

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

10 Aug 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

The GCC remains in active containment, with a clearer diplomatic pathway emerging through the Strait of Hormuz but Saudi energy-infrastructure risk worsening and the Yemen theatre becoming more active.

■ The regional picture remains mixed. Hormuz diplomacy has strengthened further, with Iran and Oman moving towards agreement on new navigation arrangements and Washington signalling that full reopening of the Strait could provide a pathway towards ending the wider US-Iran conflict even without an immediate nuclear agreement. This is potentially significant for Gulf energy flows, Qatar LNG, UAE/Fujairah logistics, Oman's diplomatic role and wider shipping confidence. However, this is not yet operational de-escalation. Iran continues to distinguish agreement on new navigation routes from the full reopening of Hormuz, while wider political conditions remain unresolved. The test remains whether any arrangement becomes a recognised, usable and insurable transit mechanism accepted by Iran, Oman, the US, GCC states, naval forces, shipping companies and insurers. Meanwhile, the physical security environment has deteriorated around Saudi Arabia and Yemen. Saudi authorities extinguished a fire at an Aramco facility in Jizan following a Houthi-claimed drone attack. Separate reporting of an explosion and fires around Jubail remains unconfirmed and should not yet be treated as a confirmed hostile incident. However, the combination increases concern that Saudi energy infrastructure could again become a direct target alongside Saudi-linked shipping in the Red Sea. Yemen is also becoming more active, with renewed fighting, government strikes against Houthi positions, explosive drones intercepted over Marib and attacks affecting Mocha.

For the GCC, the risk is therefore increasingly divided between diplomatic progress and continuing kinetic activity. Hormuz may provide the clearest route towards wider de-escalation, but commercial normalisation requires safe vessel movements rather than political announcements alone. Saudi Arabia now faces simultaneous Red Sea, Yemen, energy-infrastructure and Iraq-linked exposure. Oman remains central to negotiations but directly exposed through Hormuz and the Gulf of Oman. The UAE remains operationally resilient but exposed through maritime traffic, Fujairah and aviation management. Qatar remains dependent on LNG transit confidence. Kuwait and Bahrain remain severe because of northern Gulf exposure, infrastructure, sensitivity and US-linked security posture.

Saudi Arabia — Worsening — **SEVERE**

Kuwait — Watch — **SEVERE**

UAE — Watch — **HIGH**

Oman — Watch — **HIGH**

Bahrain — Watch — **SEVERE**

Qatar — Watch — **HIGH**

PLANNING ASSUMPTION

Plan for active containment with a credible but incomplete diplomatic off-ramp through Hormuz, alongside worsening Saudi energy-infrastructure and Yemen risk. Movement remains possible across most of the GCC, but posture should stay elevated until Hormuz reopening becomes operational and commercially accepted, vessels transit without attack or coercion, Saudi energy infrastructure records a sustained attack-free period, Yemen escalation subsides, Iraq prevents further cross-border attacks and no renewed major US or Israeli strike cycle develops.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	SEVERE	HIGH	HIGH	► WATCH	US-linked posture, regional military activity and air-defence sensitivity keep Bahrain severe despite diplomatic movement.
Kuwait	SEVERE	HIGH	HIGH	► WATCH	Northern Gulf exposure, infrastructure vulnerability and Iraq-linked launch risk keep Kuwait severe.
Qatar	HIGH	HIGH	HIGH	► WATCH	Diplomacy is positive, but LNG exports and Hormuz-linked tanker confidence remain exposed.
UAE / Dubai	HIGH	MODERATE	HIGH	► WATCH	Operationally stable, but Hormuz, Fujairah, GNSS and maritime exposure remain active.
Saudi Arabia	HIGH	MODERATE	HIGH	▲ WORSENING	Houthi pressure has expanded from Saudi-linked shipping towards Saudi energy infrastructure.
Oman	HIGH	HIGH	HIGH	► WATCH	Hormuz talks are progressing, but full reopening and commercially recognised transit remain unresolved.

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 materially. Saudi authorities extinguished a fire at an Aramco facility in Jizan following a Houthi-claimed drone attack. This moves the threat beyond recent Houthi pressure against Saudi-linked tankers and Red Sea access and places Saudi energy infrastructure directly back within the active risk picture. Separate reporting of an explosion and fires around Jubail remains unconfirmed, and the incident should not yet be treated as a confirmed attack. However, confirmation would materially increase concern around Eastern Province energy and industrial infrastructure. Saudi Arabia remains exposed through three connected pressure channels: Houthi missile and drone activity from Yemen, Houthi pressure against Saudi-linked shipping and Red Sea access, and potential Iraq-origin drone activity affecting northern or Eastern Province approaches. Yemen is also becoming more active, with government strikes against Houthi positions, explosive drones intercepted over Marib and attacks affecting Mocha. Riyadh continues to support regional restraint, but the security environment around the Kingdom is moving in the opposite direction. Priority monitoring areas include Jizan, Yanbu, Jeddah Islamic Port, Bab el-Mandeb, Eastern Province, Dammam, Ras Tanura, Jubail, Ghawar, southern-border areas, Iraq-linked launch corridors, energy infrastructure and major 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: southern Saudi exposure to Yemen-based missile and drone activity, Eastern Province infrastructure sensitivity, Iraq-linked escalation and wider northern Gulf escalation tied to Iran. The main aviation exposure remains indirect: interception activity, debris, warning alerts, airline caution, rerouting pressure, fuel-cost volatility, short-notice NOTAM activity and diversion planning if Gulf, Iraq, Yemen or Iran-linked conditions change. Saudi routes remain usable, but operators should not plan on fully routine assumptions while regional strike and infrastructure threats remain active.

MARITIME

Saudi maritime exposure remains high across both the Red Sea and Hormuz. The Red Sea remains the sharper persistent concern because Houthi activity has targeted Saudi-linked tankers and Yemen's western coastline remains an active military environment. The threat affects Saudi crude exports, tanker confidence, Yanbu-linked routing, Suez access, war-risk pricing, crew-security planning and insurer appetite. Hormuz diplomacy could improve conditions around Ras Tanura and Jubail, but agreement on navigation routes does not yet mean unrestricted reopening. Saudi maritime planners should therefore continue treating Red Sea and Hormuz exposure as simultaneous operating theatres. Ras Tanura, Jubail, Yanbu, Jizan, Jeddah Islamic Port, Bab el-Mandeb and Hormuz-linked tanker routes remain priority 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 remains maritime, energy and confidence-linked disruption. Cargo planners should maintain buffers for fuel pricing, customs delays, driver availability, insurance review, tanker availability and maritime rerouting. Businesses dependent on Saudi energy or petrochemical production should monitor Jizan and Jubail developments closely and avoid assuming regional logistics have normalised simply because 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, Bab el-Mandeb and Iraq-linked routes, and review staff-accountability procedures. Maintain resilience plans for water, fuel, power and essential supplies. Monitor Jizan and Jubail developments closely. pressure.

الله أكبر
لا إله إلا الله
محمد رسول الله



United Arab Emirates

SECURITY SITUATION

The UAE remains operationally stable, but the surrounding risk environment remains elevated. The emerging Hormuz diplomatic off-ramp is positive because commercially recognised reopening would support Jebel Ali, Khalifa Port, Fujairah, energy logistics, insurance confidence and wider Gulf cargo flows. However, the UAE should remain in a watch posture. Hormuz is not yet normalised, and attacks against commercial vessels demonstrate that diplomacy and kinetic maritime activity continue simultaneously. The Gulf of Oman also remains sensitive, while worsening Red Sea and Yemen risk can affect cargo moving between Asia, the Gulf, Suez and European markets. The UAE’s main exposure remains maritime and aviation-linked rather than domestic instability. Energy, port, aviation, data-centre and logistics infrastructure should remain within continuity planning until Hormuz passage becomes commercially predictable and regional vessel attacks decline.

AVIATION

UAE airspace remains open, but flight operations should continue to be treated as actively managed. GNSS signal interference within Emirates FIR remains relevant, including possible spoofing and jamming. Aircraft may experience unreliable navigation signals and may need alternative navigation procedures, with anomalies reported to ATC.

Regional military activity and flow-control measures can also affect selected departures and onward routes, particularly where flights interact with neighbouring FIRs. Continued US combat-air activity and the possibility of renewed Iran-related escalation reinforce the need for flexible routing.

This does not mean UAE aviation is closed or unsafe. Passenger travel, executive movement and time-sensitive cargo should nevertheless allow for rerouting, departure-slot delays, routing restrictions, airline cancellations and last-minute operational changes, particularly 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 diplomacy is positive for the UAE, but commercial shipping remains exposed to projectile risk, insurer caution, vessel availability, crew-security concerns and route uncertainty.

A political navigation agreement should not be treated as full normalisation until vessels can transit repeatedly without attack, detention, forced diversion or commercially restrictive conditions. Red Sea deterioration also matters because UAE-linked cargo moving between Asia, the Gulf and Suez may face rerouting, higher war-risk pricing and schedule uncertainty. Fujairah and Gulf of Oman routes should remain priority monitoring areas.

MOVEMENT - SUPPLY CHAIN

- UAE land connectivity remains open through the Saudi border at Ghuwaifat/Al Batha and Oman crossings, including Hatta/Al Wajajah and Khatmat Malaha. These routes should remain primary resilience channels for overland passenger movement, road freight and contingency relocation 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 management keep Gulf-linked cargo vulnerable. Maintain Saudi and Oman land-route options for urgent movement if maritime or aviation conditions deteriorate.

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 remains central to the Hormuz diplomatic track. Negotiations with Iran over new navigation arrangements are progressing and appear to be approaching a final technical stage. The emerging possibility that full reopening of Hormuz could provide a wider US-Iran diplomatic off-ramp increases Muscat's importance further. However, agreement on maritime routes does not automatically mean full reopening. Iran continues to attach wider conditions, and commercial acceptance remains unresolved.

Oman's exposure therefore remains high. The country's principal risk is not domestic instability; it is proximity to a maritime corridor where diplomacy, shipping, insurance, Iranian leverage and US military pressure are operating simultaneously. Musandam remains particularly important because of its proximity to the Strait and southern transit route. Oman is both the diplomatic channel most capable of facilitating de-escalation and one of the coastal states most exposed to failure, disputed implementation or renewed vessel attacks.

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 risks remain 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, Yemen activity, Musandam security developments or wider regional military movement.

MARITIME

Hormuz remains Oman's main strategic exposure. Diplomatic momentum has improved, but the operational test is whether any arrangement becomes recognised by shipping companies, insurers, Iran, Oman, the US, GCC states and naval forces.

Until that happens, transit remains 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. Full reopening would provide a significant stabilisation signal, but repeated safe vessel transits are required before normalisation can be assumed.

Oman also remains exposed through the Gulf of Oman. Omani waters, Musandam approaches and Gulf of Oman transits should remain active maritime-risk areas until vessel incidents cease and agreed arrangements operate without dispute.

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 remains maritime rather than domestic. 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 passenger and freight movement if maritime conditions deteriorate or transit arrangements fail to produce commercially reliable passage.

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. Track whether the Hormuz route becomes an operationally recognised mechanism, not only a political announcement.



Bahrain

SECURITY SITUATION

Bahrain remains one of the most sensitive GCC environments. Bahrain Shield has concluded, removing 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.

Diplomatic movement around Hormuz is positive for Bahrain because a wider US-Iran de-escalation would reduce the immediate risk of another major strike cycle. However, Bahrain’s US-linked security posture means it remains one of the most exposed GCC states if negotiations fail. Iranian warnings concerning states assisting future US operations reinforce this sensitivity. The main risk is not only direct attack. Regional military activity can rapidly 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 routine operations to a public-safety posture. Continued US military activity and unresolved Iran tensions mean airspace management and public-safety signalling remain sensitive despite diplomatic movement.

Executive travel, staff rotations and time-sensitive cargo should not be planned on fully 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, vessel attacks, mine-risk perception, war-risk pricing and insurer restrictions can all affect cargo confidence and delivery windows into Bahrain.

Commercial risk perception remains important even without a direct incident. Uncertainty itself can raise insurance costs, affect vessel routing and delay cargo decisions. A workable Hormuz reopening would improve conditions, but port users should continue confirming 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 heightened military activity, avoid unnecessary movement around sensitive facilities, pre-identify safe assembly points and maintain rapid cross-border relocation options into Saudi Arabia. Confirm transport availability before any time-sensitive relocation.

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, and its mediation role remains important as the Hormuz diplomatic track develops. Increased Oman-Qatar engagement reinforces Doha’s role within wider Gulf efforts to contain escalation. A commercially workable reopening of Hormuz would be particularly positive because LNG confidence depends on the Strait remaining usable, insurable and predictable.

However, Qatar remains exposed through LNG exports, tanker confidence, mediation pressure and regional air-defence risk. Iran’s distinction between agreement on navigation routes and full reopening means LNG planners should not assume unrestricted transit is imminent. Qatar’s local maritime environment remains comparatively stable, but strategic exposure remains high. LNG confidence ultimately depends on whether Hormuz becomes operationally stable rather than only politically negotiated.

AVIATION

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

Maintain diversion planning, monitor regional airspace updates and allow for schedule changes if Kuwait, Bahrain, Iran, Iraq or Hormuz-linked tensions increase. Continued military activity across the region means time-sensitive movement should retain flexibility even while Qatar’s own aviation system remains operational.

MARITIME

Qatar’s local maritime picture remains stable, but strategic exposure remains high because LNG exports depend on Hormuz confidence, tanker availability and insurer approval.

The diplomatic track is positive, and full reopening could materially improve the outlook. However, maritime resumption does not equal normalisation. Any renewed projectile strike, mine incident, warning-fire event, seizure threat, forced redirection, insurance restriction or attack near Hormuz could quickly affect tanker availability and market confidence even if Qatari infrastructure remains secure. Repeated safe transit is therefore the principal confirmation signal.

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 supply-chain exposure remains tied to LNG exports, air cargo, food security and port operations. Build cargo-delay buffers, monitor LNG and tanker movements, verify insurer conditions, maintain Qatar–Saudi land-route options and review air-cargo contingency plans if Gulf airspace warnings increase or Hormuz negotiations fail to produce commercially reliable passage.

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 from earlier peaks, but Kuwait remains vulnerable through northern Gulf geography, power and water infrastructure, Iran-linked threats, Iraq-border sensitivity and proximity to militia activity. The Hormuz diplomatic track is positive because an operational reopening would reduce pressure on northern Gulf shipping and energy confidence. However, Kuwait remains vulnerable if negotiations fail, vessel incidents continue or Iraq-linked activity resumes. Iraqi authorities have reported disrupting a network possessing drones and allegedly preparing attacks. This is a positive indicator, but one disrupted network does not demonstrate that wider launch capability has been removed. The main concerns remain missile and drone activity, air-defence response, power and water disruption, debris risk, energy infrastructure vulnerability, Kuwait-Iraq border sensitivity, GPS interference and proximity to Iraq-linked escalation routes. Security planning should remain elevated around government and diplomatic locations, military-linked facilities, utilities, ports, airports, offshore assets, residential compounds and Kuwait-Iraq movement corridors.

AVIATION

Kuwait aviation should continue to be treated as highly sensitive. Kuwait FIR restrictions and GPS interference concerns remain relevant, and renewed missile, drone or Iraq-linked activity could 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 a sustained period develops without missile, drone, GPS, airspace, power, water or infrastructure disruption and Baghdad demonstrates continued control over cross-border launch activity.

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 necessarily port closure, but vessel caution, projectile or mine-risk perception, war-risk pricing, insurer restrictions, tanker availability and delays affecting Kuwait-linked cargo. A recognised Hormuz reopening would materially improve Kuwait's position, but shipping confidence can still deteriorate quickly through renewed missile activity, vessel redirection, Iranian control claims, tanker stoppages or insurance tightening. Commercial normalisation requires sustained vessel transit without attack or coercive restrictions, not solely agreement on a new route.

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 remain 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 remain sensitive. Do not route staff or time-sensitive cargo through the Iraq border without official confirmation, written movement authority and security review. Recent Iraqi counter-network activity is encouraging but does not yet justify relaxed assumptions. Movement planning should account for temporary restrictions, alerts, 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

- Another confirmed strike hits Saudi energy, petrochemical, port, power or aviation infrastructure following the Jizan incident.
- Another vessel sinks or suffers major damage off Yemen, Bab el-Mandeb, Hormuz or the Gulf of Oman.
- Iraq-linked groups target US, Saudi, Kuwaiti, UAE or other GCC-linked diplomatic, military, energy or commercial sites.
- Major US or Israeli strikes against Iran resume.

AMBER WATCH

- Houthi threats or attacks continue against Saudi energy infrastructure or Saudi-linked shipping.
- A Hormuz navigation route is announced but full reopening remains unresolved.
- Yemen missile, drone or ground activity continues around Marib, Mocha or southern front lines.
- Israeli preparations for unilateral strikes remain active despite diplomatic progress.

GREEN IMPROVING

- No further Saudi energy-infrastructure or tanker attacks occur.
- US and Israeli strikes remain paused as diplomacy progresses.
- Hormuz reopening terms are announced and implemented without immediate dispute.

• Additional watch items

- Terms of any Hormuz arrangement and whether restrictions or Iranian lane control remain disputed. Whether the Iran-Oman route becomes operationally recognised by insurers, shipping companies and naval forces.
- Whether full Hormuz reopening follows agreement on navigation lanes.
- US conditions for ending major hostilities and Iran's response.
- Further Houthi threats against Saudi energy infrastructure. Houthi activity around Mocha, Marib and Ad Dali.
- Saudi Red Sea export routing, Yanbu, Jizan and Jeddah tanker scheduling.
- UKMTO/JMIC threat ratings for the Red Sea, Bab el-Mandeb, Hormuz and Gulf of Oman.
- Iraqi action against drone networks and launch corridors.
- Iranian threat language towards GCC states hosting US forces.
- Qatar LNG flows and tanker confidence.
- Kuwait power, water, northern Gulf and Iraq-border exposure.
- Bahrain air-defence posture, public-safety alerts and US-linked military activity.

Positive confirmation signals

- Hormuz reopening terms are implemented without immediate dispute.
- Repeated commercial transits occur without attack, detention or forced diversion.
- War-risk cover remains available for Hormuz, Red Sea and Bab el-Mandeb cargo.
- No further attacks occur against Saudi energy infrastructure.
- No further Houthi attacks occur against Saudi-linked tankers.
- Saudi Red Sea routing stabilises without further attacks.
- US and Israeli strikes remain paused while talks continue.
- Iran reduces threats against regional energy infrastructure and GCC states.
- Iraq disrupts additional drone networks and prevents cross-border launches.
- Yemen fighting returns to lower intensity.
- No further Kuwait infrastructure or border incidents occur.
- No further Bahrain sirens, air alerts or interception activity occur.
- 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 a more credible pathway towards de-escalation has emerged. Hormuz diplomacy is progressing, with Iran and Oman moving towards agreement on navigation arrangements and Washington signalling that full reopening of the Strait could potentially provide a pathway towards ending major US-Iran hostilities even without an immediate nuclear agreement. This is positive for Gulf energy flows, Qatar LNG, UAE/Fujairah logistics, Oman's diplomatic role and wider market confidence. However, political progress has not yet produced operational normalisation. Iran continues to distinguish agreement on navigation routes from full reopening of Hormuz, while commercial shipping still requires predictable passage, insurer acceptance and an end to vessel attacks or coercive redirection. Hormuz is therefore simultaneously the GCC's principal maritime vulnerability and its clearest potential mechanism for wider de-escalation.

Saudi Arabia has moved in the opposite direction. The Houthi-claimed attack against the Jizan Aramco facility follows pressure against Saudi-linked tankers and reinforces that Saudi exposure is no longer only maritime. The still-unconfirmed Jubail incident also requires close monitoring because confirmation of hostile activity would demonstrate potential pressure against strategic infrastructure on both sides of the Kingdom. Yemen itself is becoming more active through renewed fighting, drone activity and attacks affecting Mocha and other fronts.

The key question is whether diplomatic progress around Hormuz can begin reducing the wider military risk faster than Saudi and Yemen-related escalation develops. For operators, the answer is not yet. Diplomatic negotiation, military deterrence and proxy escalation continue simultaneously.

Next 72–96 hours: Watch Hormuz and Saudi Arabia in parallel. The principal diplomatic indicator is whether Iran and Oman formally announce new navigation arrangements and whether Tehran moves beyond route agreement towards commercially usable reopening. Watch whether the emerging US position becomes a workable de-escalation formula. For Saudi Arabia, monitor Jizan, confirmation or denial of Jubail and any further Houthi attacks against energy infrastructure or shipping. Monitor Yemen for additional missile, drone and ground activity around Marib, Mocha and southern front lines. Also watch US regional military activity, Iranian threats towards GCC states and Israeli preparations for potential unilateral action.

Next 7–14 days: The central Saudi question is whether Jizan remains an isolated escalation or marks the beginning of a renewed Houthi campaign against strategic infrastructure. A second confirmed strike against an Aramco, petrochemical, port, airport, power or water facility would represent a significant deterioration. The second issue is whether Baghdad can convert the disruption of one drone network into broader control over Iraq-origin activity. Hormuz requires evidence of implementation: vessels transiting, insurers providing cover, attacks stopping and navigation instructions becoming predictable.

Next month: The most likely scenario remains active containment, but with a more plausible diplomatic route towards reducing the US-Iran confrontation. Hormuz may move towards an operational transit mechanism and potentially become the trigger for wider de-escalation. The Red Sea and Yemen are less likely to stabilise as quickly. Saudi Arabia will remain the GCC state facing the most dynamic deterioration because it is exposed to Houthi attacks from the south, Red Sea maritime pressure and possible Iraq-linked activity from the north. Oman will remain central to Hormuz de-confliction. The UAE will remain operationally resilient but exposed through Fujairah, Hormuz, aviation and commercial shipping. Qatar will remain dependent on LNG transit confidence. Kuwait and Bahrain remain key indicators of direct GCC spillover.

Planning baseline: Treat the GCC as open but unstable, with a credible diplomatic route towards wider de-escalation but no operational normalisation yet. Saudi energy-infrastructure risk is worsening, Yemen is becoming more active and Hormuz remains contested. Operational movement can continue, but posture should remain elevated until full Hormuz reopening occurs, commercial shipping demonstrates sustained safe passage, Saudi energy infrastructure records a sustained attack-free period, Iraq controls cross-border launch networks, Yemen escalation subsides and the wider US-Iran military cycle demonstrably winds down.

Saudi Arabia — Energy-infrastructure attacks, Red Sea pressure and multi-directional drone exposure — **SEVERE**

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

UAE — Operationally resilient but exposed through Hormuz, Fujairah and regional aviation — **HIGH**

Oman — Hormuz diplomacy progressing, but reopening and maritime transit risk remain unresolved — **HIGH**

Bahrain — US-linked profile and regional military sensitivity keep Bahrain severe — **SEVERE**

Qatar — Diplomacy helps, but LNG 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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