

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

21 September 2026

Actionable Intelligence — Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

Saudi led coalition air defences intercepted a Houthi ballistic missile targeting Riyadh at dawn on 19 September, the first air raid alert in the capital since July; no casualties, but a fuel tank fire near King Khalid International Airport and severe flight disruption.

President Trump told Axios he faces a "big decision" on whether to "annihilate" the Iranian regime, ahead of a Tuesday UN General Assembly meeting with the leaders of all six GCC states (Saudi Arabia, UAE, Qatar, Bahrain, Kuwait and Oman) that could shape the war's next phase.

President Trump reportedly told Fox News he is in a "deciding mode" on Iran, weighing a deal, intensified economic pressure or a major military strike, with "very big things" described as coming soon.

The region enters Yom Kippur (from sundown today, 20 September) on heightened alert: on 19 September US missions activated security alerts across Israel, Saudi Arabia, Iraq, Lebanon, Jordan, Qatar, Bahrain, Oman and Kuwait, warning of a complex security environment with potential for unforeseen escalation and possible flight cancellations, airspace closures and travel disruption, with Dubai, Doha and Abu Dhabi flagged as vulnerable hubs.

Mohsen Rezaei, secretary of Iran's Supreme National Security Council, told Al Jazeera on 20 September that a further US strike is "very much on the cards" based on Iran's own assessment, and that Tehran is prepared for a "decisive war" unless Washington accepts its conditions (an end to the war on all fronts, release of frozen funds, and an end to the naval blockade); this is Iran's own stated assessment, not confirmed intelligence of an imminent US operation.

Saudi Arabia has still not confirmed or denied the Houthis' claim to have shot down an F15SA over Marib; aviation analysts say wreckage shows significant fire and fragmentation, and the fate of the two crew remains unknown to both sides publicly.

Iran staged its largest pro regime mobilisation since the war began on 18 September, with an estimated 300,000 to 330,000 people joining a state organised Janfada rally in Tehran; the Basij announced new volunteer units are being integrated into defense formations alongside the rally.

Hormuz remains at Day 203 of closure to normal commercial shipping; roughly 430 vessels are holding position away from port, and Brent crude was trading at \$103.87 as of this morning, little changed on the day.

Watch item: Whether the Houthis attempt further strikes on Riyadh following the first intercepted missile since July; whether Saudi Arabia confirms or denies the claimed F15 loss and the fate of its crew; whether Houthi control of Bab al Mandeb hardens further or draws a Saudi/US military response

COUNTRY RISK ASSESSMENTS

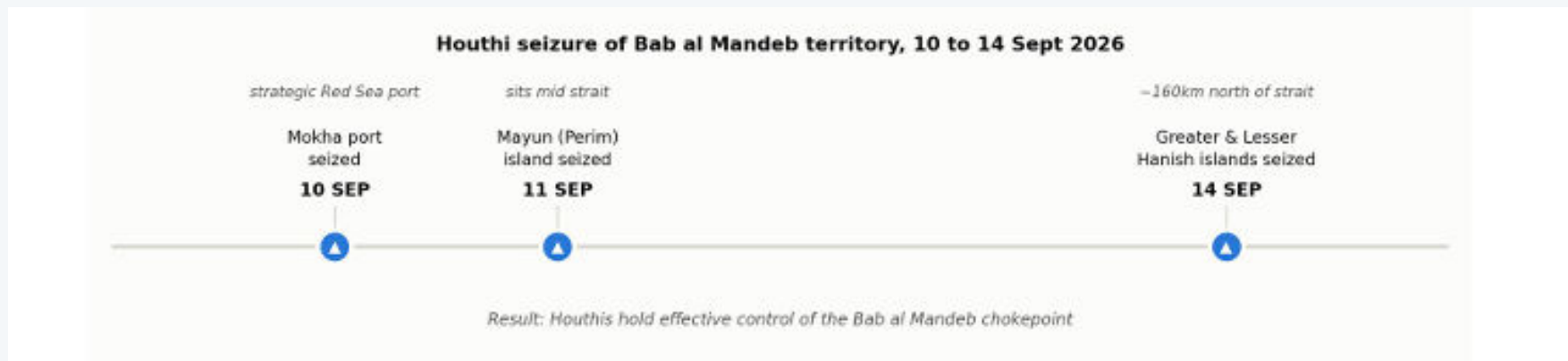
Saudi Arabia	▲ WORSENING	SEVERE
Kuwait	▶ WATCH	HIGH
UAE	▶ WATCH	HIGH
Oman	▶ WATCH	MODERATE
Bahrain	▶ WATCH	HIGH
Qatar	▶ WATCH	HIGH



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]

Hormuz, Gulf of Oman & Bab al Mandeb Update



Regional Risk Snapshot

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

RISK SCALE

LOW

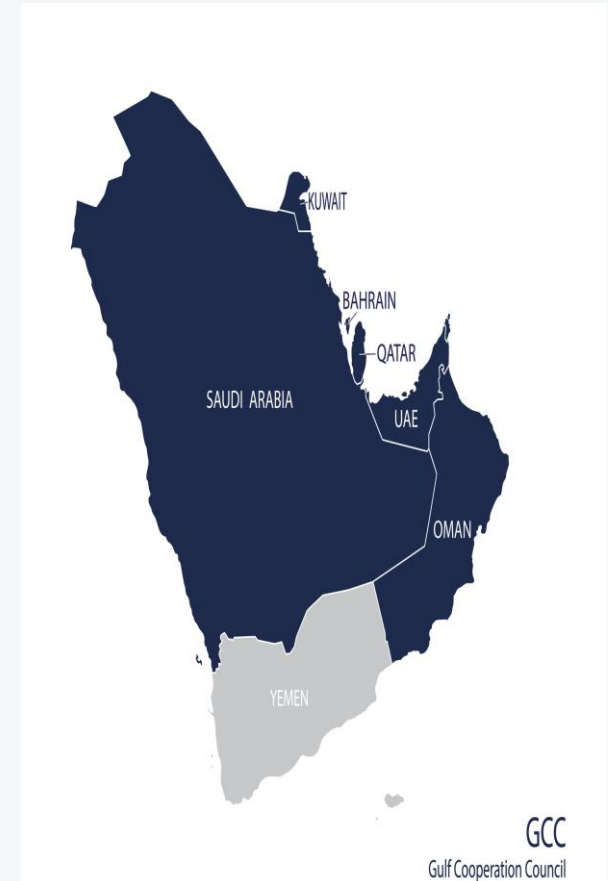
MODERATE

HIGH

SEVERE

CRITICAL

GCC MEMBER STATES





SECURITY SITUATION

Houthis claim broader strikes beyond the intercepted Riyadh missile, including on Aramco facilities at Yanbu and other “sensitive sites” in Riyadh (claim made 19 Sept, 18:23 BST); Saudi Arabia has not confirmed this.

US government employees in Saudi Arabia now require special authorization for all official and personal travel to Taif and Yanbu.

Saudi Arabia has still not confirmed or denied the Houthis' claim to have shot down an F15SA over Marib; aviation analysts say wreckage shows significant fire and fragmentation, and the fate of the two crew remains unknown to both sides publicly.



AVIATION

Riyadh (King Khalid Int'l) has largely recovered — Flightradar24's disruption index dropped from 5.0 (maximum, Saturday) to 1.0 (low) by Sunday morning: roughly 10% of departures delayed (~12 minutes average) and just 1% cancelled, down sharply from Saturday's missile-intercept disruption. Airlines advise checking individual flights, but the airport itself is back to near-normal.



MARITIME

Houthi forces have seized effective control of the Bab al Mandeb chokepoint over the past two weeks, capturing Mokha port, Mayun (Perim) island and the Greater/Lesser Hanish islands; Washington has so far declined Saudi calls for direct military intervention, instead running a parallel backchannel with Houthi representatives in Muscat, where the group reportedly pledged not to target US flagged shipping.



MOVEMENT — SUPPLY CHAIN

- Saudi Arabia's East-West pipeline remains mostly out of service, with repairs continuing on a timeline of several weeks. The pipeline was Saudi Arabia's main bypass around the Hormuz bottleneck, leaving the kingdom’s two main non-Hormuz export routes constrained simultaneously.
- Land-border connectivity remains broadly functional via the UAE, Bahrain (King Fahd Causeway), Qatar, Kuwait and Jordan crossings. The primary concern is maritime, not road. Maintain buffers for fuel pricing, insurance, vessel delays and customs; avoid just-in-time assumptions for chokepoint-dependent inputs.

RISK RATINGS

Political	HIGH
Business	HIGH
Economic	HIGH
Conflict	SEVERE
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.



SECURITY SITUATION

UAE-focused live incident tracker (UAE Defense Monitor) shows zero drone/missile engagements as of its most recent report (14 to 15 September) no fresh UAE-specific attack activity.

Mohsen Rezaei, secretary of Iran's Supreme National Security Council, told Al Jazeera on 20 September that a further US strike is “very much on the cards” based on Iran's own assessment, and that Tehran is prepared for a “decisive war” unless Washington accepts its conditions (an end to the war on all fronts, release of frozen funds, and an end to the naval blockade); this is Iran's own stated assessment, not confirmed intelligence of an imminent US operation.



AVIATION

Dubai and Abu Dhabi airports operated normally on 20 September, including flights to Riyadh; flydubai and Air Arabia continue to cancel select regional routes (Saudi Arabia, Bahrain, Kuwait).



MARITIME

- No new UAE-specific maritime developments in the last 24hrs.
- 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.



MOVEMENT — SUPPLY CHAIN

- UAE land connectivity remains one of the country's strongest resilience advantages.
- The Saudi border at Ghuwairat/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 and west.
- Maintain buffers for vessel delays, insurance review, air-freight disruption and maritime rerouting. Keep Saudi and Oman road alternatives

RISK RATINGS

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



MITIGATIONS & RECOMMENDATIONS

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's diplomatic mediation role (hosting/facilitating Iran-Qatar-US channels) continues, but nothing dated in the last day.

No new attacks. The main development is diplomatic and directly tied to Hormuz: Iran and Oman have reportedly finalized a framework for temporary shipping routes, to be presented to Gulf states (including Iraq) at Monday's Muscat meeting though an Iranian source cautioned this won't mean immediate reopening of the strait, and reopening still depends on US-Iran terms.



AVIATION

Airspace remains important to regional resilience, but routes around Musandam and the western Gulf of Oman stay exposed to wider military developments. Monitor NOTAMs, GNSS interference and any renewed US-Iran strike cycle affecting northern Muscat FIR routing.



MARITIME

Iran's IRGC Navy struck the Togo flagged tanker Trend in the Strait of Hormuz overnight into 19 September, per Sepah News; Rear Admiral Ali Ozmaei said the vessel attempted unauthorized passage "at the instigation and deception of the US military." UKMTO separately reported a vessel fire, since extinguished with no crew injuries, about 16 nautical miles off the Omani coast near Khasab.



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 & RECOMMENDATIONS

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

Bahrain remains one of the GCC's most sensitive environments given the US Fifth Fleet presence and limited strategic depth. No major new direct incident this period, but the near-collapse of commercial Hormuz traffic shows the underlying dispute is unresolved. Exposure is driven by the Washington–Tehran trajectory rather than domestic instability; a renewed strike cycle could quickly trigger air-defence activity and movement restrictions.

Bahrain announced (Sept 12) it will not attend any Hormuz-related meeting with Iran including Monday's planned Oman-hosted Gulf states meeting until diplomatic ties between Manama and Tehran are restored (severed since 2016). This is a real diplomatic complication for the Monday talks. No new kinetic attacks on Bahrain reported in this window.



AVIATION

Aviation remains open but highly sensitive. Regional missile, drone or air-defence activity can affect Bahrain FIR even without Bahrain being the target. Executive travel and time-sensitive cargo should proceed only after checking current flight status and NOTAMs.



MARITIME

Exposure is linked to the wider Gulf rather than a specific port shutdown. Near-zero Hormuz traffic reflects vessel avoidance, insurer caution and uncertainty over safe passage, which can delay cargo and raise war-risk costs even with normal port operations. Confirm vessel schedules and insurer approval before critical movements.



MOVEMENT — SUPPLY CHAIN

- The King Fahd Causeway is Bahrain's most important physical resilience corridor for passenger movement, freight, relocation and medical evacuation. Keep staff-accountability and relocation plans current; avoid unnecessary movement near sensitive facilities during heightened US-Iran activity.
- 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

RISK RATINGS

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



MITIGATIONS & RECOMMENDATIONS

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

No security incidents in this window. Qatari coverage over the past few days has been diplomatic (Doha reiterating it's working toward a diplomatic end to the war) rather than incident-related.

Qatar's Foreign Ministry issued a formal statement on 20 September condemning the Houthi missile attack on Riyadh as a "blatant violation" of Saudi sovereignty and international law, expressing "full solidarity" with Saudi Arabia and backing "every legitimate measure" to safeguard its security.



AVIATION

Airspace remains operational with indirect regional risk. Renewed US-Iran hostilities could affect neighbouring FIRs and Qatar-linked routing. Maintain diversion plans and monitor Bahrain, Kuwait, Iraq, Iran and northern Gulf conditions; air cargo demand may rise if maritime delays deepen.



MARITIME

Despite the scale of disruption, transit has not fully stopped: the laden Qatari LNG carrier AL MARROUNA cleared the Strait of Hormuz outbound for Port Qasim, Pakistan this week, illustrating that commercial traffic continues to move on a case-by-case basis rather than the waterway being closed outright.



MOVEMENT — SUPPLY CHAIN

- The Abu Samra/Salwa crossing with Saudi Arabia is Qatar's principal road-based resilience link. Domestic supply chains remain broadly functional, but prolonged Hormuz disruption raises exposure around LNG exports and maritime imports. Maintain cargo-delay buffers and review air-freight alternatives.
- 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 & RECOMMENDATIONS

Monitor LNG, maritime and aviation conditions; confirm insurer and port guidance; maintain Qatar–Saudi land-route options; keep executive travel flexible; treat any maritime resumption as positive but not full normalisation.



SECURITY SITUATION

No security incidents in this window.

Kuwait remains one of the GCC's most exposed states given its northern Gulf geography, critical power/water infrastructure and proximity to Iraq. No major new strike this period, but near-zero Hormuz traffic shows the confrontation is unresolved; renewed escalation could quickly return Kuwait to a missile/drone posture. A recently disrupted ISIS-linked plot against a vital facility reinforces the need to protect critical infrastructure from both external and domestic threats.



AVIATION

Aviation remains highly sensitive given proximity to Iraq, Iran and northern Gulf military activity. Renewed missile or drone operations could affect Kuwait FIR through air-defence activity or routing restrictions. Confirm flight status and NOTAMs before passenger, executive or cargo movement.



MARITIME

Exposure remains high as northern Gulf access ultimately depends on Hormuz. Near-zero weekend transit volumes show safe passage has not been restored; the main threat is vessel avoidance and war-risk pricing rather than port closure. Sustained incident-free Hormuz traffic would materially improve the outlook.



MOVEMENT — SUPPLY CHAIN

- Kuwait–Saudi crossings (Nuwaisib, Salmi) are the preferred overland resilience routes. The Iraq border remains operationally sensitive — do not route staff or time-sensitive cargo through it without current security review. Maintain three-day resilience planning for water, power, fuel and essential supplies.
- 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.

RISK RATINGS

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



MITIGATIONS & RECOMMENDATIONS

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 GCC-linked tanker is struck, disabled or suffers casualties in Hormuz.
- A Houthi attack strikes or sinks a Saudi-linked tanker in Bab el-Mandeb.
- US 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 stays below ten commodity vessels/day without a political breakthrough.
- Additional GCC-linked ships avoid Hormuz, turn back, or switch off AIS.
- 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
- War-risk insurer response to the latest tanker incidents
- Houthi enforcement of the Saudi maritime blockade
- Bahrain Fifth Fleet posture and public-safety alerts
- GCC aviation NOTAMs and GNSS-interference reporting

POSITIVE CONFIRMATION SIGNALS

- Hormuz records sustained growth in commercial traffic
- No further attacks occur against ADNOC or GCC-linked vessels
- Marine insurers restore wider cover without added restrictions
- Saudi oil movements resume through Bab el-Mandeb
- Iran and the US resume substantive negotiations
- GCC airspace remains open without major new restrictions

Look Ahead

Items to watch for next 24 hours

- President Trump is reported to have said he is in a “deciding mode” on Iran, weighing a deal, intensified economic pressure or a major military strike, with “very big things” described as coming soon.
- Further strikes on Saudi Arabia by the Houthis.

1

NEXT 72–96 HOURS

Watch for whether the Houthis follow the intercepted Riyadh missile with further strikes on the capital, and whether Saudi Arabia confirms or denies the claimed strikes on Aramco facilities at Yanbu. Watch also for any Saudi retaliatory action against Houthi positions, and for what comes out of Tuesday's UNGA meeting between Trump and all six GCC leaders.

2

NEXT 7–14 DAYS

If Houthi consolidation of Bab al Mandeb continues unopposed, expect further pressure on Saudi Arabia's Red Sea export contingency and a likely hardening of the current diplomatic fragmentation (the separate US Houthi and Iran Oman backchannels). Watch for whether Saudi Arabia moves toward large-scale retaliation following the first successful air raid alert on Riyadh since July, and whether Aramco meets its within days target for partially restoring East West pipeline capacity. The UN Panel of Experts' sanctions monitoring mandate lapses 26 September without a confirmed replacement mechanism in place.

3

NEXT MONTH

Absent a genuine diplomatic breakthrough on either backchannel, expect the current pattern to persist, intermittent strikes near Hormuz and the Saudi-Yemen border, continued Houthi consolidation of Red Sea territory, and Saudi Arabia's East-West pipeline remaining constrained through its multi-week repair window. A confirmed large-scale Saudi military response, a materially worse incident near a major Saudi population centre, or a verified breakthrough on either the US-Houthi or Iran-Oman track would each mark a genuine break from this baseline and should prompt an immediate reassessment.

MARKET SNAPSHOT

\$103.85

Brent crude / barrel

\$99.65

WTI crude / barrel

INDICATORS TO WATCH

- Iranian statements naming specific GCC states individually
- Evidence linking GCC territory or airspace to US strike operations
- Additional trade embargoes, port restrictions or airspace closures
- Shifts in aerial-refuelling patterns and force-protection posture
- Iranian boarding, inspection or tariff enforcement in Hormuz
- Emergency GCC meetings or coordinated defence announcements
- A shift from rhetorical warnings to published rules of engagement

ABOUT & CONTACT

Global Situational Awareness

Global Situational Awareness delivers decision-ready security intelligence to corporate security teams, travel risk managers and executive leadership operating across the Gulf Cooperation Council and the wider MENA region.



METHODOLOGY

Risk ratings (LOW to SEVERE) are professional judgements based on the information available at the time of writing and are not guarantees of outcome. Strike, infrastructure and operational risk are scored independently for each country and tracked week-on-week.



NOTICE & DISTRIBUTION

Operational status — airspace, border crossings and routes — can change without notice; confirm before moving people or goods. Verify aviation, maritime and land-border risk against official NOTAMs before operational decisions. Nothing here is financial, legal or insurance advice. Distribution is restricted to authorised recipients; do not forward without written authorisation.

Risk Matrix

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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