

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

20 August 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

We assess with moderate confidence that the regional security environment remains elevated and volatile but does not currently indicate a return to sustained, region-wide conflict. The pattern of fragmented de-escalation identified in prior assessments continues to hold, though Iranian signalling points to a possible future lowering of the threshold for direct military action.

Iran's latest warning targets the Gulf states, not just the UAE or Strait of Hormuz shipping.

Tehran's armed forces have signalled that any regional support for US military operations including aircraft, aerial refuelling, or use of bases could be treated as direct participation in the conflict. Host state territory, airspace, and infrastructure are now part of Iran's threat calculus. While the UAE is the current flashpoint, the message applies across the GCC. Iran is using military pressure to push Gulf states toward neutrality, warning that support for Washington risks retaliation.

Iranian Armed Forces Chief of Staff Major General Ali Abdollahi's warning to Gulf states carries more weight than a standard deterrence statement: he explicitly framed any assistance or facilitation to US forces as equivalent to direct participation in operations against Iran and grounded that warning in specific observed activity the presence of military aircraft, particularly refuelling tankers, at regional bases arguing this could not plausibly occur without host-government knowledge.

That detail matters. By naming enabling infrastructure rather than combat platforms, Tehran signals it is tracking the full support chain fuel, basing, airspace access, likely ISR and air-defence coordination not just kinetic launches. This is a deliberate widening of the target logic: Iran is telling Gulf capitals that neutrality is not established by declaratory statements alone but is being actively assessed against observable military footprint.

Critically, no threshold has been defined. Tehran has left open where passive hosting ends and "participation" begins and that vagueness is functional, not accidental. A draft Iranian bill would formally place management, monitoring, and vessel inspection in the Strait of Hormuz under the authority of Iran's Armed Forces General Staff converting what has so far been asserted through military practice into codified domestic law and giving Tehran a standing legal basis to control access, set fees, and vet traffic through the waterway.

COUNTRY RISK ASSESSMENTS

Saudi Arabia — Worsening — **SEVERE**

Kuwait — Watch — **SEVERE**

UAE — Worsening — **SEVERE**

Oman — Watch — **HIGH**

Bahrain — Watch — **SEVERE**

Qatar — Watch — **HIGH**

PLANNING ASSUMPTION

The UAE currently sits at the centre of tensions, but Iran's message is aimed at the whole GCC. Through military pressure, Tehran is trying to force a kind of regional neutrality on Gulf states signalling that any support given to Washington could draw retaliation.

Two additional escalation pathways warrant close monitoring alongside the Gulf maritime picture. We assess that limited maritime and proxy pressure remains the most likely near-term trajectory; however, the combined effect of Iran's increasingly assertive posture, deterioration in Lebanon, and renewed Houthi activity has increased the overall risk of wider escalation relative to the previous reporting period.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	SEVERE	HIGH	HIGH	► WATCH	US-linked posture and unresolved US-Iran confrontation keep Bahrain severe despite no major new direct incident.
Kuwait	SEVERE	HIGH	HIGH	► WATCH	Northern Gulf exposure, infrastructure vulnerability and Iraq-linked threats continue to keep Kuwait severe.
Qatar	HIGH	HIGH	HIGH	► WATCH	Near-standstill Hormuz traffic materially increases Qatar’s LNG and tanker-access exposure.
UAE / Dubai	HIGH	MODERATE	HIGH	► WATCH	Repeated attacks against ADNOC-operated tankers increase direct UAE-linked maritime exposure.
Saudi Arabia	HIGH	MODERATE	HIGH	▲ WORSENING	Hormuz disruption and Houthi pressure on Bab el-Mandeb increasingly constrain both Saudi maritime outlets.
Oman	HIGH	HIGH	HIGH	► WATCH	Musandam and Gulf of Oman exposure remain high as Hormuz traffic falls towards commercial standstill.

RISK SCALE LOW MODERATE HIGH SEVERE CRITICAL



GCC
Gulf Cooperation Council

Saudi Arabia

SECURITY SITUATION

Saudi Arabia remains domestically stable, but its external risk environment continues to deteriorate. The Kingdom is increasingly exposed through simultaneous pressure against its eastern and western maritime approaches. Hormuz remains severely disrupted, while Houthi restrictions around Bab el-Mandeb are now affecting the principal alternative route for Saudi crude exports from Yanbu. No Saudi oil shipments were recorded transiting Bab el-Mandeb on Sunday, reinforcing that Houthi pressure is materially changing Saudi export behaviour rather than merely increasing insurance costs. This follows previous Houthi attacks against Saudi-linked tankers and the recent attack against the Aramco facility in Jizan. The combined threat now includes commercial shipping, strategic energy infrastructure and southern Red Sea access. Saudi Arabia also remains exposed to possible Iraq-origin drone activity. The overall threat should therefore be viewed as multi-directional rather than centred exclusively on Yemen. Riyadh retains considerable resilience through domestic infrastructure, alternative crude-routing arrangements and strong regional road connectivity, but maritime redundancy is becoming increasingly constrained.

AVIATION

Saudi airspace remains operational, but aviation exposure continues to require active management. The principal risk zones remain Yemen-linked activity in the south, Iraq-linked launch corridors in the north and east, Eastern Province infrastructure exposure and any renewed US-Iran military escalation. Missile or drone interception activity could quickly produce warning alerts, falling debris, temporary route restrictions, NOTAM changes, airline caution and fuel-planning adjustments. Regional military activity can also affect neighbouring FIRs and onward routing without closing Saudi airspace itself.

MARITIME

Saudi maritime exposure is now severe because both principal export directions are impaired simultaneously. Hormuz traffic has fallen towards commercial standstill, limiting confidence in Gulf-linked movements from Ras Tanura and Jubail. On the western side, Houthi pressure has sharply reduced Bab el-Mandeb traffic, with no Saudi oil shipments recorded through the chokepoint on Sunday. This significantly reduces the effectiveness of the Red Sea as a straightforward alternative to Hormuz. Saudi Arabia retains options through Yanbu, northbound Red Sea movements, Suez/SUMED arrangements and Mediterranean lifting, but these increase transit complexity, tanker requirements, scheduling pressure and cost.

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 available for authorised passenger and commercial traffic under prevailing controls.
- The primary supply-chain concern is maritime rather than domestic road movement. Simultaneous disruption in Hormuz and Bab el-Mandeb increases pressure on alternative tanker routing, Suez/SUMED capacity, inventories and air or road freight for time-sensitive goods.
- Cargo planners should maintain buffers for fuel pricing, insurance review, vessel delays, customs processing, driver availability and possible route changes. Critical industries should avoid just-in-time assumptions where inputs depend on maritime movements through either chokepoint.

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



United Arab Emirates

SECURITY SITUATION

The UAE has announced an indefinite trade embargo against Iran following claims two ballistic missiles were launched from Iranian territory towards the UAE. Iran have rejected the allegations and described the event as a false-flag activity.

The country faces a direct threat compared to recent weeks. Repeated attacks against ADNOC affiliated shipping were followed on 18 August 2026 by the launch of the two ballistic missiles. Further missile / drone incidents, maritime attacks and temporary security alerts remain active if US-Iran tensions remain unresolved.

AVIATION

UAE airspace remains operational but should continue to be treated as actively managed. Regional missile, drone, combat-aircraft and air-defence activity can affect flight planning even without a direct UAE aviation incident. GNSS interference, including spoofing and jamming, remains an additional operational concern. Airlines may face routing changes, departure-slot adjustments, neighbouring-FIR restrictions and fuel-planning requirements at short notice.

Passenger travel, executive movement and time-sensitive cargo can continue, but operators should verify current NOTAMs and airline status immediately before movement. Particular attention should remain on routes interacting with Bahrain, Kuwait, Oman, Saudi Arabia, Iraq, Iran and the wider northern Gulf.

MARITIME

Maritime exposure remains the UAE’s principal external vulnerability. Repeated attacks against ADNOC-operated vessels demonstrate that UAE-linked shipping is directly within the current threat environment. At the same time, near-zero weekend traffic through Hormuz indicates that the wider commercial shipping sector continues to avoid the Strait despite political and military claims concerning its control.

Jebel Ali and Khalifa Port remain operational, while Fujairah provides critical strategic redundancy outside the Strait. However, Gulf of Oman risks, insurance conditions, crew-security concerns and vessel availability can still affect Fujairah-linked trade.

MOVEMENT - SUPPLY CHAIN

- UAE land connectivity remains one of the country’s strongest resilience advantages.
- The Saudi border at Ghuwaifat/Al Batha and Oman crossings including Hatta/Al Wajajah and Khatmat Malaha remain important alternatives for passenger movement, road freight and contingency relocation.
- The principal supply-chain vulnerability remains external maritime and aviation connectivity rather than domestic road movement. Simultaneous pressure on Hormuz and Bab el-Mandeb can affect UAE cargo moving both east towards Asia and west towards Suez and Europe.
- Maintain buffers for vessel delays, insurance review, air-freight disruption and maritime rerouting. Keep Saudi and Oman road alternatives live for critical cargo and personnel where practical.

RISK RATINGS

Political	HIGH
Business	HIGH
Economic	MODERATE
Conflict	HIGH
Civil Unrest	LOW
Environmental	LOW
Crime	LOW
Legal	LOW

MITIGATIONS & RECOMENDATIONS

Immediate confrontation involving the disputed missile activity.



SECURITY SITUATION

Oman remains central to efforts to resolve the Hormuz crisis, but the operational environment has deteriorated despite continued diplomacy. Commercial traffic through the Strait has fallen towards a standstill, demonstrating that previous progress towards defining navigation routes has not produced commercially reliable passage. Musandam remains particularly exposed because of its proximity to the Strait and the shipping lanes at the centre of the US-Iran dispute. The Gulf of Oman should also continue to be treated as part of the active maritime-risk environment rather than a separate safe approach zone. Iran continues to connect broader US concessions with normalisation of shipping, while Washington maintains economic and maritime pressure. With negotiations stalled, Oman remains positioned between the two sides without a clear timetable for implementation.

AVIATION

Oman airspace remains important to regional aviation resilience, but routes around Musandam and the western Gulf of Oman remain exposed to wider military developments. Operators should continue monitoring NOTAMs, GNSS interference, military movements and routing links with UAE and Saudi airspace. Any renewed US-Iran strike cycle could rapidly alter the availability or desirability of northern Muscat FIR routing.

MARITIME

Hormuz remains Oman’s dominant strategic exposure. Weekend traffic falling to almost zero demonstrates that the core issue is no longer simply agreeing coordinates for a navigation route. The requirement is an arrangement that commercial operators, insurers, Iran, the US, Oman and regional states recognise as safe and predictable. Until that occurs, shipping teams should continue to assume elevated war-risk pricing, route checks, VHF monitoring, mine-risk awareness, vessel-interception risk and additional reporting requirements.

The Gulf of Oman remains equally important. Ships approaching or leaving Hormuz remain exposed before entering the narrow Strait itself. Musandam approaches and northern Omani waters should therefore remain active monitoring areas until commercial traffic returns at scale without repeated vessel attacks.

MOVEMENT - SUPPLY CHAIN

- Oman-UAE land crossings remain operational and should continue to serve as important resilience routes for passenger movement, freight and contingency access between Muscat, Sohar, Buraimi, Hatta and the wider UAE logistics network.
- The principal supply-chain vulnerability remains maritime. Hormuz-linked cargo, Gulf of Oman movements, tanker scheduling and marine insurance remain highly uncertain.
- Keep UAE land routes available for urgent movements and maintain additional inventory buffers for goods dependent on Gulf shipping. Sohar and Omani logistics facilities provide important resilience capacity, but their wider maritime connections remain exposed to the same conflict environment affecting Hormuz.

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 GCC's most sensitive operating environments because of the US Fifth Fleet presence, limited strategic depth and proximity to the unresolved US-Iran confrontation.

There has been no major new direct incident in the current reporting window, but the near-collapse of commercial Hormuz traffic demonstrates that the underlying dispute remains unresolved. Bahrain's strategic exposure is driven primarily by what happens next between Washington and Tehran rather than domestic instability.

Any renewed strike cycle could again place US-linked military facilities in Bahrain within Iran's threat calculus and rapidly trigger air-defence activity, warning sirens, public-safety measures and movement restrictions.

AVIATION

Bahrain aviation remains open but highly sensitive.

Regional missile, drone and air-defence activity can quickly affect Bahrain FIR, even when Bahrain is not the primary target. Previous incidents demonstrate how rapidly normal commercial operations can shift into a heightened public-safety posture.

Executive travel, staff rotations and time-sensitive cargo should therefore proceed only after checking current flight status, NOTAMs and applicable safety guidance.

MARITIME

Bahrain's maritime exposure remains linked to the wider Gulf rather than a specific port shutdown.

Near-zero Hormuz traffic indicates continuing vessel avoidance, insurer caution and uncertainty over safe passage. These conditions can delay Bahrain-linked cargo, raise war-risk costs and reduce carrier willingness even if Bahraini port operations remain unaffected.

A significant recovery in Hormuz commercial traffic would be one of the clearest positive indicators for Bahrain. Until then, port users should confirm vessel schedules, insurer approval, cargo timing and crew-security procedures before critical movements.

MOVEMENT - SUPPLY CHAIN

- The King Fahd Causeway remains Bahrain's most important physical resilience corridor.
- It should remain central to passenger movement, freight support, staff relocation, medical evacuation planning and contingency access to Saudi Arabia and the wider GCC road network.
- Routine movement continues, but staff-accountability procedures and relocation plans should remain current. During periods of heightened US-Iran military activity, avoid unnecessary movement near sensitive facilities and confirm transport availability before initiating emergency relocation.
- The Causeway remains particularly important if aviation or Gulf maritime operations deteriorate with limited warning.

RISK RATINGS

Political	HIGH
Business	HIGH
Economic	HIGH
Conflict	HIGH
Civil Unrest	LOW
Environmental	LOW
Crime	LOW
Legal	MODERATE

MITIGATIONS & RECOMENDATIONS

Bahrain remains exposed because of its strategic relationship with the US. Previous Iranian targeting and the presence of major US military facilities. No immediate kinetic escalation has been reported in the latest reporting period, but Bahrain would likely face an increased missile/drone threat.



SECURITY SITUATION

Qatar remains operationally stable, but the near-standstill in Hormuz materially increases its strategic exposure. Qatar's LNG export system depends heavily on reliable passage through the Strait. Only five commodity vessels were recorded through Hormuz on Saturday and none on Sunday, illustrating how far present conditions remain from normal commercial operation.

This does not mean Qatari LNG infrastructure itself is disrupted, but it increases tanker scheduling, insurance and market-confidence risk. Doha's mediation role remains potentially important, although current US-Iran diplomacy appears stalled and Iran has not committed to renewed negotiations.

The local security environment remains comparatively resilient, but Qatar's economic exposure to a prolonged Hormuz disruption is greater than that of most GCC states because of the importance of LNG exports.

AVIATION

Qatar airspace remains operational, but aviation continues to face indirect regional risk. Renewed US-Iran hostilities could generate missile, drone, interception and air-defence activity affecting neighbouring FIRs, with possible consequences for Qatar-linked routing, delays and fuel planning.

Passenger travel, executive movements and air cargo can continue while maintaining diversion plans and schedule flexibility. Monitor Bahrain, Kuwait, Iraq, Iran and northern Gulf airspace conditions closely. Air cargo may also become more important if maritime delays deepen, increasing potential demand and capacity pressure. Time-sensitive supply-chain planning should therefore consider both security-related routing changes and potential commercial capacity constraints.

MARITIME

Qatar's strategic maritime exposure has worsened because sustained LNG exports ultimately depend on Hormuz.

The near absence of weekend commodity traffic demonstrates that tanker confidence remains extremely weak. The issue is no longer simply political disagreement over management of the Strait; it is whether owners, crews and insurers consider passage commercially acceptable.

A renewed attack against another Gulf-linked tanker would further reduce confidence. Conversely, repeated LNG and crude tanker movements without incident would provide one of the strongest indicators that conditions are improving.

MOVEMENT - SUPPLY CHAIN

- The Abu Samra/Salwa crossing with Saudi Arabia remains Qatar's principal road-based resilience connection with the wider GCC.
- Domestic supply chains remain broadly functional, but prolonged Hormuz disruption increases exposure around LNG exports, port operations, maritime imports and air cargo.
- Maintain cargo-delay buffers, verify insurer and shipping conditions and keep Qatar-Saudi land-route options active for appropriate goods and personnel.
- Simultaneous disruption in Hormuz and Bab el-Mandeb also complicates wider Asia-Europe cargo routing. Businesses should review inventory levels, supplier lead times and air-freight alternatives where critical inputs depend on maritime transport.

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 its northern Gulf geography, critical power and water infrastructure, proximity to Iraq and previous Iran-related missile and drone activity.

There has been no major new direct strike in the current reporting window, but near-zero Hormuz traffic demonstrates that the underlying confrontation remains unresolved. Any renewed US-Iran military escalation could rapidly return Kuwait to a missile, drone and air-defence posture.

The recently disrupted ISIS-linked plot against a vital facility also remains relevant to security planning. Although the intervention demonstrates effective counterterrorism capability, it reinforces the need to protect critical infrastructure against both external and domestic threats.

Priority monitoring areas remain government and diplomatic sites, energy infrastructure, power and desalination facilities, ports, airports, military-linked installations, residential compounds and Kuwait-Iraq movement corridors.

AVIATION

Kuwait aviation remains highly sensitive because of proximity to Iraq, Iran and northern Gulf military activity.

Renewed missile or drone operations could quickly affect Kuwait FIR through air-defence activity, routing restrictions, temporary closure or falling debris. GNSS interference also remains relevant.

Passenger travel, executive movement and air cargo should proceed only after confirming current flight status, NOTAMs and applicable security guidance.

MARITIME

Kuwait’s maritime exposure remains high because northern Gulf access is ultimately dependent on the Strait of Hormuz.

Near-zero weekend transit volumes reinforce that safe commercial passage has not been restored. The principal Kuwait-linked threat is not necessarily port closure but vessel avoidance, tanker shortages, war-risk pricing, insurer restrictions and schedule delays.

Any further attack on Gulf-linked shipping would increase these pressures quickly. Conversely, sustained vessel traffic through Hormuz without attack would materially improve the outlook.

MOVEMENT - SUPPLY CHAIN

- Kuwait-Saudi crossings, including Nuwaisib and Salmi, remain the preferred overland resilience routes for passenger traffic, freight, urgent logistics and southbound contingency movement.
- The Iraq border should remain operationally sensitive. Do not route staff or time-sensitive cargo through Iraq without current security review and appropriate movement authority.
- The combination of maritime uncertainty, infrastructure exposure and the recently disrupted terrorism plot supports maintaining three-day resilience planning for water, power, fuel, communications and essential supplies.
- Critical facilities should continue reviewing access control, contractor procedures, emergency power and staff-accountability arrangements.

RISK RATINGS

Political	HIGH
Business	HIGH
Economic	HIGH
Conflict	SEVERE
Civil Unrest	LOW
Environmental	HIGH
Crime	LOW
Legal	LOW

MITIGATIONS & RECOMENDATIONS

Kuwait currently face a lower immediate kinetic threat than UAE or Saudi Arabia, but it’s proximity to Iran and the US military presence leave them exposed to attacks by both IRGC and Iraq militias.



Escalation Triggers

RED

ACT NOW

- Another ADNOC-operated or other GCC-linked tanker is struck, disabled or suffers casualties in Hormuz.
- A Houthi attack strikes or sinks another Saudi-linked tanker or commercial vessel in Bab el-Mandeb.
- US maritime enforcement and Iranian forces enter a direct major exchange around Hormuz or the Gulf of Oman.
- Renewed US strikes on Iran trigger missile or drone retaliation against GCC territory.

AMBER

WATCH

- Hormuz traffic remains below ten commodity vessels per day without a political breakthrough.
- Additional GCC-linked ships avoid Hormuz, turn back or switch off AIS because of security concerns.
- Yemen missile, drone or ground activity continues around Marib, Mocha or southern front lines.
- Bahrain or Kuwait reactivates public-safety or air-defence alerts without a confirmed strike.

GREEN

IMPROVING

- ADNOC and other GCC-linked tankers transit without further attacks.
- Iran and the US agree an implementable mechanism for commercial passage.
- Houthi threats against Saudi-linked maritime traffic decline.

Additional watch items

- Daily Hormuz vessel counts and direction of travel.
- Further attacks involving ADNOC-operated vessels.
- Iranian requirements for vessels using Hormuz.
- US naval blockade and enforcement activity.
- Any renewed US-Iran negotiating channel.
- War-risk insurer response to the latest tanker incidents.
- Fujairah and Gulf of Oman vessel activity.
- Qatar LNG tanker movements and waiting patterns.
- Houthi enforcement of the Saudi maritime blockade.
- Saudi crude movements through Bab el-Mandeb.
- Yanbu and Suez/SUMED export patterns.
- Saudi Red Sea tanker AIS behaviour.
- Further attacks against Saudi energy infrastructure.
- Iraq-linked launch activity towards Saudi Arabia or Kuwait.
- Bahrain Fifth Fleet posture and public-safety alerts.
- Kuwait power, water and critical-infrastructure security.
- GCC aviation NOTAMs and GNSS-interference reporting.

Positive confirmation signals

- Hormuz records sustained growth in commercial traffic.
- No further attacks occur against ADNOC or other GCC-linked vessels.
- Repeated tankers transit Hormuz without attack, interception or forced diversion.
- Marine insurers restore wider cover without significant additional restrictions.
- Saudi oil movements resume through Bab el-Mandeb.
- No further Houthi attacks occur against Saudi shipping or energy facilities.
- Suez/SUMED and Saudi alternative export routes operate without major congestion.
- Iran and the US resume substantive negotiations.
- No further Iraq-linked drone attacks reach GCC territory.
- Bahrain and Kuwait record no new interception or siren activity.
- GCC airspace remains open without major new restrictions.
- GCC land borders continue functioning under standard controls.

Look Ahead

Tehran is likely to escalate the specificity of its warnings to Gulf governments, extending beyond general deterrence rhetoric to explicit references to airspace access, basing arrangements, intelligence-sharing, refuelling support, and maritime cooperation. GCC states are likely to quietly reinforce air and missile defence readiness, harden critical infrastructure, and deepen military consultation among themselves and with Washington while deliberately limiting public disclosure to avoid appearing to align against Iran.

Kpler shipping data shows Hormuz crossings falling to six on Tuesday, down from nine on Monday and well below the ten-day rolling average of eleven a meaningful dip in traffic volume rather than statistical noise. Brent crude was trading at \$91.28/barrel and WTI at \$85.31, prices that reflect the market's ongoing risk premium without signalling panic-level disruption. The practical effect is that Iran achieves much of the strategic leverage of a closure suppressed volumes, sustained price premium.

- Iranian statements naming specific GCC states by name, rather than addressing collectively
- Evidence linking GCC territory or airspace to US strike operations
- Additional trade embargoes, port restrictions, or airspace closures
- Shifts in aerial-refuelling patterns and regional force-protection posture
- Iranian boarding, inspection, detention, or tariff enforcement actions in the Strait of Hormuz
- Further declines in independently tracked commercial transit volumes
- Emergency GCC meetings or coordinated defence announcements
- Intensified mediation activity involving Oman, Qatar, or Iraq
- A shift from rhetorical warnings to published Iranian rules of engagement

Next 72–96 hours: Watch Hormuz traffic first. The strongest immediate indicator will be whether commercial vessels begin transiting again after the near-zero weekend or whether the standstill persists. Additional attacks against ADNOC-operated or other GCC-linked vessels would reinforce the deterioration and could push more carriers and insurers towards avoidance. Watch Bab el-Mandeb simultaneously. The key Saudi indicator is whether crude exports resume through the southern Red Sea or continue shifting towards northbound alternatives and Suez/SUMED.

Next 7–14 days: The central question is whether near-zero Hormuz traffic becomes the new operating baseline. If commercial passage remains negligible despite the Strait being physically open, Gulf supply chains will increasingly adapt around a prolonged disruption rather than wait for rapid normalisation. That would increase tanker demand, insurance costs, inventory requirements and reliance on alternative ports and overland routes. Saudi Arabia faces the same question in Bab el-Mandeb. Continued Houthi restrictions would reduce the value of the Red Sea as an alternative export corridor and increase dependence on Suez/SUMED-linked movements and more complex routing. Qatar requires particular attention because sustained LNG exports depend heavily on Hormuz. A prolonged collapse in tanker transit confidence would increasingly affect scheduling and market expectations even without direct damage to Qatari facilities.

Next month: The most likely scenario is prolonged active containment with simultaneous impairment of Hormuz and Bab el-Mandeb. Hormuz is unlikely to normalise until commercial operators see sustained safe passage backed by an enforceable political mechanism. The current near-zero traffic level demonstrates that military declarations alone are insufficient. Saudi Arabia will remain the GCC state facing the most complex maritime challenge because the Kingdom is exposed simultaneously through Hormuz, Bab el-Mandeb, Houthi attacks and potential Iraq-linked activity. The UAE will remain operationally resilient but increasingly exposed through the nationality and ownership of its commercial fleet. Qatar remains highly dependent on LNG transit confidence. Oman will remain strategically central because any workable Hormuz solution requires its involvement. Bahrain and Kuwait remain the clearest indicators of whether maritime confrontation is again spilling over into direct attacks against GCC territory.

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 — **SEVERE**

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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