Global Situational Awareness

THE MENA WEEKLY

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Key Takeaways

- Iraq — Militia disarmament moves risk preserving Iranian-backed influence — HIGH
- Yemen - Houthi attacks on Saudi energy infrastructure widen escalation risk – HIGH
- Iran/Oman - Iran-Oman arrangement raises freedom-of-navigation questions — HIGH
- Libya — LNA intelligence chief killed as Zawiya refinery comes under drone attack — HIGH
- Gaza / Israel — Netanyahu rejects Trump-backed Gaza plan — SEVERE
- Morocco / Spain — Ceuta migration crisis enters social-media enforcement phase — HIGH

Iraq — Militia disarmament moves risk preserving Iranian-backed influence — HIGH

Situation Update

On 8–10 August 2026, Iraq appeared to take limited steps to prevent further Iranian-backed militia attacks against Saudi Arabia and other regional states, but the structure of those steps raises concern that militia power may be preserved rather than dismantled. Iraqi officials who met a Saudi intelligence delegation on 8 August reportedly pledged to prevent the use of Iraqi territory for attacks against Saudi Arabia and asked for information that could help stop future strikes. The engagement suggests Baghdad is trying to avoid further retaliation against Iraq while signalling to Riyadh that it can restrain armed groups operating from Iraqi territory.

On 9 August 2026, an Iraqi political source said militias would hand over their weapons to the Popular Mobilisation Forces before the federal government's 30 September 2026 disarmament deadline. That deadline coincides with the planned withdrawal of US-led coalition forces from Iraq. However, the PMF itself contains many Iran-aligned militias and is led by actors with close ties to Tehran. Transferring weapons into the PMF would therefore risk moving militia capability into a state-recognised structure that Iran has heavily infiltrated rather than placing it under genuinely independent federal control.

The issue is further complicated by reported attacks and covert command structures. Security and intelligence sources speaking to Saudi media said Iranian-backed militias may have carried out a drone strike on 2 August that destroyed shells for US-provided Iraqi tanks and armoured vehicles at Camp Taji. Separately, US-funded Arabic-language media reported additional details of IRGC-linked cells operating through small groups of Iraqi fighters who maintain a low profile and bypass formal militia leadership.

Assessment/Impact/Business Implications

For businesses, the immediate risk is that Iraq's disarmament process becomes cosmetic rather than substantive. If weapons move from militias into the PMF without meaningful command reform, Iraq may appear to be complying with state-control demands while preserving armed networks capable of threatening Saudi Arabia, Iraqi Kurdistan, US-linked facilities and domestic opponents. This would keep security risk elevated for energy firms, logistics operators, contractors and foreign investors.

The Camp Taji incident is especially concerning because it suggests some militias may be attempting to weaken the Iraqi military's ability to act against them. If true, this points to a direct contest over state coercive power. It also raises the risk that military facilities, US-supplied equipment and coalition-linked infrastructure could remain targets during the disarmament period.

The overall risk remains high because Baghdad is trying to balance Saudi pressure, Iranian influence, militia resistance and the coalition withdrawal timeline. Companies should monitor whether the 30 September deadline produces real disarmament, PMF consolidation, or renewed attacks designed to pressure the Iraqi state before US-led forces leave.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	LOW	Environment	HIGH
Crime	MODERATE	Legal	MODERATE

Yemen - Houthi attacks on Saudi energy infrastructure widen escalation risk – HIGH

Situation Update

On 9–11 August 2026, Houthi attacks on Yemen's government-held port city of Mokha and Saudi-linked energy infrastructure widened concern that the Red Sea conflict is again moving beyond maritime harassment into a broader regional escalation cycle. Yemen's military said the Houthis had resumed attacks on Mokha, a strategic Red Sea port city held by forces opposed to the group. The renewed strikes are significant because Mokha sits close to Bab Al Mandeb, where attacks can affect both Yemen's internal conflict and wider commercial shipping confidence.

At the same time, Houthi attacks have increasingly targeted Saudi energy assets and Red Sea-linked infrastructure. The group's strikes are part of a broader escalation against the Yemeni government, Saudi Arabia and shipping routes connected to the Red Sea. Recent coverage of the Mokha attacks and wider reporting on Houthi action against vessels, government-held areas and Saudi-linked targets show that the threat environment remains multi-layered.

The strategic risk is that the Houthis are using simultaneous pressure on ports, vessels and Saudi energy infrastructure to demonstrate reach and complicate alternative export routes. This matters because Saudi Arabia has relied on Red Sea routes as a partial hedge against Hormuz disruption. If both Hormuz and the Red Sea become unstable at the same time, regional energy resilience weakens significantly.

Assessment/Impact/Business Implications

For businesses, the immediate risk is renewed pressure on Red Sea shipping, Bab Al Mandeb transit, Saudi energy infrastructure and Yemen-linked port operations. Shipowners, charterers, insurers and energy companies may face higher war-risk costs, tighter routing controls, crew concerns and more restrictive vessel-acceptance criteria. Even where attacks do not close routes, they can slow decision-making, delay cargoes and raise the cost of operating near Yemen.

The Saudi dimension is particularly important. If Houthi strikes against energy facilities become more frequent, Saudi exports and refinery operations may face greater security costs and contingency-planning requirements. The attacks also undermine confidence in Red Sea alternatives at the same time as Hormuz remains politically contested. That creates a connected chokepoint risk across two major maritime theatres.

The overall risk remains high because Houthi activity is not confined to one target set. Attacks on Mokha, vessels and Saudi-linked infrastructure create a broader escalation environment in which commercial operators cannot separate Yemen's civil war from regional energy security. Businesses with exposure to Red Sea shipping, Saudi western infrastructure or Yemen-adjacent logistics should maintain elevated monitoring and flexible routing options.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	LOW	Environment	HIGH
Crime	MODERATE	Legal	MODERATE

Iran/Oman - Iran-Oman arrangement raises freedom-of-navigation questions — HIGH

Situation Update

On 9–11 August 2026, emerging details of a possible Iran-Oman arrangement over the Strait of Hormuz raised new questions over Gulf access, freedom of navigation and the commercial rules governing passage through one of the world's most important energy chokepoints. The proposed arrangement appears to focus on a temporary mechanism for managing shipping through Hormuz, with Iran and Oman discussing safe passage while the United States and regional governments assess whether the plan could restore confidence in Gulf access. By 11 August 2026, oil markets were already reacting to signs of movement in the talks, even as disruption to Middle East energy flows continued to affect prices and shipping sentiment.

The key issue is whether the arrangement would support normal navigation or create a new political framework for controlling access. Market attention has focused on Oman-Iran discussions because crude oil and refined product exports through Hormuz remain below normal levels, while earlier reporting has highlighted the wider regional stakes around the strait, including energy flows, Red Sea alternatives and US-Iran tensions.

Uncertainty remains over whether any arrangement would exclude hostile-state vessels, preserve toll-free commercial transit or establish route controls that could later become politically entrenched. Oman has traditionally sought to preserve its role as a mediator and maritime stakeholder, while Iran continues to view Hormuz as a core source of strategic leverage. This makes the legal design of any temporary framework as important as the immediate security effect.

Assessment/Impact/Business Implications

For businesses, the arrangement could reduce some short-term uncertainty if it produces a clear and credible safe-passage mechanism. However, it could also introduce new complexity if vessels, insurers and charterers are forced to interpret temporary controls, service charges, escort arrangements or politically defined access conditions. Shipping companies will need clarity on whether passage remains open to all lawful commercial vessels or becomes subject to political screening.

The risk is especially relevant for tankers, LNG carriers, container services, Gulf ports, refiners, traders and insurers. Any ambiguity over freedom of navigation can affect charter-party terms, war-risk premiums, voyage instructions and force-majeure assessments. Companies may also need to reassess contingency routing through Red Sea alternatives, although those routes are themselves under pressure from Houthi activity.

The overall risk remains high because a temporary arrangement may help stabilise the strait, but it also confirms that Hormuz governance is being renegotiated under crisis conditions. The main business issue is not simply whether ships can move, but whether the rules of movement become more politicised, less predictable and more expensive to navigate.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	HIGH
Economic	HIGH	Conflict	HIGH
Civil Unrest	LOW	Environment	HIGH
Crime	MODERATE	Legal	MODERATE

Libya — LNA intelligence chief killed as Zawiya refinery comes under drone attack — HIGH

Situation Update

On 10–11 August 2026, Libya faced two separate security shocks that reinforced the country's continuing fragmentation between rival military and political power centres. In eastern Libya, Maj. Gen. Fawzi al-Mansouri, director of military intelligence for Khalifa Haftar's Libyan National Army, was killed when an explosive-laden vehicle detonated near his car in Benghazi. The assassination targeted a senior security figure inside the LNA structure and will likely deepen concern over infiltration, internal rivalry and the vulnerability of high-ranking officials in areas nominally under eastern military control. The attack also comes at a sensitive moment for the LNA, which continues to project itself as the main guarantor of order in eastern Libya.

Separately, drone attacks struck Libya's Zawiya refinery complex in the west, triggering fires and raising the possibility of a full halt to operations. Libya's National Oil Corporation said the refinery may be forced to suspend activity after attacks hit key facilities, while additional coverage noted that the strike targeted oil infrastructure in a country already divided between competing authorities. The Zawiya complex is strategically important because it handles refining, storage and fuel distribution, and sits near a politically sensitive area west of Tripoli.

The coincidence of a senior assassination in the east and drone attacks on energy infrastructure in the west highlights Libya's dual vulnerability: elite security remains fragile, while oil and fuel assets continue to function as pressure points in political competition. Even where incidents are geographically separate, they reinforce the perception that Libya's security environment remains unstable and difficult to compartmentalise.

Assessment/Impact/Business Implications

For businesses, the immediate concern is the renewed exposure of personnel, oil facilities and critical infrastructure to targeted violence. The assassination of al-Mansouri points to continued security penetration in eastern Libya, while the Zawiya refinery attack shows that western energy infrastructure remains vulnerable to drones, sabotage or factional coercion. Companies operating in oil services, fuel distribution, logistics, aviation support, security contracting and infrastructure maintenance should assume elevated security requirements.

The Zawiya refinery risk is particularly important because disruptions can affect fuel supply, local power generation, transport, port activity and public sentiment. If operations are halted, even temporarily, businesses may face fuel shortages, price pressure, transport delays and higher operating costs. The incident may also affect confidence among foreign partners considering energy-sector engagement in Libya.

The overall risk remains high because Libya's instability is not confined to one theatre. The east faces targeted security attacks, while the west faces infrastructure disruption. For commercial operators, the practical implication is that localised incidents can rapidly affect national operating conditions, especially when they involve fuel, senior security personnel or facilities linked to rival political networks.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	MODERATE
Economic	HIGH	Conflict	HIGH
Civil Unrest	HIGH	Environment	HIGH
Crime	MODERATE	Legal	HIGH

Gaza / Israel — Netanyahu rejects Trump-backed Gaza plan — SEVERE

Situation Update

On 09 August 2026, Israeli Prime Minister Benjamin Netanyahu expressed his rejection of the plan outlined by US President Donald Trump to resolve the situation in the Gaza Strip. Israel has shown reluctance to accept the 15-point document, which calls for the withdrawal of the Israel Defense Forces (IDF) from the Strip in exchange for the total disarmament of the Palestinian militant group Hamas. The issue mainly revolves around the timing of the plan. Israel maintains that the IDF will not withdraw from Gaza before Hamas has been disarmed and its tunnels destroyed; conversely, Hamas insists that Israel must permanently halt attacks before implementation of the part of the agreement relating to its own disarmament begins. However, under pressure from the US, the televised statements coincided with a halt to attacks in the territory by the Israeli military. The latter decided to act only against what it considers immediate threats in Gaza and to cease the targeted killings it had been carrying out almost daily. Against this backdrop of tension, exacerbated by Netanyahu's domestic political difficulties — as he seeks re-election and finds himself balancing the expectations of his government with those of the US — on 10 August 2026, an official from the Board of Peace stated that President Donald Trump's plan for Gaza remains operative and that negotiations with Israel are ongoing.

Assessment/Impact/Business Implications

The plan outlined for the stabilisation of Gaza highlights an international diplomatic effort that continues to clash with the deadlock between the actors directly involved. Although there have been temporary signs of improvement — evidenced by an almost total absence of attacks for approximately one week — what prevails is a lack of trust between the parties. In an environment already devastated by conflict, hostilities have decreased, but they have not ceased entirely. This is demonstrated by the latest incident on 12 August 2026, in which an Israeli airstrike in northern Gaza resulted in one fatality and five injuries. The Israeli military stated that the operation targeted a Hamas commander who was planning attacks against the IDF. The entire area remains in a state of severe risk and such instability could trigger civil unrest, which in turn could lead to the looting of humanitarian aid, already heavily restricted by Israeli authorities.

In this context, the destruction of tunnels and the bombardments are contaminating underground water resources and destroying critical infrastructure. From a legal perspective, a violation of the ceasefire constitutes a breach of international commitments, placing the parties involved under the permanent scrutiny of the international community. Economically, the prolongation of hostilities undermines hopes of recovery and freezes future international reconstruction plans. For companies operating in the region, this translates into increased war-risk insurance premiums and growing instability of regional trade routes; this makes robust due diligence measures, business continuity plans, and protection protocols necessary for any operator present in the area.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	SEVERE
Economic	HIGH	Conflict	SEVERE
Civil Unrest	HIGH	Environment	HIGH
Crime	HIGH	Legal	HIGH

Morocco / Spain — Ceuta migration crisis enters social-media enforcement phase — HIGH

Situation Update

On 10 August 2026, in a post on X, the European Commission's Executive Vice-President for Tech Sovereignty, Security, and Democracy, Henna Virkkunen, stated that the platforms Meta and TikTok would cooperate with the European Union (EU) and Europol, the pan-European agency dedicated to combating crime, to monitor and verify online content relating to border crossings into Ceuta. The objective is to block or downrank content — on a voluntary but responsible basis — in order to counter viral videos and misleading information used by criminal networks to encourage migrants to attempt dangerous crossings. The platforms will introduce a cooperation mechanism with fact-checking organisations and remove content related to human trafficking. This decision follows the mass influx of 30 July 2026, when more than 70,000 people attempted to enter the Spanish enclave from Morocco, resulting in almost 100 fatalities. The event nevertheless represents only the tip of the iceberg of a structural phenomenon: it is, in fact, the latest in a series of migration crises that periodically affect Ceuta and Melilla, which constitute the EU's only land borders on African territory.

Assessment/Impact/Business Implications

The attempt by Moroccan citizens to reach the Spanish enclave highlights complex, multidimensional dynamics. From a political and public order perspective, the army's intervention to stabilise the area has placed the entire territory under an escalation alert; this scenario has fuelled protests by local residents following the government's inadequate response to the migrant influx crisis and incidents involving the irregular occupation of some homes. The phenomenon reflects large-scale migratory pressure affecting the whole of Europe, contributing to internal fragmentation within the EU that has already led some Member States to temporarily suspend the Schengen Agreement with Spain. From a legal perspective, the cooperation agreement with the European Commission requires Meta and TikTok to assume substantially greater responsibility for content moderation. Additionally, although the sudden concentration of tens of thousands of people in restricted border areas places unsustainable pressure on sanitation infrastructure, the agreement does not have any direct environmental consequences.

Economically, the outlook is twofold. On the one hand, the mass migratory flow reflects the critical situation in Morocco, where the unemployment rate remains very high (13% overall and approximately 37% among young people); this is compounded by precarious living conditions and government public spending focused heavily on major sports and transport infrastructure rather than on everyday social welfare. On the other hand, the perception of Europe as a stable economy offering abundant employment opportunities acts as a strong pull factor for younger segments of the population. For companies operating in the Iberian Peninsula and North Africa, customs restrictions at Ceuta and Melilla translate into logistical bottlenecks, delays in cross-border supply chains, and increased transport costs. Consequently, businesses in the region must implement robust business continuity plans and strict security protocols for personnel transiting through border hubs.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	HIGH
Economic	HIGH	Conflict	MODERATE
Civil Unrest	HIGH	Environment	LOW
Crime	HIGH	Legal	HIGH

Global Situational Awareness

Lebanon — Parliament abolishes death penalty in landmark legal reform — HIGH

Situation Update

On 11 August 2026, the Lebanese Parliament abolished the death penalty, making Lebanon the first country in the Arab world to replace this sentence with life imprisonment accompanied by aggravated hard labour. The draft law, already approved by members of three parliamentary committees on 09 July 2026, was ratified following a favourable vote by the majority of the 128 members of Parliament, with the sole and unequivocal exception of the parliamentary bloc affiliated with Hezbollah. However, significant uncertainties remain regarding its implementation: several parliamentarians highlighted that the terms and modalities for enforcing "aggravated hard labour" have not yet been clarified. The abolition amends Article 37 of the Penal Code to incorporate the new form of punishment, while simultaneously repealing Article 43 of the same code and Articles 420 to 424 of the Lebanese Code of Criminal Procedure, which governed procedures for carrying out death sentences. This legislative turning point comes in contrast to the regional geopolitical landscape. On 30 March 2026, the Israeli Knesset passed a restrictive law expanding the use of the death penalty (with wording oriented towards its almost exclusive application to Palestinian citizens), while on 21 June 2026, Jordanian authorities carried out the death sentences of six men by hanging.

Assessment/Impact/Business Implications

The historic abolition of the death penalty in Lebanon outlines complex institutional dynamics within a highly contrasting regional geopolitical context. From a political perspective, the ratification of the law highlighted a deep internal divide, defined by the opposing vote of the Hezbollah parliamentary bloc. Furthermore, this legislative reform has already triggered various disturbances involving the families of Lebanese soldiers and members of the security forces killed or attacked by Islamist militant groups, who have repeatedly protested against the law, and this could trigger further protests. From a legal perspective, the reform introduces substantial amendments to the Penal Code and the Code of Criminal Procedure. However, the introduction of life imprisonment with "aggravated hard labour" creates an immediate legal gap; the lack of a clear definition of the terms of application exposes the judicial system to significant interpretative uncertainties.

From an environmental standpoint, the impact associated with this legislative development is instead negligible, as there are no direct implications for natural resources or the territory. Economically, the decision could improve Lebanon's international image. However, the negative aspect lies in the critical condition of Lebanon's prison system, which is already structurally overcrowded and underfunded and will be further strained by the management of long-term life sentences, placing additional pressure on scarce state resources. For businesses operating in the country, the reform does not pose any direct or immediate threats to the security of assets or personnel. Nevertheless, increased political polarisation raises the systemic risk of institutional deadlock, and companies in the region are advised to monitor security in the vicinity of courthouses, which could become potential sites of future civil unrest.

Factor	Risk Rating	Factor	Risk Rating
Political	HIGH	Business	MODERATE
Economic	HIGH	Conflict	MODERATE
Civil Unrest	HIGH	Environment	LOW
Crime	MODERATE	Legal	HIGH

Saudi Arabia — Jazan refinery delay highlights Houthi pressure on energy routes — SEVERE

Situation Update

On 09 August 2026, the Yemen-based Houthi rebels claimed responsibility for a drone attack against the Saudi Aramco's refinery in Jazan, Saudi Arabia. The incident forced the oil giant to postpone the reopening of the facility until 30 August 2026, temporarily disrupting the facility's refining capacity, estimated at 400,000 barrels of crude oil per day. Although this was not the first attack against Aramco infrastructure in Jazan province, the incident significantly exacerbated concerns over regional stability. The action forms part of a dual strategic dynamic. On the one hand, it adds to the prolonged campaign of attacks conducted by the Houthis against Saudi airports (including Abha International Airport, King Khalid Air Base, and Najran Airport), commercial ports (such as Yanbu and Al-Makha), and shipping routes in the Red Sea. On the other hand, the offensive took place just two days after the signing of a strategic defence pact between Saudi Arabia, Türkiye, and Pakistan. The agreement was signed in response to growing regional tensions, exacerbated by Tehran's recent statements regarding the strict conditions required for the reopening of the Strait of Hormuz and by the recent Iranian missile attack against a commercial vessel from the United Arab Emirates.

Assessment/Impact/Business Implications

The attack on the Jazan refinery highlights the persistent vulnerability of Saudi Arabia's energy infrastructure and marks an escalation in the regional asymmetric conflict. The action undermines Saudi Arabia's deterrence efforts, taking place in open defiance of the new defence pact signed with Türkiye and Pakistan. Tehran's hostile rhetoric regarding the Strait of Hormuz and the attacks in the Red Sea indicate a coordinated strategy to exert strong geopolitical pressure on the Gulf monarchies. Legally, the targeting of civilian infrastructure and commercial vessels violates international treaties on freedom of navigation, pushing towards a tightening of the sanctions regime against suppliers of ballistic and drone technology to the rebels. From an environmental perspective, the postponement of operations immediately prevents large-scale spills, but the threat of future impacts on coastal oil facilities exposes the Red Sea marine ecosystem to a severe risk of hydrocarbon contamination.

From an economic standpoint, the temporary disruption of 400,000 barrels per day at Jazan generates immediate volatility in global energy markets, threatening to drive crude oil prices higher if the disruption is prolonged. Moreover, threats to block global maritime arteries risk triggering a new global supply chain crisis, forcing carriers to circumnavigate Africa. For companies operating in the Arabian Peninsula and the Oil & Gas sector, this scenario translates into an immediate increase in war-risk insurance premiums and the need to raise the physical and cyber security levels of assets. Consequently, companies in the region must implement robust business continuity plans, diversify land and maritime logistics routes, and apply strict evacuation and protection protocols for personnel stationed at sensitive nodes near the Yemeni border.

Factor	Risk Rating	Factor	Risk Rating
Political	SEVERE	Business	SEVERE
Economic	SEVERE	Conflict	SEVERE
Civil Unrest	MODERATE	Environment	HIGH
Crime	HIGH	Legal	HIGH

Global SA Risk Methodology

THREAT LEVEL RATING	
SCORE	LEVEL
5	SEVERE
4	HIGH
3	MODERATE
2	LOW
1	MINIMAL

Global Situational Awareness

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