route 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 repeated Iranian attacks affecting power and water infrastructure. The risk is now direct and infrastructure-linked, not only airspace-related. Kuwait is inside the active missile, drone and infrastructure-risk envelope. 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.

Kuwait has also summoned Iran's envoy over an attack on a Kuwaiti tanker, adding a direct maritime-diplomatic dimension to the crisis. 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

- Iran targets regional energy, power, water, desalination, port, offshore or data infrastructure.
- Kuwait records further attacks on power, water, desalination, tankers, energy, border or military-linked infrastructure.
- US strikes on Iran expand further or trigger additional Iranian retaliation against GCC territory, shipping or energy infrastructure.
- Saudi Arabia records further warning-siren activity, confirmed airspace threats, Houthi missile activity or Red Sea port/shipping disruption.

AMBER WATCH

- Iran continues to threaten regional energy infrastructure if its own power plants, bridges or civilian infrastructure are targeted.
- US officials keep the diplomatic track open but continue military action.
- Bab el-Mandeb traffic, tanker routing, freight rates or war-risk premiums deteriorate further.
- South Korea, European states or other US partners consider maritime or military support for Hormuz operations.

GREEN IMPROVING

- Kuwait records a sustained clean period without further power, water, missile, drone, tanker or infrastructure incidents.
- Saudi Arabia records no further warning-siren activity, Houthi missile activity or Red Sea-linked escalation.
- US-Iran messaging shifts from retaliation to negotiation and produces a practical maritime mechanism.

Additional watch items

- Iranian energy-infrastructure threats and whether GCC energy assets are named or implied.
- Kuwait power and water recovery, tanker incidents, generating-unit availability and emergency operating measures.
- Bahrain public-safety alerts, shelter guidance and air-defence posture.
- Saudi Dammam/Eastern Province alerts, Houthi response and Red Sea shipping exposure.
- US strike tempo against IRGC units, coastal sites, missile systems and drone infrastructure.
- Hormuz vessel incidents, accidents, route disputes and insurer reaction.
- Lark Island, Sirik, Qeshm and Bandar Abbas activity near the Strait.
- UAE GNSS interference, departure flow controls and Emirates FIR routing restrictions.
- Qatar LNG flows, mediation role and tanker-routing confidence.
- Oman's role in any maritime de-confliction mechanism.

Positive confirmation signals

- No further Kuwait power, water, tanker or infrastructure attacks for seven days.
- No further Bahrain sirens, air-raid alerts or interception activity.
- No further Saudi warning sirens, Houthi missile launches or Red Sea blockade escalation.
- 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, Red Sea and Bab el-Mandeb 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 with critical infrastructure exposure into active containment with explicit regional energy-infrastructure threats. Iran's warning that regional energy infrastructure could be targeted if Iranian bridges or power plants are struck is the clearest new escalation marker. It broadens the risk picture from military bases, airspace alerts and maritime transit into energy, utilities, ports, desalination and offshore infrastructure.

Hormuz remains the decisive physical and political test. Explosions reported around Lark Island and Sirik, near the Strait, reinforce that the maritime corridor is operating close to active military activity. Iran continues to frame safe passage around compliance with its own routing arrangements, while the US continues to reject Iranian control over international waterways and keeps military options active.

Kuwait and Bahrain remain the most sensitive GCC indicators. Kuwait is exposed through power, water, tanker and northern Gulf infrastructure risk. Bahrain is exposed through repeated Iranian aerial attacks, interceptions and public-safety alerts. Saudi Arabia has moved higher in the immediate watch picture after warning sirens were briefly activated in Dammam and Houthi maritime-blockade threats sharpened Red Sea risk. Qatar and Oman remain essential to any de-confliction pathway, but both remain exposed through LNG, Hormuz and mediation pressure. The UAE remains operationally stable, but aviation management, GNSS interference and maritime routing require continued monitoring.

Next 72–96 hours: Watch Kuwait, Bahrain, Saudi Arabia, Hormuz and US strike tempo. The immediate indicators are additional Kuwaiti infrastructure incidents, further Bahrain interceptions, any renewed Saudi warning sirens or Houthi missile activity, vessel incidents near Hormuz, US strikes against IRGC or coastal targets, and Iranian statements naming energy or infrastructure targets. A further infrastructure attack, confirmed tanker incident or GCC air-defence event would confirm continued escalation.

Next 7–14 days: The key question is whether diplomacy can begin reducing operational risk or whether military action continues to shape the negotiating environment. Rubio's statement that the US would prefer a diplomatic settlement keeps the diplomatic track open, but current military and maritime activity means operators should not treat diplomacy as a near-term risk reducer. If Hormuz traffic stabilises, Kuwait's utilities remain functional and Bahrain/Saudi alerts ease, risk may hold at a severe but manageable level. If Iran enforces route control or targets energy infrastructure, commercial confidence will weaken quickly.

Next month: The most likely scenario is prolonged active containment with repeated tactical shocks. The GCC operating environment is unlikely to fully close, but shipping, aviation, insurance, energy and executive movement will remain exposed to short-notice disruption. Red Sea and Bab el-Mandeb risk now matter alongside Hormuz, especially for Saudi Arabia and western cargo routes. The practical planning issue is no longer only missile risk; it is whether companies can sustain operations through repeated alerts, rerouting, insurance increases, energy anxiety and infrastructure uncertainty.

Planning baseline: Treat the region as open but unstable, with Kuwait, Bahrain and Saudi Arabia requiring the closest watch. Operational movement can continue, but posture should remain elevated until five indicators align: Kuwait records no further infrastructure or tanker incidents; Bahrain records no further air-raid alerts; Saudi Arabia records no further warning-siren or Houthi-linked escalation activity; Hormuz traffic continues without new accidents or enforcement action; and the US-Iran track produces a practical maritime mechanism.

Saudi Arabia — Dammam sirens, Houthi blockade threats and Red Sea/Hormuz exposure raise risk — **HIGH**

Kuwait — Power/water infrastructure and tanker exposure keep Kuwait severe — **SEVERE**

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

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

Bahrain — New Iranian aerial attacks and US-linked profile keep exposure severe — **SEVERE**

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

ABOUT & CONTACT

Global Security Awareness

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.

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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