

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

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Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

The GCC remains in active containment, with diplomacy gaining momentum but Hormuz, Omani waters and energy infrastructure still exposed.

■ The GCC remains in active containment, with diplomacy gaining momentum but Hormuz, Omani waters and energy infrastructure still exposed. Current reporting indicates a more balanced operating picture. The immediate risk of major US or Israeli strikes on Iran has eased after President Trump said the US and Israel would hold off on attacks in hope of a quick deal. Saudi Arabia is also pressing directly for restraint, while Qatar, Kuwait and Iran are engaged in regional contact aimed at stabilising the situation.

This is a meaningful diplomatic opening, but not operational de-escalation. Iranian-linked reporting says Hormuz will remain shut until the US ends hostile actions, while Iran’s acting defence minister says every threat from adversaries is being treated as real and credible. Iran’s foreign minister has also warned that US or Israeli aggression would be met with a decisive response. That keeps Gulf energy infrastructure, ports, refineries, pipelines, desalination, power generation and offshore assets inside the active watch picture. The energy track now has two sides. OPEC says Saudi Arabia, Kuwait, Oman and other countries have decided to adjust production, which may help manage market pressure. At the same time, any Hormuz disruption, Gulf of Oman vessel incident or strike threat against regional energy infrastructure could quickly reverse that stabilising effect.

Hormuz and the Gulf of Oman remain the central maritime triggers. A tanker was struck by an unknown projectile off Oman, with engine-room damage reported. This follows earlier tanker stoppages, mine-risk reporting, lane-control disputes and blockade enforcement. The practical issue is still whether vessels can transit Hormuz and adjacent Omani waters without being exposed to route-control disputes, projectile attacks, insurance restrictions or military escalation. The Iraq track remains important but has shifted slightly toward containment. Iraq’s Prime Minister has ordered measures to prevent attacks on neighbouring countries, which is positive for Saudi Arabia, Kuwait and the UAE. However, militia retaliation risk has not disappeared. Iraq remains an active spillover arena, especially around drone activity, PMF/IAMG networks, Erbil, Harir, Khor Mor and routes leading towards Kuwait and Saudi Arabia.

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

PLANNING ASSUMPTION

Plan for active containment with a stronger diplomatic track but continued maritime, energy and proxy risk. Movement remains possible across most of the GCC, but posture should stay elevated until strikes remain paused, Hormuz reopens or stabilises, no further vessel incidents occur in Omani waters, Iran lowers energy-threat language, Iraq prevents cross-border attacks, and Kuwait/Bahrain record no further alerts or infrastructure incidents.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	SEVERE	HIGH	HIGH	► WATCH	US-linked posture and recent air-defence sensitivity keep Bahrain severe despite diplomatic movement.
Kuwait	SEVERE	HIGH	HIGH	► WATCH	Northern Gulf exposure, infrastructure vulnerability and Iraq-border sensitivity keep Kuwait severe.
Qatar	HIGH	HIGH	HIGH	► WATCH	Mediation activity is positive, but LNG and Hormuz-linked tanker risk remain high.
UAE / Dubai	HIGH	MODERATE	HIGH	► WATCH	Operationally stable, but GNSS interference, flow controls and Hormuz exposure remain active.
Saudi Arabia	HIGH	MODERATE	HIGH	▲ WORSENING	Saudi restraint helps, but energy threats, Houthi pressure and Iraq-linked risk remain elevated.
Oman	HIGH	HIGH	HIGH	▲ WORSENING	Tanker projectile incident and Hormuz proximity keep Omani maritime exposure high.

RISK SCALE LOW MODERATE HIGH SEVERE CRITICAL



GCC
Gulf Cooperation Council

Saudi Arabia

SECURITY SITUATION

Saudi Arabia remains domestically steady, and its diplomatic role has become more important. Riyadh is pressing directly for restraint, with the Crown Prince stressing to President Trump the need for all efforts to avert a wider regional conflict. Saudi-Iranian ministerial contact is also a positive signal and supports the view that Riyadh wants to contain escalation rather than widen it. However, Saudi Arabia remains exposed through three pressure channels: Iranian energy-infrastructure threats, Houthi/Red Sea activity and Iraq-linked drone risk. Iran’s reported identification of Gulf energy facilities as possible retaliation targets keeps Saudi petroleum infrastructure in the watch picture. Iraq-linked armed groups also remain relevant because previous drone activity against Saudi energy infrastructure created a cross-border escalation pathway. The Houthi and Red Sea issue remains active. Even where there is no immediate confirmed attack, Bab el-Mandeb pressure, Red Sea routing concerns and threats against Saudi-linked shipping continue to affect energy confidence, insurance and export planning. Priority monitoring areas include Eastern Province, Riyadh, Dammam, Ras Tanura, Jubail, Ghawar, Yanbu, Jizan, Jeddah Islamic Port, Red Sea approaches, southern-border areas, Iraq-linked launch corridors, energy infrastructure, diplomatic sites and high-footfall commercial locations.

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. Saudi routes remain usable, but operators should not plan on fully routine assumptions while regional strike and energy-infrastructure threats remain active.

MARITIME

Saudi maritime exposure remains 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 Red Sea/Houthi angle remains important because threats against Saudi-linked shipping create a second maritime pressure point while Hormuz remains contested. The Iraq-linked risk layer also remains relevant because retaliatory drone activity could target petroleum infrastructure or associated logistics. Ras Tanura, Jubail, Ghawar, Yanbu, Jizan, 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 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 immediate strike threat has eased, but Iran’s warning to regional states not to assist US attacks means the UAE should remain in a watch posture. Any perception that Gulf territory, airspace, logistics, refuelling or infrastructure is supporting US or Israeli operations could raise the threat level.

The UAE’s main exposure remains maritime and aviation-linked. Hormuz is still contested, and the tanker projectile incident off Oman reinforces that the Gulf of Oman and approaches to Fujairah remain sensitive. Energy, port, aviation, data-centre and logistics infrastructure should remain in continuity planning.

AVIATION

UAE airspace remains open, but flight operations should be treated as actively managed. UAE NOTAMs have continued 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 have also affected 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 and the Gulf of Oman remain the key exposures. The tanker projectile incident off Oman shows that vessel movement remains exposed to direct maritime security incidents, not only political route-control disputes.

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 is still exposed to Hormuz sentiment, insurer caution, vessel availability, war-risk pricing, mine-risk perception, projectile incidents and crew-security concerns. Hormuz-linked cargo should not be treated as routine until maritime incidents stop and a recognised transit mechanism is in place.

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 uncertainty, Gulf of Oman incidents, Red Sea risk, 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 exposure has worsened after a tanker was struck by an unknown projectile off Oman, with engine-room damage reported. This confirms that Oman’s risk is not only diplomatic or proximity-based; it is now directly tied to vessel security in the Gulf of Oman and the approaches to Hormuz.

Oman remains central to any maritime de-confliction track, but the tanker incident shows that talks alone are not reducing operational risk yet. Muscat is still trying to balance de-confliction, international passage expectations, its own sovereign position around the Strait and Iran’s demand for influence over shipping arrangements. The main risk for Oman is not domestic instability; it is proximity to a contested maritime corridor where vessel incidents can occur despite diplomatic activity.

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 and the Gulf of Oman remain Oman’s main operational and geopolitical exposures. The tanker projectile incident reinforces that the shipping environment remains high risk, even while US strikes are paused and talks continue.

For shipping companies, the issue is now a combined risk picture: projectile attacks, route-control disputes, mine-risk perception, blockade enforcement and insurance restrictions.

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, projectile risk 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, Gulf of Oman transits, 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. Treat the Gulf of Oman as an active maritime-risk area until vessel incidents stop.



SECURITY SITUATION

Bahrain remains one of the most sensitive GCC environments. Bahrain Shield has concluded, which removes the immediate exercise window, but the country remains highly exposed because of the US Fifth Fleet presence, recent air-defence activity, limited strategic depth and proximity to Gulf military movement.

Iran’s warning to regional states against assisting US attacks matters for Bahrain because Manama’s US-linked security posture makes it one of the most exposed GCC states in any renewed strike cycle. 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, cyber pressure, disinformation and executive travel restrictions.

Priority monitoring areas include Sheikh Isa Air Base, naval and port facilities, government sites, diplomatic locations, military-linked facilities, airport areas, residential compounds and high-footfall commercial locations.

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. Even after Bahrain Shield, airspace management, military activity and public-safety signalling remain sensitive because of the US-linked security environment.

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 incidents, mine-risk perception, war-risk pricing, vessel incidents and insurer restrictions can all affect cargo confidence and delivery windows into Bahrain.

Commercial risk perception remains important even without a direct attack. 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 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 stable, but its strategic exposure remains high. Doha’s mediation role remains important as US-Iran talks continue, and the cancellation of planned strikes gives Qatar and other mediators more room to keep the diplomatic track alive.

However, Qatar remains exposed through LNG exports, tanker confidence, Hormuz transit, mediation pressure and air-defence risk. Iran’s warning to regional states against assisting US attacks also matters for Qatar because any perception of support from regional bases could affect threat calculations, even if Doha continues to position itself as a mediator.

Qatar’s local maritime picture has improved since navigation activities resumed, but that does not remove strategic exposure. 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 remains improved, but strategic maritime exposure is still high. Qatar’s LNG exports depend on Hormuz confidence, tanker availability and insurer approval.

The tanker incident off Oman reinforces that local maritime resumption does not equal full normalisation. Any renewed vessel accident, projectile strike, 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 full normalisation.



SECURITY SITUATION

Kuwait remains one of the most exposed GCC environments. The immediate strike threat has eased, but Kuwait remains exposed through northern Gulf geography, power and water infrastructure vulnerability, Iran-linked energy threats, Iraq-border sensitivity and proximity to militia activity.

Iraq's Prime Minister ordering measures to prevent attacks on neighbouring countries is a positive signal for Kuwait. However, it does not remove the risk that Iraqi-based groups, hardline factions or disputed launch activity could affect Kuwait's northern exposure, US-linked facilities or cross-border movement.

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. Security planning should remain elevated around government sites, diplomatic locations, military-linked facilities, power and water infrastructure, ports, airports, offshore assets, residential compounds, high-footfall commercial areas and Kuwait-Iraq movement corridors.

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, projectile or mine-risk perception, war-risk pricing, insurer restrictions, tanker availability and possible delays affecting Kuwait-linked cargo.

The US blockade and Iran's lane-control position remain relevant, and shipping confidence can be affected quickly by renewed missile activity, US-Iran tensions, vessel redirection, Iranian control claims over Hormuz, tanker stoppages, projectile 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, treat Kuwait-Iraq movement as sensitive even where crossings are open, 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

- A Gulf-linked LNG terminal, energy port, refinery, pipeline, desalination plant or export facility is hit by drone, missile, sabotage, projectile or mine activity.
- The US or Israel resumes planned strikes against Iran.
- Iran-backed groups in Iraq target US, Saudi, Kuwaiti, UAE or other GCC-linked diplomatic, military, energy or commercial sites.
- Iran attempts to enforce lane control through kinetic action, warning fire, vessel detention or denial of passage.

AMBER WATCH

- US and Israel keep strike plans paused, but military assets remain positioned for rapid escalation.
- Iran continues to warn regional states against assisting US attacks. Iranian media or officials continue naming Gulf or Israeli energy facilities as possible retaliation targets.
- Oman-Iran talks continue without a published or operationally recognised Hormuz transit mechanism.
- Iraq announces measures to prevent attacks on neighbours, but militia threats or drone activity continue.

GREEN IMPROVING

- No further tanker stoppages, projectile incidents, mine incidents, seizures or route-enforcement incidents occur in Hormuz or Omani waters.
- Oman-Iran talks produce a recognised Hormuz transit mechanism that does not trigger US or GCC rejection.
- Iraq demonstrates effective control over launch corridors and prevents further cross-border drone activity.

Additional watch items

- Whether US-Iran talks resume and whether they produce a written framework.
- Whether the proposed Hormuz reopening becomes operational, not only political language.
- Iran's energy-target list and whether Gulf facilities are named directly or indirectly.
- US and Israeli force posture, including refuelling aircraft movements and strike readiness.
- Saudi-Iran ministerial contact and whether it produces restraint language.
- Iraq's measures to prevent attacks on neighbouring countries and whether militias comply.
- Erbil, Harir Air Base, Khor Mor gas field and US-linked facilities in Iraq.
- Abdali-Safwan crossing status, Kuwait-Iraq road movement and border security measures.
- Kuwait power, water, tanker and northern Gulf infrastructure exposure.
- 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

- US-Iran talks resume and remain active.
- No further Hormuz or Gulf of Oman vessel incidents occur.
- US and Israeli strikes remain paused while talks continue.
- Oman and Iran announce a practical Hormuz transit mechanism acceptable to shipping and insurers.
- Iran stops threatening regional energy infrastructure.
- Iraq prevents further cross-border drone activity against Gulf states.
- Saudi-Iran communication continues and produces visible restraint.
- 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.
- 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 remains unstable, but the diplomatic window has widened. The cancellation of planned US strikes, cautious optimism around the possible resumption of US-Iran talks, and Saudi Arabia's direct push for restraint reduce the immediate risk of a major strike cycle. This is an important shift for GCC planning because Saudi Arabia, Kuwait, Bahrain, Qatar, Oman and the UAE all remain exposed to any renewed US-Iran escalation. This should be treated as a pause with opportunity, not de-escalation.

Iran continues to warn regional states against supporting US attacks, and reported retaliation planning still places Gulf energy infrastructure in the watch picture. The risk will fall only if talks resume, strike plans remain suspended, Iran softens its threat language, and Iraq prevents further cross-border attacks. Hormuz and the Gulf of Oman remain the decisive maritime issues. Trump's comments suggest a deal could reopen the Strait of Hormuz, but the operational test is whether vessels, insurers and naval forces recognise a safe transit mechanism. The tanker projectile incident off Oman confirms that maritime risk remains active even while talks continue. The issue is no longer only whether the Strait is open. It is whether vessels can transit without being struck, stopped, redirected, denied passage or priced out by war-risk insurance.

Iraq remains the most important non-GCC spillover arena for Saudi and Kuwait planning. Baghdad's order to prevent attacks on neighbouring countries is positive, but the risk will only fall if drone activity and militia threats decline in practice. Erbil, Harir, Khor Mor, US-linked facilities, Saudi-facing launch corridors and Kuwait-Iraq movement routes remain key watch items. Bahrain's immediate exercise window has passed, but its strategic exposure remains severe. The US Fifth Fleet presence, limited geographic depth and recent air-defence sensitivity mean Bahrain remains one of the fastest-moving alert environments in the GCC if the strike track resumes.

Next 72–96 hours: Watch whether US-Iran talks resume, whether planned strikes remain cancelled, and whether Saudi-Iran contact continues. The immediate indicators are the status of the tanker struck off Oman, any new vessel warning, Iranian naming of Gulf energy targets, Iraqi action against launch corridors, and any renewed drone activity towards Saudi Arabia, Kuwait, the UAE or US-linked sites.

Next 7–14 days: The key question is whether the diplomatic opening becomes operational restraint. Operators need to see no further vessel incidents in Hormuz or Omani waters, no renewed US or Israeli strike action, no Iranian move against Gulf energy infrastructure, visible Iraqi control over cross-border drone threats, and continued Saudi-Iran contact. If these indicators align, risk may stabilise at high but managed exposure. If they do not, the region remains in active containment with severe maritime and energy-infrastructure risk.

Next month: The most likely scenario is active containment with a contested maritime regime and a persistent proxy layer. Gulf states will try to keep airports, ports and land borders open while coordinating on freedom of navigation, energy continuity and de-confliction. 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 while pushing restraint. Bahrain will remain highly exposed because of the US Fifth Fleet presence. 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 a stronger diplomatic opening but continued maritime, energy and proxy risk. Operational movement can continue, but posture should remain elevated until talks resume, strikes remain paused, no further vessel incidents occur in Hormuz or Omani waters, Iran stops threatening regional energy infrastructure, Iraq prevents cross-border attacks, and Kuwait/Bahrain record no further alerts, border disruption or infrastructure incidents.

Saudi Arabia — Restraint efforts help, but energy threats, Iraq-linked risk and Red Sea/Hormuz exposure remain high — **HIGH**

Kuwait — Power/water infrastructure, Iraq-border sensitivity and northern Gulf exposure keep Kuwait severe — **SEVERE**

UAE — Operationally stable but exposed to Hormuz, GNSS disruption, aviation management and energy threats — **HIGH**

Oman — Tanker projectile incident and Hormuz proximity raise Omani maritime exposure — **HIGH**

Bahrain — US-linked profile and recent air-defence sensitivity keep Bahrain severe — **SEVERE**

Qatar — Diplomacy 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.

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