

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

24 August 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

No state crossed a kinetic threshold in the past 74 hours, but the window's substantive development is diplomatic rather than kinetic: a US threat against a Gulf mediator state is a meaningful departure from this conflict's established pattern and should be the lead item for risk professionals monitoring US-GCC relations, ahead of the Saudi-Houthi trajectory as the second-priority watch item.

Key developments:

Oman: direct US presidential threat, followed by rapid diplomatic containment. Reporting on 21 August confirmed President Trump's renewed threat to bomb Oman over its role brokering Iran-Hormuz negotiations, prompting an emergency Rubio–Al Rahbi meeting in Washington on 20 August. Iran-Oman talks on a jointly managed Strait transit arrangement remain close but unfinalized. This is the standout item of the window — the first instance this cycle of a US threat directed at a Gulf state itself rather than at Iran and merits close tracking given Oman's role as the sole active US-Iran channel.

Saudi Arabia: Houthi-government escalation continued through 20 August, with Yemeni government forces reporting 81 attacks on Houthi positions in a 24-hour period and Houthis claiming strikes on Najran airport and an Aramco facility. No confirmed cross-border strike on Saudi soil landed inside the strict 74hr window, but the trajectory (near-weekly Najran/Jazan strikes since early August) makes this the highest-probability near-term escalation vector in the GCC.

Kuwait and Bahrain reinforced allied security architecture within the window — Kuwait's Joint Military Committee meeting with the Pentagon (22 August) and Bahrain's Joint Security Working Group with the UK (reported 22 August, held 20 August) both signalling sustained rather than reduced allied engagement.

UAE and Qatar recorded no new incident inside the window. UAE's most recent missile alert (18 August) and cyber-targeting escalation (mid-August) both sit just outside the 73-hour cutoff but remain the most recent live threat data for that state. Qatar remains the quietest GCC state this cycle, with no incident since 12 July.

Strait of Hormuz throughput data (15–20 August, most recent available) continues to show severe suppression — 38 commodity-vessel transits, -92% below pre-war levels with no update inside the window itself.

- Yemeni government forces report 81 Houthi operations in a 24-hour period. *[Single-source attribution — Yemeni government (Saudi-backed) forces; independent verification pending.]*
- IRGC spokesman Brig. Gen. Hossein Mohebbi (Aug 20) stated Saudi Arabia "will certainly be unable to contain Yemen and Ansarullah or remain safe from their attacks," and that "the more Saudi Arabia attacks, the more it gets hit in return."
- Houthi military spokesman Yahya Saree (Aug 20) claimed two drone strikes on Najran, southern Saudi Arabia.

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

PLANNING ASSUMPTION

Plan for active containment with near-standstill Hormuz traffic, sustained Red Sea disruption and no immediate diplomatic breakthrough. Movement remains possible across most of the GCC, but posture should stay elevated until Hormuz traffic recovers materially, attacks against GCC-linked vessels stop, Bab el-Mandeb becomes usable for Saudi exports, Iran and the US establish an implementable maritime arrangement, Iraq prevents further cross-border attacks and Bahrain/Kuwait experience a sustained period without renewed missile or drone activity.

[Assessed — moderate confidence]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain				► WATCH	US-linked posture and unresolved US-Iran confrontation keep Bahrain severe despite no major new direct incident.
Kuwait				► WATCH	Northern Gulf exposure, infrastructure vulnerability and Iraq-linked threats continue to keep Kuwait severe.
Qatar				► WATCH	Near-standstill Hormuz traffic materially increases Qatar’s LNG and tanker-access exposure.
UAE / Dubai				► WATCH	Repeated attacks against ADNOC-operated tankers increase direct UAE-linked maritime exposure. Recent strikes on 18 August 2026.
Saudi Arabia				▲ WORSENING	Hormuz disruption and Houthi pressure on Bab el-Mandeb increasingly constrain both Saudi maritime outlets.
Oman				► WATCH	Musandam and Gulf of Oman exposure remain high as Hormuz traffic falls towards commercial standstill.

RISK SCALE LOW MODERATE HIGH SEVERE CRITICAL



Saudi Arabia

SECURITY SITUATION

Cross-border strikes into Saudi Arabia appear to be continuing, but reporting remains fragmentary and largely single-sourced; confidence in specific incident details should be treated as provisional pending further corroboration.

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. Houthi operational tempo remains elevated across western Yemen and the southern Saudi border region, consistent with a sustained rather than episodic campaign. Mocha is the best evidenced flashpoint, with multiple corroborating indicators pointing to it as the primary locus of pressure.

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 Ghuwair/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 & RECOMMENDATIONS

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.



United Arab Emirates

SECURITY SITUATION

Having suspended all trade and financial ties with Iran (19 Aug) following the 18 August missile incident, UAE is the GCC state most exposed to Iranian retaliatory messaging in this window. Watch for: further missile/drone activity toward UAE territorial waters or airspace; renewed Iranian "false flag" denial rhetoric; possible grey-zone cyber or maritime harassment targeting ADNOC-linked shipping.

The repeated targeting demonstrates that UAE-linked commercial assets remain directly exposed even where domestic ports and infrastructure continue to operate normally. Hormuz traffic has meanwhile fallen towards commercial standstill. Only five commodity vessels were recorded transiting on Saturday and none on Sunday, a dramatic reduction from pre-war conditions.

This creates a significant distinction between domestic operational stability and external connectivity. The UAE's main concern is therefore not immediate domestic disruption but the security and commercial viability of maritime access to Gulf terminals. Fujairah remains strategically important because it lies outside Hormuz, but the Gulf of Oman itself remains part of the wider military-risk environment.

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. 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

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 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. With traffic still falling 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.

Iran and Oman have reportedly agreed on a shipping route through the Strait and are finalising arrangements for jointly managing the waterway, with ships entering through Iranian waters and exiting through Omani waters described by Tehran as a "new security model" rather than a full reopening. As of the most recent Rubio comments, progress has been made but "not finality yet." This places Oman in the highest-exposure diplomatic position in the GCC: any deal (or its collapse) will be attributed in large part to Muscat's mediation, and Trump's bombing threat is explicitly tied to Oman's role in shaping that outcome — i.e., the threat and the negotiation are the same story.

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.



SECURITY SITUATION

Allied travel-risk assessments remain static and elevated. Australia's Smartraveller advisory (updated 12 Aug, still current 22 Aug) continues to advise against all travel to Bahrain, citing continued risk of military strikes, reprisal attacks, and attacks on critical/civilian infrastructure, including hazards from falling debris from intercepted drones and missiles. Canada's advisory (updated 21 Aug) likewise continues to advise against non-essential travel, noting that missile and drone attacks have resumed and struck targets in Bahrain including civilian infrastructure.

No new kinetic incident reported in Bahrain in the past 24 hours. Current open-source reporting does not show a new strike, drone/missile activity, or attack on Bahraini or allied (US 5th Fleet/Naval Support Activity Bahrain) infrastructure in this window. This is notable given Bahrain's history as a recurring target (Iranian strikes on Manama/Juffair earlier in the 2026 conflict)

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.

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

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

Aug 21: Foreign ministers of Qatar and seven Arab and Islamic states issued a joint statement condemning Israel's settlement policies in occupied Palestinian territory and rejecting the "E1" settlement plan

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

No security-driven disruptions were identified in the 72-hour window. One isolated delay (a JetBlue departure from Hamad International) was flagged in monitoring feeds but assessed as consistent with the wider pattern of aviation congestion rather than security-related causes.

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

UK FCDO downgraded its Kuwait travel advisory (21 Aug). The UK Foreign Office removed its prior elevated-risk guidance, citing a "regional security reassessment"

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

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 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.

Airspace across all six GCC states (Saudi Arabia, UAE, Qatar, Kuwait, Bahrain, Oman) remained open as of the most recent status check (24 Aug). No new closures reported. Threat picture remains driven by three concurrent tracks: (1) the broader US-Iran war and Strait of Hormuz contest, (2) the Houthi-Saudi escalation with Red Sea/Gulf of Aden maritime blockade, and (3) sporadic direct Iranian action against UAE/Gulf shipping and territory.

No single GCC state saw a discrete new attack confirmed strictly within the last 24 hours; the active threat picture is best understood as a continuation of three running campaigns (Houthi-Saudi, Iran-UAE, Iran-Hormuz shipping) rather than a new spike. UAE and Saudi Arabia carry the highest current exposure. Qatar, Kuwait, and Bahrain sit in a lower-tempo but not risk-free posture, with Kuwait's overflight status the one item requiring same-day NOTAM verification before publication. The 24 Aug sanctions announcement by US Treasury Secretary Bessent is the most likely near-term inflection point to watch. Bahrain sit in a lower-tempo but not risk-free posture, with Kuwait's overflight status the one item requiring same-day NOTAM verification before publication.

Next 72–96 hours: This is the single highest-confidence scheduled event in the forecast window and the primary variable shaping the next 72–96 hours. US Treasury Secretary Scott Bessent will detail what he has billed as the "toughest sanctions in history" against Iran, explicitly framed as pursuing regime economic collapse rather than a negotiated settlement. Expected scope: secondary sanctions targeting any state or entity transacting with Iran (oil purchases, ship-to-ship transfers, financial transfers), continued naval blockade enforcement, and direct pressure on China (which takes 80% of Iran's oil exports). Oil market volatility: Brent has already risen above \$92–95/bbl on the announcement; expect continued price sensitivity around the Monday press conference regardless of actual content.

UAE: HIGHEST WATCH ITEM Having suspended all trade and financial ties with Iran (19 Aug) following the 18 Aug missile incident, UAE is the GCC state most exposed to Iranian retaliatory messaging in this window. Watch for: further missile/drone activity toward UAE territorial waters or airspace; renewed Iranian "false flag" denial rhetoric; possible grey-zone cyber or maritime harassment targeting ADNOC-linked shipping.

SAUDI ARABIA: SUSTAINED HIGH TEMPO, YEMEN FRONT

Houthi operational tempo (81 ops/24hr per Yemeni government reporting) is unlikely to de-escalate in this window; expect continued claimed strikes on Najran/Jazan energy infrastructure and airports. The more significant risk driver: Yemeni government forces have warned the Houthis are preparing a ground offensive to seize coastal territory near Bab al-Mandeb. If this offensive launches in the forecast window or if Saudi-backed forces move pre-emptively expect a substantial jump in cross-border missile/drone activity against southern Saudi Arabia within 24–48 hours of any ground movement. This is the most consequential potential trigger event in the entire forecast.

STRAIT OF HORMUZ / MARITIME: ELEVATED, TRANSIT-DEPENDENT

Iran's post-ceasefire-expiry enforcement posture (fatal attack on *Minoan Dignity*, seizure of tanker *Amara*, continued detention of a Liberia-flagged tanker near Qeshm) signals Tehran is actively re-asserting operational control rather than de-escalating ahead of the sanction's announcement.

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.

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.

Planning baseline: Treat the GCC as open but unstable, with maritime risk worsening across both Hormuz and Bab el-Mandeb and no immediate diplomatic resolution. Operational movement can continue, but posture should remain elevated until Hormuz traffic recovers materially, attacks against GCC-linked shipping stop, Saudi oil shipments resume safely through Bab el-Mandeb, insurers restore confidence, Iran and the US agree an implementable maritime mechanism, Iraq prevents cross-border attacks and Bahrain/Kuwait remain free from renewed missile or drone incidents.

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**

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 CRITICAL) 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.

Level	Definition	Typical Indicators	Recommend Response
Low	Stable environment with minimal threat of disruption. Normal political, security, and economic conditions prevail.	No active conflict: stable diplomatic relations: functioning institutions: open trade/travel routes:	Routine monitoring only, Business/travel proceeds normally.
Moderate	Underlying tensions or risk factors exist but are being actively managed. Isolated incidents possible but not systemic.	Diplomatic friction: sanctions rhetoric: occasional posturing: consented but unresolved disputes:	Increased situational awareness. Contingency planning advisable but no operational changes needed.
High	Active tensions or recent hostile activity with a real possibility of escalation. Disruption to trade, travel, or infrastructure is plausible.	Recent attacks or military posturing: breakdown of talks: troop/asset build-up: targeted sanctions: localized unrest.	Active monitoring, scenario planning, risk mitigation measure (insurance, alternative routes, security protocols).
Severe	Significant, ongoing disruption or hostilities affecting a state directly. Escalation is likely without intervention.	Direct attacks on infrastructure or territory: closure/restriction of key routes (e.g., Hormuz): casualties reported: emergency diplomatic sessions.	Reduce exposure where possible: activate contingency/evacuation plans: heightened security posture: close coordination with authorities.
Critical	Active conflict, existential threat, or conditions where major regional or systemic disruption is imminent or underway.	Ongoing warfare: regime instability or collapse: major infrastructure destroyed: blockade or strategic chokepoints: large-scale casualties.	Avoid all non-essential presence /exposure: full contingency activation: treat as an acute crisis requiring real-time reassessment.

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