

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

30 July 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

Hormuz enforcement risk, Iraq-linked proxy pressure, Bahrain Shield and Saudi energy threats keep the GCC in active containment despite continued diplomatic channels.

■ The GCC remains in active containment as Iraq-linked escalation, tanker stoppages, Iran’s lane-control demand and Bahrain Shield harden the regional risk picture. Current reporting indicates that the earlier diplomatic opening has weakened. US messaging has shifted back toward pressure, with Washington signalling that military action can continue while talks remain open. This means diplomacy is still available, but it is now operating under renewed strike pressure, Iraq-linked retaliation risk and a more contested maritime environment. Hormuz is again the central trigger. The IRGC Navy says it stopped three oil tankers in the Strait of Hormuz after alleged violations, but did not identify the vessels or provide full details. Iran has also hardened its position toward Oman, with Iranian-linked reporting indicating that Tehran wants one shipping lane to remain entirely under Iranian control, with part of another lane also under Iranian control. This is a major operational shift. The problem is no longer only mines, tanker incidents or blockade enforcement. It is now a lane-control dispute. Iran is trying to turn safe passage into a managed-access regime, while the US and GCC states continue to frame Hormuz around freedom of navigation, passage rights, supply continuity and international law. The Iraq track has also become central. Iraq has moved from being an exposed transit area to an active arena of confrontation after coordinated US-Saudi strikes hit PMF/IAMG sites across multiple governorates. Iran-aligned groups may now attempt retaliation against US facilities, Saudi interests, diplomatic sites, energy infrastructure or logistics routes. Drone activity around Erbil, Harir Air Base and Khor Mor also keeps northern Iraq, energy supply and aviation risk elevated. Saudi Arabia’s posture has deteriorated because Iraq-linked armed groups are now part of the Saudi threat picture. Drone attacks against Saudi energy infrastructure, combined with US-Saudi strikes in Iraq, create a new escalation pathway involving further attacks on Saudi energy sites, Saudi diplomatic interests in Iraq, or US-linked facilities. Houthi and Red Sea pressure also remain active. Bahrain’s exposure has increased because it is hosting Bahrain Shield, a GCC-wide military exercise from 28–30 July. The UAE remains operationally stable but exposed through aviation disruption, GNSS interference, flow controls, maritime insurance and Hormuz-linked cargo. Qatar remains exposed through LNG, mediation and Hormuz-linked tanker risk. Oman is central to whether a practical Hormuz mechanism can be reached.

- Saudi Arabia — Deteriorating — **HIGH**
- Kuwait — Deteriorating — **SEVERE**
- UAE — Watch — **HIGH**
- Oman — Deteriorating — **HIGH**
- Bahrain — Deteriorating — **SEVERE**
- Qatar — Watch — **HIGH**

PLANNING ASSUMPTION

Plan for active containment with elevated maritime and proxy risk. Movement remains possible across most of the GCC, but posture should stay elevated until Hormuz transits stabilise, Oman-Iran talks produce a recognised mechanism, Iraq-Gulf strike activity does not widen, Bahrain Shield passes without retaliation, Saudi Red Sea exposure eases, and Kuwait/Bahrain record a clean period without alerts or infrastructure attacks.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	SEVERE	HIGH	HIGH	▲ WORSENING	Bahrain Shield, recent interceptions and US-linked posture keep Bahrain inside the severe-risk envelope.
Kuwait	SEVERE	HIGH	HIGH	► WATCH	Power, water, tanker, Abdali-Safwan and northern Gulf exposure keep Kuwait severe.
Qatar	HIGH	HIGH	HIGH	► WATCH	LNG exposure, mediation pressure, maritime-safety warnings and Hormuz-linked tanker risk keep Qatar highly exposed.
UAE / Dubai	HIGH	MODERATE	MOD-HIGH	► WATCH	Operationally stable, but GNSS interference, flow controls, airline disruption and Hormuz exposure remain active.
Saudi Arabia	HIGH	MODERATE	MODERATE	▲ WORSENING	Iraq-linked drone risk, Houthi pressure and Red Sea/Hormuz exposure raise Saudi risk.
Oman	HIGH	HIGH	HIGH	▲ WORSENING	Iran's lane-control demand makes Oman central to whether Hormuz can be reopened safely.

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 deteriorated. The key change is that Saudi Arabia is now more directly exposed to the wider confrontation through Iraq-linked drone activity, continuing Houthi pressure and Red Sea/Bab el-Mandeb disruption. US and Saudi strikes against PMF/IAMG sites in Iraq followed repeated drone attacks against Saudi energy infrastructure and US-linked targets. It is also managing escalation risk from Iran-backed groups in Iraq, which could affect petroleum infrastructure, border security, air-defence posture and diplomatic relations with Baghdad. The Houthi and Red Sea issue remains active. Longer Suez routing, Bab el-Mandeb disruption and attacks or threats against Saudi-linked shipping continue to affect energy confidence, insurance and export planning.

AVIATION

Saudi airspace remains open and usable for international and domestic operations, but aviation exposure remains elevated. Operators should review four risk zones: Eastern Province alert sensitivity, Iraq-linked escalation, northern Gulf escalation tied to Iran, and Red Sea/Yemen-linked activity tied to the Houthis. The main aviation exposure remains indirect: warning-siren activity, airspace sensitivity, airline caution, rerouting pressure, fuel-cost volatility, short-notice NOTAM activity and diversion planning if Gulf, Iraq, Red Sea, Yemen or Iran-linked airspace conditions change. Regional airline suspensions and schedule changes show that commercial carriers remain cautious even where local airspace remains open.

MARITIME

Saudi maritime exposure is high across both Hormuz and the Red Sea. Hormuz affects tanker confidence, Gulf energy routing and insurance sentiment. The Red Sea and Bab el-Mandeb affect western cargo routes, Suez access, Jeddah-linked trade and crude-export timing. The Houthi angle remains important because blockade threats and claimed attacks against Saudi-linked assets create a second maritime pressure point while Hormuz remains contested. The Iraq-linked strike environment adds a further energy-security layer, because retaliatory action from Iran-backed groups could target Saudi petroleum infrastructure or associated logistics.

MOVEMENT - SUPPLY CHAIN

- Saudi land-border connectivity remains broadly functional. The UAE–Saudi Ghuwaifat/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 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, Suez 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 Houthi activity, Red Sea rerouting, Hormuz risk and energy-security pressure.

الله أكبر
لا إله إلا الله



United Arab Emirates

SECURITY SITUATION

The UAE remains operationally stable, but the surrounding risk environment remains elevated. The main change is that Hormuz risk has shifted from mine and tanker incidents into a more formal lane-control dispute. Iran’s demand for control of key shipping lanes, combined with the IRGC claim that it stopped three tankers, reinforces that UAE exposure remains maritime and aviation-linked even without direct domestic instability. The UAE should still be treated as resilient, but not normalised.

AVIATION

UAE airspace remains open, but flight operations should be treated as actively managed. Current UAE NOTAMs continue 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, airline cancellations and last-minute operational changes, especially on routes linked to Saudi Arabia, Kuwait, Bahrain, 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. The IRGC claim that it stopped three tankers over alleged violations shows that vessel movement is exposed to route-control enforcement, not only mine risk or general military escalation. 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, mine-risk perception, tanker stoppages and crew-security concerns. Hormuz-linked cargo should not be treated as routine until a transit mechanism becomes operational and stable.

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 lane-control risk, 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 return.



SECURITY SITUATION

Oman's strategic importance has increased again. Iran's position on Hormuz now centres on control of key shipping lanes, including one lane entirely under Iranian control and part of another lane also under Iranian control. This has slowed hopes that Oman could quickly turn talks into a practical de-confliction mechanism. Muscat is trying to balance de-confliction, international passage expectations, its own sovereign position around the Strait, and Iran's demand for lane control. The main risk for Oman is not domestic instability; it is proximity to a route-control dispute that could determine whether Hormuz becomes a practical transit corridor or a managed-access chokepoint.

AVIATION

Oman airspace remains open and continues to support regional rerouting around higher-risk airspace. Muscat FIR remains important because 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. The issue is now more difficult because Iran's position is not only about safe passage; it is about control of key shipping lanes. The claim that three tankers were stopped reinforces that shipping companies and insurers cannot treat the Strait as normal while the lane-control dispute remains unresolved. For Oman, the critical question is whether a recognised and usable transit mechanism can be created without giving Iran a veto over lawful commercial passage. Until that happens, the southern route remains available in principle but politically contested and commercially exposed. Shipping teams should assume elevated war-risk pricing, insurer scrutiny, route checks, VHF monitoring, mine-risk caution, tanker-stoppage risk and heightened reporting requirements.

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.



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.

Bahrain

SECURITY SITUATION

Bahrain remains one of the most sensitive GCC environments. Its exposure has increased further because it is hosting Bahrain Shield, a GCC-wide military exercise from 28–30 July intended to strengthen joint military action, exchange experience and evaluate GCC military systems. The exercise does not automatically mean Bahrain will be targeted, but it does create a visible, time-bound concentration of GCC military activity in a country already exposed through the US Fifth Fleet presence. Iran may interpret Bahrain Shield as a provocation or as a signal of GCC alignment with US military pressure. This raises the risk of air alerts, cyber activity, disinformation, maritime deterrence, public-safety measures and insurance sensitivity even if no direct attack occurs. Bahrain’s structural exposure remains high. It hosts the US Fifth Fleet, has limited strategic depth, depends on maritime routes, and remains vulnerable to air-defence saturation, command-and-control disruption and maritime confidence shocks.

AVIATION

Bahrain aviation remains open but highly sensitive. Recent interception and air-alert activity confirms that Bahrain can move quickly from normal operations to public-safety posture. Bahrain Shield adds another short-term aviation watch item because military activity, airspace management and public-safety signalling may become more sensitive during the exercise window. 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 stoppages, mine-risk perception, war-risk pricing, vessel incidents and insurer restrictions can all affect cargo confidence and delivery windows into Bahrain. Bahrain Shield may also elevate commercial risk perception even without a direct attack. The risk is not only kinetic. Uncertainty itself can raise insurance costs, affect vessel routing and slow cargo decisions. 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 or exercise-related security activity, 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 suspicious objects following interceptions.



SECURITY SITUATION

Qatar remains operationally improved after its maritime navigation resumption, but its strategic exposure remains high. Doha's mediation role remains important as US-Iran talks continue under renewed pressure, while Gulf foreign ministers are coordinating more directly on Hormuz navigation, passage rights, supply continuity and regional security. Qatar's main exposure remains indirect but significant: LNG exports, tanker confidence, Hormuz transit, mediation pressure and air-defence risk. The claim that three tankers were stopped reinforces that Qatar's maritime exposure cannot be reduced simply because local navigation has resumed. LNG confidence depends on whether Hormuz remains commercially usable, insurable and predictable.

AVIATION

Qatar airspace remains open and Hamad International Airport continues to support normal commercial operations. The main aviation risk is indirect but still elevated. If Gulf tensions increase again, 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 local maritime picture has improved because navigation activities have resumed. This remains a positive operational signal.

The strategic risk remains high because Qatar's LNG exports depend on Hormuz confidence. The tanker stoppages and Iran's lane-control demand reinforce that maritime resumption does not equal full normalisation. Any renewed vessel accident, mine incident, 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.

MOVEMENT - SUPPLY CHAIN

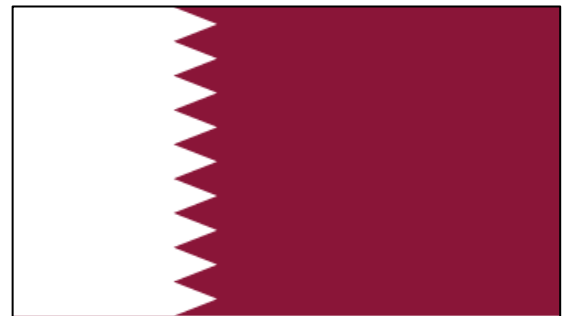
- Qatar's Abu Samra/Salwa crossing with Saudi Arabia remains open and should continue to support passenger movement, road freight and regional contingency access. This route remains important for fallback access to the wider GCC road network.
- Qatar remains operationally stable onshore, but its supply-chain exposure remains tied to LNG exports, air cargo, food security and port operations. 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. Treat maritime resumption as positive but not yet full normalisation.



SECURITY SITUATION

Kuwait remains one of the most exposed GCC environments. Recent power, water, tanker and northern Gulf exposure keeps it inside the severe-risk category, while renewed US pressure, Iraq-linked escalation and Iran’s Hormuz enforcement posture keep Kuwait close to the escalation track. The main concerns remain missile and drone activity, air-defence response, power and water disruption, debris risk, northern Gulf exposure, energy infrastructure vulnerability, Kuwait-Iraq border sensitivity, GPS interference and proximity to Iraq-linked escalation routes. Iraq-linked strike activity adds a further watch item because retaliation from Iraqi-based groups could affect Kuwait’s northern exposure, US-linked facilities or cross-border security environment.

AVIATION

Kuwait aviation should be treated as highly sensitive. Kuwait FIR restrictions and GPS interference concerns remain relevant, and any renewed missile, drone or Iraq-linked 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, mine-risk perception, war-risk pricing, insurer restrictions, tanker availability and possible delays affecting Kuwait-linked cargo. The US blockade remains in effect, and Iran’s lane-control demand creates a new layer of uncertainty for Kuwait-linked cargo. Shipping confidence can be affected quickly by renewed missile activity, US-Iran tensions, vessel redirection, Iranian control claims over Hormuz, tanker stoppages, mine incidents 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 Abdali–Safwan crossing has reopened, but movement through the Iraq border should still be treated as sensitive. 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 until a clean period is established.



Escalation Triggers

RED ACT NOW

- Iran attempts to enforce lane control through kinetic action, warning fire, vessel detention or denial of passage.
- A Gulf-linked LNG terminal, energy port or export facility is hit by drone, missile, sabotage or mine activity.
- Iran-backed groups in Iraq target US, Saudi or GCC diplomatic, military or commercial-linked sites.
- The US or Saudi Arabia resumes or expands major strikes against Iran-linked targets.

AMBER WATCH

- Iran refuses any Hormuz formula that does not give it control over at least one full shipping lane.
- Oman-Iran talks continue without a published or operationally recognised Hormuz transit mechanism.
- Houthi maritime-blockade threats or fee proposals continue against Saudi-linked or South Red Sea shipping.
- Iran bars or threatens vessels linked to companies or countries accepting compensation from frozen Iranian assets.

GREEN IMPROVING

- No further tanker stoppages, mine incidents, seizures or route-enforcement incidents occur in Hormuz.
- Iraq-linked armed groups reduce public threats against Saudi energy infrastructure and diplomatic interests.
- GCC foreign-minister coordination produces practical navigation, supply-flow or de-confliction measures.

Additional watch items

- Iran's lane-control demand and Oman's response.
- US and Saudi strike tempo and whether follow-on strikes occur in Iraq or near Iranian border areas.
- Bahrain Shield exercise activity, Iranian messaging, cyber indicators and air-defence posture.
- Iraq-linked strike fallout, PMF/IAMG retaliation language and possible attacks against US, Saudi or GCC-linked sites.
- Erbil, Harir Air Base, Khor Mor gas field and US-linked facilities in Iraq.
- Iranian threats against companies or countries accepting payments from frozen Iranian assets.
- Saudi Aramco sites, Ghawar, Jubail, Riyadh, Ras Tanura, Yanbu, Jizan, Red Sea export routing and Houthi blockade threats.
- Kuwait power, water, tanker and northern Gulf infrastructure exposure.
- Bahrain public-safety alerts, shelter guidance, air-defence posture and port activity.
- UAE GNSS interference, departure flow controls, flight cancellations and Emirates FIR routing restrictions.
- Qatar maritime-safety guidance, LNG flows and tanker-routing confidence.

Positive confirmation signals

- No further Hormuz tanker stoppages, mine incidents or enforcement actions occur.
- Oman and Iran announce a practical Hormuz transit mechanism acceptable to shipping and insurers.
- GCC states maintain a coordinated position on freedom of navigation and supply continuity.
- US-Iran talks continue without expanded strikes.
- Bahrain Shield concludes without retaliation, air alerts, cyber disruption or maritime escalation.
- Saudi Red Sea routing stabilises without further Houthi attacks, Iraq-linked drone activity or Aramco targeting.
- No further Kuwait power, water, tanker, border or infrastructure attacks for seven days.
- No further Bahrain sirens, air-raid alerts or interception activity.
- Iraq-linked drone activity declines around Erbil, Harir, Khor Mor and Saudi-facing launch corridors.
- War-risk cover remains available for Hormuz, Red Sea and Bab el-Mandeb cargo.
- 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 again. The earlier diplomatic opening has not disappeared, but it is now being challenged by four developments: renewed US and Saudi strike pressure, Iran's demand for control over key Hormuz shipping lanes, the claim that three oil tankers were stopped over alleged violations, and the Iraq-linked escalation pathway affecting Saudi energy security. Together, these show that the region remains in active containment rather than de-escalation. Hormuz is now the decisive political and operational issue. The dispute is no longer only about whether the Strait is open. It is about who controls the lanes, which vessels qualify for passage, whether Iran can deny transit to ships linked to sanctions or frozen-asset compensation, and whether insurers will accept any route as safe. This creates a direct challenge for shipping companies, energy exporters, naval forces and Gulf states. Iraq is now the most important non-GCC spillover arena for Saudi and Kuwait planning. The US-Saudi strikes were geographically broad, and Iran-aligned groups may respond against US facilities, Saudi interests, diplomatic sites, energy infrastructure or logistics routes. The risk is concentrated around militia infrastructure, international facilities, airports and energy sites, but many of these locations sit close to civilian areas. The Abdali-Safwan reopening is positive, but the earlier closure shows Kuwait-Iraq movement remains vulnerable to escalation. Bahrain Shield adds a short-term watch window. The exercise is a useful test of GCC interoperability and collective defence, but it also concentrates attention on Bahrain at a time when Iran is already using asymmetric pressure, maritime deterrence, cyber activity and proxy channels. The most likely concern is not necessarily a direct strike on the exercise itself, but a wider pressure campaign around it: cyber disruption, warning rhetoric, airspace sensitivity, maritime deterrence and insurance escalation. Saudi Arabia's Iraq-linked exposure is now the other major watch item. If IAMGs continue drone attacks against Saudi energy infrastructure or diplomatic interests, further Saudi or US-Saudi retaliatory strikes in Iraq become more likely. That would add a third pressure channel to Saudi Arabia's existing Red Sea/Houthi and Hormuz exposure.

Next 72–96 hours: Watch Hormuz tanker activity, US-Saudi strike tempo, Oman's response to Iran's lane-control demand, Bahrain Shield, Iraq-linked retaliation and Kuwait-Iraq border movement. The immediate indicators are the identity and status of the three tankers reportedly stopped, any new vessel warnings, any US or Saudi follow-on strikes, IAMG retaliation language, Bahrain exercise-related alerts or cyber disruption, activity around Erbil, Harir or Khor Mor, and whether Oman can keep talks active. A second tanker stoppage, confirmed strike expansion, Khor Mor disruption, attack linked to Bahrain Shield or renewed Abdali-Safwan closure would confirm further deterioration.

Next 7–14 days: The key question is whether diplomacy becomes operational or collapses into enforcement. Operators need to see a recognised Hormuz transit process, no further tanker stoppages, no expansion of the US blockade into broader commercial disruption, no further Saudi energy or Iraq-linked incidents, no Bahrain Shield-related retaliation, no new Kuwait or Bahrain alerts, and no renewed disruption to Kuwait-Iraq crossings. If those indicators align, risk may stabilise at high but managed exposure. If they do not, the region remains in active containment with severe maritime and proxy risk.

Next month: The most likely scenario is active containment with a contested maritime regime and a rising proxy layer. Gulf states will try to keep airports, ports and land borders open while coordinating on freedom of navigation and supply continuity. Oman will remain central to any Hormuz mechanism. Qatar will remain exposed through LNG and mediation. Saudi Arabia will balance Red Sea, Iraq-linked and Hormuz exposure. Bahrain will remain highly exposed because of US Fifth Fleet presence and GCC defence activity. The UAE will remain operationally resilient but exposed to aviation and maritime route management. Kuwait remains a sensitive indicator for direct GCC spillover, Iraq-linked escalation and northern Gulf exposure.

Planning baseline: Treat the region as open but unstable, with Hormuz enforcement and proxy pressure now the primary drivers. Operational movement can continue, but posture should remain elevated until six indicators align: no further tanker stoppages occur; Oman-Iran talks produce a practical mechanism; US-Iran talks continue without expanded strikes; Bahrain Shield concludes without retaliation; Saudi Red Sea and Iraq-linked exposure stabilises; and Kuwait and Bahrain record no further alerts, border disruptions or infrastructure incidents.

Saudi Arabia — Iraq-linked drone risk, Houthi pressure and Red Sea/Hormuz exposure raise risk — **HIGH**

Kuwait — Power/water infrastructure, tanker, Abdali-Safwan and northern Gulf exposure keep Kuwait severe — **SEVERE**

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

Oman — Iran's lane-control demand makes Oman central to Hormuz de-confliction — **HIGH**

Bahrain — Bahrain Shield, recent interceptions and US-linked profile keep exposure severe — **SEVERE**

Qatar — Maritime resumption helps, but LNG, safety guidance and Hormuz exposure remain 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.

IMPORTANT NOTICE & DISTRIBUTION

Operational status — airspace, border crossings and routes — can change without notice; confirm before moving people or goods. Please verify Aviation, maritime and or land border crossing risk against official NOTAMs before operational decisions. Nothing here is financial, legal or insurance advice. Distribution is restricted to authorised recipients; do not forward without written authorisation.



Global Situational Awareness

www.globalsitu.com



Disclaimer

This report produced by Global Situational Awareness is for general information purposes only within the specified area as defined within the report and/or maps provided as part of the report. All reasonable efforts have been made to ensure that material contained herein is correct. However, no express or implied warranty is given and no responsibility for the accuracy or completeness of the material is accepted by Global Situational Awareness. The content does not in any way constitute any assurance against threats or risk. Clients are advised not to rely solely on this information when making any decision. Clients should seek specific specialist advice before making any decision. This report is for the benefit of the client only and may not be disclosed in part or in whole to any third parties without the prior written consent of Global Situational Awareness Senior Leadership Team. Unless otherwise specifically noted. Sharing of this report or the information within may result in a material breach of any contract between Global Situational Awareness and the recipient of the report.