

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

31 August 2026

Actionable Intelligence – Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

US forces struck two Iranian missile launchers on Larak Island (30 August), a senior US official told media outlets as Iranian media reported unconfirmed casualties from the attack near the Strait of Hormuz. A senior US official told Axios: "Earlier today, US forces struck two Iranian launchers on Larak Island. Islamic Revolutionary Guard Corps forces were observed preparing to launch rockets with sea mines into the Strait of Hormuz

Supreme Leader Ayatollah Mojtaba Khamenei has issued a direct public appeal to Gulf rulers to "identify their real enemy" and align against it, published Sunday via Telegram to mark Islamic Unity Week. Tehran has paired this messaging with continued restriction on the Strait of Hormuz, stating it will not normalize maritime access until U.S. commitments are met.

Iran continues to assert conditional closure and passage-control threats without moving to full-scale implementation. Oman, Qatar, Pakistan, and Iraq maintain parallel mediation tracks, but none produces a binding or enforceable agreement. Washington sustains its blockade posture alongside continued economic pressure on Tehran. GCC states remain divided in their individual responses, reflecting differing risk tolerances and bilateral relationships with Iran and the U.S. Absent from this trajectory are two key escalation triggers: systemic action against Chinese banks and a renewed large-scale U.S.-Iran military exchange. Israeli multi-front operations continue at current tempo.

Oman: United Kingdom Maritime Trade Operations (UKMTO) officials announced that an oil tanker was struck by an unknown projectile while transiting through the Strait of Hormuz approximately 12 nautical miles (22.2km) north of Khasab, Musandam governorate in Oman, overnight on 29-30 August. There were no immediate reports of casualties.

Sanctions & Financial Pressure: No new U.S. Treasury sanctions package was identified during the 00:00–08:00 UTC reporting window. The measures targeting Banque Misr (UAE) and Bank Melli–linked entities, issued 28 August, remain the most recent significant enforcement action. This step reinforces Washington's continued willingness to extend financial pressure into third-country banking infrastructure connected to sanctioned networks, while notably stopping short of designating systemically important Chinese financial institutions, a threshold the U.S. has so far avoided crossing.

Interdiction activity: CENTCOM reports that since the blockade resumed, US naval forces (20+ warships, hundreds of aircraft) have turned around 75 vessels attempting to run the blockade and disabled three vessels that did not comply when directed. Separate reporting indicates 2 vessel boardings during the same period.

Mine threat status: Adm. Brad Cooper (CENTCOM Commander) announced that internationally recognized transit routes at the Strait's Traffic Separation Scheme (TSS) have been cleared of Iranian-laid sea mines, following a multi-month clearance operation using Navy divers, Navy SEALs, and air assets from the Army, Navy, Air Force, and Marine Corps. Cooper characterized the operation as low-profile, stating forces "meticulously and quietly cleared them of sea mine threats." *Arab News* + 2

Operational context: Mine-laying by Iran began in early April along major commercial routes; the US began mine-clearance operations in mid-April using destroyers USS Michael Murphy and USS Frank E. Petersen, later expanding to underwater drones. UKMTO's most recent recorded incident was on August 26 — an "unknown projectile" strike on an oil tanker, no injuries reported. Task & Purpose Task & Purpose

Residual risk: Despite mine clearance, the blockade remains active and the IRGC has stated the Strait, including waters off Oman, will remain under Iranian military control until US demands are met. Assess continued risk from asymmetric threats (fast boats, drones, sporadic projectile incidents) even with lanes now clear of mines.

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.

Maritime security in the Red Sea continues to face active Houthi attack claims, with two confirmed vessel incidents in the past 48 hours resulting in fires but no crew casualties or environmental damage.

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

Red Sea / Gulf of Aden: Forces aligned with Yemen's National Resistance intercepted a vessel reportedly carrying drone components destined for Houthi forces; no further details on the ship, cargo specifics, or crew have been disclosed.

Red Sea maritime incidents are expected to continue at current operational tempo, with Houthis sustaining 2–4 claimed attacks per week. No escalation to territorial or civilian infrastructure in major population centres is indicated.

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 & 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.



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

A 31.3% year-on-year decline in first-half passenger traffic through Dubai International Airport (DXB), constitute tangible evidence that the conflict is imposing substantial economic costs beyond its immediate operational theatre.

Finnish carrier Finnair has cancelled all scheduled flights between Helsinki and Dubai for the upcoming IATA winter season, running from 25 October 2026 to 27 March 2027. The airline attributed the decision to the unstable security situation in the Middle East, noting no clear signs of improvement.

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 at moderate global risk but faces an acute and escalating maritime security threat in the Strait of Hormuz and adjacent territorial waters. Since mid-August, at least five commercial vessels have sustained projectile or unmanned aerial vehicle (UAV) strikes in Omani waters and the immediate maritime zone, with the most recent incident on 24–25 August resulting in engine-room damage and vessel immobilization. No credible claim of responsibility has been publicly attributed.

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

United Kingdom Maritime Trade Operations (UKMTO) officials announced that an oil tanker was struck by an unknown projectile while transiting through the Strait of Hormuz approximately 12 nautical miles (22.2km) north of Khasab, Musandam governorate in Oman, overnight on 29-30 August. There were no immediate reports of casualties.

Oman occupies a uniquely dual position in this landscape, functioning as the central mediator and primary negotiator for corridor-related diplomacy while remaining physically exposed to any incident in the Strait of Hormuz.

Strait of Hormuz / Omani territorial waters (25 Aug 2026): Same incident characterized as immobilizing strike; environmental impact assessment ongoing. No broader maritime traffic shutdown reported, but transit-risk advisories elevated across the region.

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.

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

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.

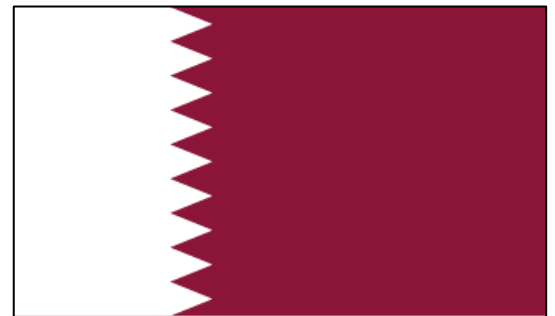
Regional maritime incident (28 August 2026, Hormuz region). At least one commercial tanker sustained a hit from an unidentified projectile in the broader Hormuz area. This incident is geographically external to Qatar but affects shipping lanes critical to Qatar's LNG and hydrocarbon exports.

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.



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.

SECURITY SITUATION

OSAC advisory renewal and Mina Al Ahmadi closure notice (28–29 August). US State Department maintained Level 3 "Reconsider Travel" advisory for Kuwait, citing unexploded ordnance at Mina Al Ahmadi, risk of sudden airspace closures, and potential targeting of military, government, and energy infrastructure. Port remains closed to international traffic.

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.

Kuwaiti-flagged tanker damaged in Strait of Hormuz (28–29 August). The AL SALAM II, transiting international waters, sustained projectile damage above the waterline; crew safe, fire controlled, no environmental release reported. Incident underscores maritime security exposure for Kuwaiti shipping.

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.

Look Ahead

The 31 August window is not a shift into a new kinetic phase. It is a shift in the political geometry of an existing coercive contest. The underlying dynamics (sanctions, Hormuz leverage, mediation) are unchanged; what has moved is who Tehran is talking to and how directly.

Rhetorical escalation, not military escalation: Reuters reports that Khamenei has pivoted from domestic-cohesion messaging to a direct appeal to Gulf and Muslim rulers, urging them to identify and confront what he characterizes as their "real enemy." This shift matters because the target audience, Gulf states simultaneously hosts U.S. forces, provides logistics support, and sits inside the sanctions and maritime-security architecture ringing Iran. Tehran is not just messaging its own public; it is attempting to pressure-test Gulf alignment with Washington.

Hormuz remains the pressure point: Iranian Deputy Foreign Minister Gharibabadi has stated that the Oman understanding is not self-executing, and that Tehran is in no hurry to reopen full passage before U.S. commitments are met. This creates a time asymmetry: Washington needs visible results from economic coercion on a political clock.

Mediation is widening, not converging: Iraq has offered to act as an additional bridge alongside Oman, Qatar, and Pakistan. But no single channel — nor all four combined — can independently reconcile the sanctions regime, military passage rights, insurance liability, Iranian enforcement claims, and U.S. blockade rules into one executable framework.

Next 72-96hrs: Iran is not rushing to reopen Hormuz. It is using maritime leverage, strategic patience, and a region-led security narrative to raise the political cost of GCC alignment with U.S. pressure. This is a political escalation, not yet a kinetic one. The crisis remains coercive and non-normalised. The next test is whether Gulf states adjust military, sanctions, or maritime cooperation, or treat Tehran's messaging as rhetoric while the existing security architecture holds.

Tehran is calibrating pressure below the threshold of direct confrontation, betting that ambiguity and drawn-out signalling will do more to fracture U.S.-GCC alignment than an actual disruption to shipping. The approach favours narrative control framing Gulf security as a regional, not U.S.-brokered, matter over overt military action.

Indicators to watch – Next 72-96hrs:

- Any shift in IRGC naval posture or exercises near the Strait
- Gulf state statements on sanctions enforcement or U.S. security cooperation
- Insurance and shipping cost movements as a proxy for market-perceived risk
- Bilateral Iranian outreach to individual GCC states (especially Oman, Qatar) versus collective GCC messaging
- Any deviation from normal commercial transit patterns through the Strait

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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