

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

13 Aug 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

The GCC remains in active containment, but maritime risk has worsened across both Hormuz and Bab el-Mandeb as peace efforts stall, shipping traffic remains severely depressed and a deadly Houthi attack confirms the Red Sea as an active casualty-producing threat.

The regional picture has deteriorated since the previous assessment. Optimism around a near-term Hormuz settlement has weakened, with Iran saying there has been no progress towards reviving the interim US-Iran arrangement and no discussions on extending the previous ceasefire framework. Pakistan and other mediators continue to indicate that some form of agreement may remain possible, but Tehran and Washington are still publicly divided over implementation, sanctions, frozen assets, the US blockade and reopening the Strait. President Donald Trump says the US has “total control” of Hormuz, but commercial traffic remains at a small fraction of pre-war levels. This should not be interpreted as operational normalisation. Military enforcement is also increasingly part of the maritime environment. US forces disabled a Panama-flagged cargo vessel in the Gulf of Oman after it attempted to proceed towards an Iranian port despite the US blockade. This reinforces that commercial shipping now faces risk from competing Iranian and US enforcement regimes around Hormuz and the Gulf of Oman. For shipping companies and insurers, political claims of control are less important than whether vessels can transit predictably without attack, interception, detention or forced diversion. The Red Sea has deteriorated more sharply. A Houthi attack on the commercial vessel Tihamah in Bab el-Mandeb killed crew members and Yemeni rescuers and injured others. The fatalities confirm that renewed Houthi operations are no longer only disrupting shipping but again producing direct loss of life. The IMO has reinforced its call for protection of seafarers and thorough voyage-risk assessment before transit. Commercial traffic through Bab el-Mandeb remains below earlier levels, while Saudi crude movements from Yanbu are increasingly operating with reduced AIS visibility or being redirected northwards because of the Houthi threat. Saudi Arabia consequently remains the principal GCC deterioration point. The threat now combines Houthi attacks against Saudi-linked shipping, the recent attack against the Jizan refinery, pressure around Red Sea export routes and continuing concern over potential Iraq-linked attacks. The Mecca Joint Defense Agreement with Türkiye and Pakistan adds an important longer-term deterrence framework, and Ankara has indicated that its vision could extend beyond the three founding states. However, the agreement has not yet changed the immediate operational threat environment.

- 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 sustained two-chokepoint maritime disruption, stalled US-Iran diplomacy and elevated Saudi Red Sea exposure. Movement remains possible across most of the GCC, but posture should stay elevated until Hormuz traffic recovers materially, US and Iranian maritime enforcement eases, Bab el-Mandeb attacks stop, Saudi energy and shipping targets record a sustained attack-free period, Iraq prevents further cross-border launches and Kuwait records no follow-on terrorism 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, high-risk Gulf airspace and unresolved US-Iran confrontation keep Bahrain severe.
Kuwait	SEVERE	HIGH	HIGH	► WATCH	Northern Gulf exposure remains severe, while the foiled ISIS plot adds a domestic critical-infrastructure threat.
Qatar	HIGH	HIGH	HIGH	► WATCH	LNG and Hormuz exposure remain high as maritime traffic stays severely below normal levels.
UAE / Dubai	HIGH	MODERATE	HIGH	► WATCH	Operationally resilient, but Hormuz, Gulf of Oman, aviation and maritime-enforcement risks remain active.
Saudi Arabia	HIGH	MODERATE	HIGH	▲ WORSENING	Deadly Red Sea attacks, reduced shipping visibility and Houthi pressure keep Saudi exposure severe.
Oman	HIGH	HIGH	HIGH	► WATCH	Diplomatic channels remain active, but Hormuz and Gulf of Oman traffic remain heavily militarised.

RISK SCALE LOW MODERATE HIGH SEVERE CRITICAL



GCC
Gulf Cooperation Council

Saudi Arabia

SECURITY SITUATION

Saudi Arabia remains domestically steady, but its external exposure continues to deteriorate. The recent Houthi attack against the Jizan refinery remains an important indicator that energy infrastructure has returned to the active threat picture, while Houthi pressure against Saudi-linked shipping continues in the Red Sea. The deadly attack on Tihamah in Bab el-Mandeb further demonstrates that the southern maritime corridor is now an active casualty-producing environment rather than primarily a disruption and insurance problem. Saudi crude movements from Yanbu are increasingly adapting to this environment. Tankers have reduced AIS visibility during some movements, while Saudi crude is also being redirected northwards through the Red Sea towards Suez and the SUMED system. These adaptations preserve export capacity but demonstrate that the security threat is materially changing normal commercial behaviour. Saudi Arabia therefore remains exposed through Houthi missile and drone activity, Red Sea maritime pressure, energy-infrastructure targeting and potential Iraq-origin attacks. The Mecca Joint Defense Agreement with Türkiye and Pakistan strengthens Saudi Arabia's longer-term strategic position. Ankara has indicated that the agreement's vision could eventually extend beyond the three members, while the signatories continue to present it as defensive rather than directed at one specific state.

AVIATION

Saudi aviation exposure remains elevated because missile, drone and air-defence activity can affect routes with little warning. Operators should monitor southern Saudi exposure to Yemen, Eastern Province infrastructure sensitivity, Iraq-linked launch corridors and wider Gulf escalation connected to Iran. The principal aviation risks remain interception activity, debris, GNSS disruption, short-notice NOTAM changes, airline caution, rerouting pressure, fuel-planning changes and temporary route restrictions. The wider regional aviation environment remains sensitive because military aircraft, missiles, drones and air-defence systems continue to operate across overlapping areas.

MARITIME

Saudi maritime exposure is now severe across the Red Sea and remains high around Hormuz. The fatal attack on Tihamah demonstrates the life-safety consequences of Houthi operations in Bab el-Mandeb. Commercial traffic remains reduced, and operators are modifying routes, insurance arrangements and vessel-tracking practices in response.

Saudi Red Sea exports are adapting through reduced AIS visibility and increased northbound routing from Yanbu towards Suez and SUMED. These measures help maintain crude flows but increase voyage complexity and demonstrate that the traditional southern Red Sea route cannot be treated as routine. War-risk costs, crew willingness, insurer appetite, vessel availability and schedule reliability remain under pressure.

Hormuz remains a second strategic exposure. US claims of control have not restored normal commercial traffic, while Iranian restrictions and US blockade enforcement continue simultaneously. Saudi maritime planners should therefore maintain a two-theatre approach covering Yanbu, Jizan, Jeddah, Bab el-Mandeb, Ras Tanura, Jubail and Hormuz-linked routes.

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, Kuwait–Saudi routes and Jordan–Saudi crossings remain important regional resilience channels.
- The main supply-chain exposure is increasingly maritime. Cargo planners should maintain buffers for war-risk insurance, fuel pricing, vessel availability, schedule changes, customs delays, driver availability and Red Sea or Gulf rerouting.
- Energy and petrochemical supply chains require particular attention because changes to Saudi crude routing can create secondary congestion, tanker-positioning and scheduling effects even where production itself remains stable. Avoid treating continued cargo movement as evidence that normal conditions have returned.

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.

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محمد رسول الله



United Arab Emirates

SECURITY SITUATION

The UAE remains operationally resilient, but its external risk environment remains elevated. Hormuz has not moved towards the operational normalisation anticipated in earlier assessments. Iran says there has been no progress towards restoring the interim arrangement with Washington, while US claims of control over the Strait contrast with commercial traffic remaining at a small fraction of pre-war levels. The UAE is consequently exposed through two overlapping maritime dynamics: continued Iranian restrictions and attacks around Hormuz, and increasingly kinetic US enforcement of its blockade against Iranian ports. The disabling of a commercial vessel in the Gulf of Oman demonstrates that military enforcement risk extends beyond the narrow Strait itself. Reduced US diplomatic staffing across parts of the region also reinforces that Washington continues to assess the wider operating environment as elevated despite its more assertive military posture.

AVIATION

UAE aviation remains highly sensitive to the regional military environment. International conflict-zone guidance continues to identify Emirates FIR as high risk because of the potential use of missiles, drones, combat aircraft and air-defence systems associated with the US-Iran confrontation. GNSS interference also remains relevant, including possible spoofing and jamming. Operators should expect the possibility of short-notice airspace instructions, routing adjustments, departure-slot changes and restrictions affecting onward movement through neighbouring FIRs. Passenger travel, executive movement and time-sensitive cargo should maintain strong contingency planning. Commercial activity may continue under national airspace management, but operators should verify current NOTAMs, airline status and applicable national guidance immediately before movement rather than relying on standing assumptions. Passenger travel, executive movement and time-sensitive cargo should maintain strong contingency planning. Commercial activity may continue under national airspace management, but operators should verify current NOTAMs, airline status and applicable national guidance immediately before movement rather than relying on standing assumptions.

MARITIME

UAE ports remain critical regional logistics assets, but Hormuz and the Gulf of Oman remain highly exposed. Commercial traffic through the Strait is still severely below pre-war levels despite US claims of control, demonstrating that military dominance does not automatically produce commercially accepted safe passage.

The Gulf of Oman has also become part of the enforcement environment after US forces disabled a commercial vessel attempting to reach an Iranian port. This introduces additional risk around vessel identification, routing, warnings, inspection and potential interception.

Fujairah, Jebel Ali and Khalifa Port therefore remain operationally important but connected to a maritime system characterised by high insurance costs, limited vessel confidence and unpredictable military interaction. Hormuz-linked cargo should not be treated as routine until repeated safe transit and insurer acceptance are demonstrated.

MOVEMENT - SUPPLY CHAIN

- UAE land connectivity remains an important resilience advantage. The Saudi border at Ghuwairat/Al Batha and Oman crossings including Hatta/Al Wajajah and Khatmat Malaha should remain primary alternatives for urgent passenger movement and road freight.
- The main supply-chain vulnerability remains maritime and aviation-linked rather than domestic road movement. Continued disruption in both Hormuz and Bab el-Mandeb also creates risk for cargo moving between Asia, the Gulf, Suez and Europe.
- Cargo planners should maintain buffers for vessel delays, insurance review, air-freight disruption and rerouting. Keep UAE–Saudi and UAE–Oman road alternatives available for critical personnel and goods 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 regional diplomatic efforts, but the Hormuz track has lost momentum. Iran says there has been no progress towards reviving the interim US-Iran arrangement and insists that Washington must return to previous commitments before wider implementation can resume. Pakistan, Qatar and other mediators remain active, but no agreed timetable for restoring full commercial passage has emerged.

Oman therefore remains positioned between diplomacy and increasingly militarised maritime enforcement. Musandam and the northern Omani coast sit immediately beside the contested Strait, while the Gulf of Oman has become an operational enforcement zone for the US blockade of Iranian ports.

The disabling of a commercial vessel by US forces in the Gulf of Oman reinforces that Omani exposure is not limited to Iranian missile, drone or maritime activity. Shipping now operates between competing enforcement regimes, each capable of producing detention, diversion or kinetic action.

Oman’s principal threat remains external rather than domestic. Musandam, Sohar, northern coastal waters, Gulf of Oman approaches and Hormuz-linked traffic remain priority monitoring areas.

AVIATION

Oman airspace remains strategically important to regional routing, but the western Gulf of Oman portion of Muscat FIR remains exposed to the military risk surrounding Hormuz and US-Iran operations.

Operators should monitor NOTAMs, regional military movements, routing links with UAE and Saudi airspace, GNSS interference and possible changes connected to maritime incidents.

Flight planning should retain high levels of contingency and fuel flexibility. Commercial operations should not assume that improving diplomatic rhetoric will translate immediately into reduced aviation risk, particularly while military enforcement and commercial vessel incidents continue in adjacent waters.

MARITIME

Hormuz remains Oman’s dominant strategic exposure, but the challenge has shifted from negotiating the geography of new routes towards determining who can enforce and commercially legitimise passage.

US claims of total control contrast with maritime traffic remaining severely depressed. Iran continues to condition reopening on US actions, while Washington is kinetically enforcing its blockade against Iranian ports. The Gulf of Oman is therefore directly connected to the broader contest rather than functioning as a low-risk approach zone.

Shipping teams should maintain elevated war-risk assumptions, route checks, VHF monitoring, mine-risk awareness, insurer consultation and heightened reporting procedures. Repeated safe commercial passage, rather than political declarations from either Washington or Tehran, remains the key indicator required before maritime risk can be downgraded.

MOVEMENT - SUPPLY CHAIN

- Oman–UAE land crossings remain central resilience routes for passenger movement, road freight and contingency access between Muscat, Sohar, Buraimi, Hatta and the wider UAE logistics network.
- Oman’s principal supply-chain exposure remains maritime. Hormuz-linked cargo, Gulf of Oman movements, tanker scheduling, marine insurance and crew-security planning continue to face uncertainty.
- Keep UAE land routes available for urgent movements and maintain buffers for maritime cargo. Sohar and other Omani logistics facilities may become increasingly important to regional contingency planning, but their maritime approaches remain exposed to the same wider security environment.

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 because of the US Fifth Fleet presence, limited strategic depth and proximity to the continuing US-Iran maritime confrontation.

US claims of control over Hormuz and increasingly active enforcement of the blockade against Iranian ports reinforce Bahrain’s strategic relevance. The main risk is that renewed US-Iran escalation could again place US-linked military facilities and host states within Iran’s threat calculus.

Diplomatic channels remain active through Pakistan, Qatar and other intermediaries, but Tehran says there has been no progress towards restoring the previous interim agreement. The absence of a clear ceasefire-extension process means Bahrain cannot assume that military risk is declining.

Reduced staffing across US diplomatic missions in parts of the Middle East also provides an additional indicator of continuing caution. Priority monitoring areas include Sheikh Isa Air Base, naval facilities, port areas, government and diplomatic locations, military-linked infrastructure, Bahrain International Airport, residential compounds and high-footfall commercial locations.

AVIATION

Bahrain aviation remains highly sensitive. Current international conflict-zone guidance identifies Bahrain FIR as high risk because unpredictable military developments may involve missiles, drones, combat aircraft and air-defence systems.

This risk can change quickly even without a direct attack on Bahrain. Regional military activity can trigger airspace restrictions, diversions, airline cancellations, public-safety alerts and executive travel restrictions.

MARITIME

Bahrain’s ports remain linked to the wider Gulf risk environment. Hormuz traffic remains severely below normal, while Iranian restrictions and US enforcement activity continue to affect vessel confidence and insurer appetite.

The main commercial threat is not necessarily closure of Bahraini ports. Wider Gulf uncertainty can delay vessel schedules, increase war-risk costs, reduce carrier willingness and affect delivery windows.

Port users should confirm vessel schedules, insurer approval, cargo timing and crew-security arrangements before critical movements. A genuine reduction in Bahrain’s maritime exposure requires sustained safe Hormuz passage rather than claims by either side that the Strait is under control.

MOVEMENT - SUPPLY CHAIN

- The King Fahd Causeway remains Bahrain’s primary resilience link with Saudi Arabia. It should remain central to passenger movement, freight support, staff relocation, medical evacuation planning and contingency access to the wider GCC road network.
- Routine road movement can continue under prevailing controls, but staff-accountability and relocation planning should remain current. During heightened regional military activity, avoid unnecessary presence near sensitive facilities and confirm transport availability before initiating time-sensitive cross-border movement.
- The Causeway remains particularly important if aviation or maritime conditions change suddenly.

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 through Hormuz continues. Doha retains an important mediation role alongside Pakistan and other intermediaries, although Iran says there has been no progress towards restoring the interim agreement with Washington.

This weakens expectations of a rapid return to normal LNG transit. Commercial traffic through Hormuz remains severely below pre-war levels, demonstrating that claims of military control have not yet restored tanker confidence.

Qatar's primary vulnerabilities remain LNG exports, marine insurance, tanker availability and possible airspace spillover from renewed US-Iran military activity. Domestic conditions remain comparatively stable, but the strategic importance of Qatar's energy exports means maritime developments can have immediate commercial implications even without direct attacks on Qatari infrastructure.

AVIATION

Qatar aviation remains exposed to the wider Gulf conflict environment. International conflict-zone guidance continues to identify Doha FIR as high risk because of possible missiles, drones, combat aircraft and air-defence activity. The principal aviation threat remains indirect: regional escalation can produce rerouting, delays, NOTAM changes, restrictions or fuel-planning adjustments with little notice.

Executive travel, passenger movements and time-sensitive air cargo should retain diversion planning and schedule flexibility. Monitor Bahrain, Kuwait, Iran, Iraq and Hormuz-linked developments closely and confirm applicable guidance immediately before movement rather than assuming continuity from previous operating conditions.

MARITIME

Qatar's strategic maritime exposure remains high because LNG exports depend on predictable access through Hormuz.

Traffic remains at a fraction of normal levels, while Iran continues to restrict passage and Washington is enforcing a blockade against Iranian ports. US claims of control therefore do not yet translate into commercially normal navigation. The key indicators for Qatar remain tanker availability, insurer acceptance, absence of attacks or interceptions and sustained vessel transit. Pressure from major Asian energy importers for safe navigation without additional costs also reinforces the importance of avoiding disputed tolls, service charges or other restrictions that could affect Qatar-linked shipping.

Maritime resumption should only be considered normalisation after sustained safe and commercially accepted passage.

MOVEMENT - SUPPLY CHAIN

- The Abu Samra/Salwa crossing with Saudi Arabia remains Qatar's principal road-based resilience link to the wider GCC.
- Domestic supply chains remain broadly resilient, but LNG exports, air cargo, port operations and food-security logistics remain exposed to wider Gulf disruption.
- Build cargo-delay buffers, monitor LNG and tanker movements, verify insurer conditions and maintain Qatar-Saudi land-route alternatives. Critical supply-chain planning should account for simultaneous disruption affecting Hormuz and Bab el-Mandeb, particularly for goods moving between Asia, the Gulf and European markets.

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 GCC’s most exposed environments because of northern Gulf geography, infrastructure vulnerability, proximity to Iraq and the continuing US-Iran confrontation.

A new domestic-security dimension has emerged after Kuwaiti authorities disrupted an alleged ISIS plot targeting a vital facility and arrested a suspect. The successful intervention demonstrates effective counterterrorism capability, but the case is important because it introduces terrorist intent against critical infrastructure alongside Kuwait’s existing missile, drone and external security exposure. The precise facility should not be assumed beyond official reporting that a vital installation was targeted. Security teams should therefore use the incident as a trigger to review access control, suspicious-activity reporting, contractor and visitor procedures and protection around essential infrastructure without treating the disruption as evidence of a wider active campaign. Externally, Kuwait remains sensitive to Iraq-linked activity, Iranian threats, northern Gulf shipping conditions and US military operations. Priority monitoring areas include government and diplomatic locations, power and water infrastructure, energy facilities, airports, ports, offshore assets, military-linked sites, residential compounds and Kuwait-Iraq movement corridors.

AVIATION

Kuwait aviation remains highly sensitive. International conflict-zone guidance continues to identify Kuwait FIR as high risk because military activity involving missiles, drones, combat aircraft and air-defence systems can develop unpredictably.

Northern Gulf geography and proximity to Iraq increase Kuwait’s exposure to both direct activity and spillover. GNSS disruption also remains an operational concern. Passenger travel, executive movement and air cargo should proceed only after confirming current flight status, NOTAMs and applicable national guidance. Kuwait should remain one of the most closely monitored GCC aviation environments until there is a sustained period without missile, drone, airspace or infrastructure disruption.

MARITIME

Kuwait’s maritime exposure remains high because northern Gulf access ultimately depends on wider confidence in Hormuz.

Shipping traffic through the Strait remains dramatically below normal levels, while competing Iranian and US enforcement activity continues. The main Kuwait-linked threat is therefore not necessarily port closure but vessel caution, war-risk pricing, insurer restrictions, tanker availability and schedule disruption. Claims that Hormuz is under military control should not be treated as equivalent to safe commercial passage. Kuwait-linked shipping requires predictable transit, absence of attacks or interceptions and insurer confidence before normal maritime assumptions can resume.

MOVEMENT - SUPPLY CHAIN

- Kuwait-Saudi crossings, including Nuwaisib and Salmi, remain the primary overland resilience routes for passenger traffic, freight, urgent logistics and southbound contingency relocation.
- Movement through the Iraq border should remain sensitive. Do not route staff or time-sensitive cargo through Iraq without current confirmation, written movement authority and appropriate security review.
- The foiled ISIS plot adds a further requirement to review access controls at logistics and infrastructure sites. Maintain contingency stocks and three-day resilience planning for power, water, fuel, communications and essential supplies while both external and domestic security pressures remain elevated.

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 Houthi attack kills seafarers, sinks a commercial vessel or causes major casualties in Bab el-Mandeb or the Red Sea.
- Major US or Israeli strikes against Iran resume and trigger retaliation against GCC territory or US-hosting states.
- US or Iranian maritime enforcement causes civilian fatalities or produces a direct state-to-state military exchange around Hormuz or the Gulf of Oman.
- A terrorist attack succeeds against a Kuwaiti vital facility or another GCC critical-infrastructure target.

AMBER WATCH

- Further Saudi-linked vessels reduce AIS visibility or substantially alter Red Sea routes because of Houthi threats.
- Pakistan, Qatar or Oman report diplomatic progress but Tehran and Washington remain divided over implementation.
- US blockade enforcement produces additional vessel interceptions or disabling actions.
- The Mecca Joint Defense Agreement expands or moves towards operational implementation during the continuing conflict.

GREEN IMPROVING

- Hormuz commercial traffic rises materially and remains sustained.
- Bab el-Mandeb traffic recovers and no further Houthi attacks occur. No further attacks occur against Saudi shipping or energy infrastructure.
- Iran and the US agree a clear implementation timetable covering maritime passage and blockade arrangements.

Additional watch items

- Hormuz daily vessel counts and direction of travel.
- Iranian restrictions on commercial transit and US-backed routes.
- US blockade enforcement and further vessel interceptions.
- Status of indirect US-Iran talks through Pakistan, Qatar and other mediators.
- Insurer recognition of any future Hormuz transit arrangement.
- Bab el-Mandeb commercial traffic and Houthi targeting patterns.
- Investigation and casualty details from the Tihamah attack.
- IMO and maritime-industry guidance following the fatal Red Sea incident.
- Saudi Yanbu export patterns and reduced AIS visibility.
- Saudi crude movements towards Suez and SUMED.
- Jizan, Yanbu, Jeddah and Red Sea energy infrastructure.
- Expansion or operationalisation of the Mecca Joint Defense Agreement.
- Türkiye-Egypt discussions and possible wider regional security coordination.
- US diplomatic staffing levels across GCC states.

Positive confirmation signals

- Hormuz traffic rises consistently towards normal commercial levels.
- US and Iranian maritime enforcement eases.
- A clear US-Iran implementation framework is announced and observed.
- Commercial vessels transit Hormuz repeatedly without interference.
- No further fatal or serious attacks occur in Bab el-Mandeb.
- Red Sea vessel traffic begins recovering.
- Saudi Red Sea exports stabilise without further attacks or forced routing changes.
- No further attacks occur against Jizan or other Saudi energy infrastructure.
- War-risk cover becomes more widely available at lower cost.
- Iraq prevents further cross-border drone activity.
- No follow-on terrorism cases affect Kuwaiti critical infrastructure.
- US diplomatic staffing begins normalising.
- GCC aviation restrictions ease and high-risk advisories are reduced.
- GCC land borders remain open and functioning under standard controls.

Look Ahead

The regional outlook has deteriorated because the two principal maritime chokepoints affecting GCC trade and energy flows are now simultaneously impaired. Hormuz remains heavily restricted despite US claims of control, while the fatal Houthi attack in Bab el-Mandeb demonstrates that Red Sea shipping again faces direct life-safety risk. Diplomatic activity continues, but it has not translated into an agreed implementation framework or restored commercial confidence.

Hormuz is increasingly characterised by competing enforcement systems rather than a functioning safe-passage mechanism. Iran continues to condition reopening on US actions, while Washington is actively enforcing its blockade against Iranian ports and has demonstrated willingness to disable non-compliant commercial vessels. Commercial traffic remains dramatically below pre-war levels. The result is a maritime environment in which claims of military control coexist with continued commercial avoidance. The Red Sea has simultaneously become more dangerous. The Tihamah attack killed seafarers and rescuers, while Houthi pressure is already changing Saudi crude-export behaviour. Reduced AIS visibility, altered tanker routes and greater use of northbound Suez/SUMED pathways demonstrate that the maritime threat is affecting operating patterns even where exports continue. Saudi Arabia therefore remains the most dynamic GCC deterioration point. The country faces Houthi pressure against shipping and energy infrastructure while also monitoring Iraq-linked threats. The Mecca Joint Defense Agreement creates a potentially important strategic response, particularly if additional states eventually participate, but the pact has not yet produced an observable reduction in immediate threat activity. Kuwait now carries an additional domestic-security concern following the disruption of an alleged ISIS plot against a vital facility. The successful counterterrorism operation is reassuring, but it reinforces the importance of infrastructure protection alongside existing missile, drone and utility resilience.

Next 72–96 hours: Watch Hormuz and Bab el-Mandeb in parallel. The primary Hormuz indicators are commercial vessel counts, additional US blockade-enforcement actions, Iranian restrictions and whether Pakistan, Qatar or other mediators can produce a concrete US-Iran implementation framework rather than competing claims of progress. The immediate Red Sea indicator is whether the fatal Tihamah attack is followed by another Houthi operation against commercial shipping or Saudi-linked vessels. Türkiye's foreign minister is due in Egypt on 13–14 August. Watch whether Ankara-Cairo discussions develop the wider regional-security architecture emerging around Saudi Arabia, Türkiye and Pakistan, particularly regarding Red Sea security and possible expansion of defence coordination.

Next 7–14 days: The central question is whether maritime disruption becomes structurally embedded across both chokepoints. For Hormuz, operators need to see sustained growth in commercial traffic, fewer interceptions and attacks, insurer acceptance and an agreed mechanism between Washington and Tehran. If traffic remains at only a small fraction of normal despite US claims of control, commercial risk should remain elevated regardless of military assessments. For the Red Sea, the key indicator is whether the fatal Tihamah attack produces further carrier withdrawals, increased war-risk pricing and additional Saudi routing changes. Continued Houthi targeting would reinforce northbound Saudi crude diversions and could further reduce Bab el-Mandeb traffic.

Next month: The most likely scenario remains active containment with prolonged dual-chokepoint disruption. Hormuz is unlikely to return rapidly to pre-war commercial patterns unless Washington and Tehran move from indirect mediation to a clearly implemented maritime arrangement. Military control alone is insufficient because shipping decisions are ultimately driven by risk, insurance, crew safety and commercial predictability. Bab el-Mandeb is also likely to remain contested. The return of fatalities substantially raises the threshold for carrier and insurer confidence and could prolong reduced traffic even if no further vessel is sunk.

Planning baseline: Treat the GCC as open but unstable, with stalled diplomacy and worsening two-chokepoint maritime risk. Operational movement can continue, but posture should remain elevated until Hormuz traffic recovers materially, US and Iranian maritime enforcement eases, commercial vessels transit without attack or interception, Bab el-Mandeb attacks cease, Saudi Red Sea and energy targets remain attack-free, Iraq controls cross-border launch networks, Kuwait records no follow-on terrorism incidents and regional aviation-risk guidance begins to ease.

Saudi Arabia — Deadly Red Sea attacks, energy-infrastructure pressure and altered crude routing — **SEVERE**

Kuwait — Northern Gulf and infrastructure exposure compounded by a disrupted ISIS plot — **SEVERE**

UAE — Operationally resilient but exposed through Hormuz, Gulf of Oman and aviation risk — **HIGH**

Oman — Central to diplomacy but directly exposed to competing Hormuz enforcement regimes — **HIGH**

Bahrain — US-linked profile and unresolved US-Iran military confrontation keep risk severe — **SEVERE**

Qatar — Stable domestically but LNG and aviation exposure remain tied to Hormuz disruption — **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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