

GULF COOPERATION COUNCIL REGION

GCC Weekly Intelligence

1 October 2026

Information cut-off: 04:00 GST, 1 October 2026

Actionable Intelligence — Regional Protection



Executive Summary

BOTTOM LINE UP FRONT

Regional risk remains **SEVERE**, driven by the Saudi–Houthi front, renewed attacks on shipping and a hardening US–Iran stand-off. Four vessels were hit in Hormuz on 28–29 Sept, reportedly including a Kuwaiti VLCC, the first since 23 Sept; the shipping threat is now **SEVERE**. Iran has warned Gulf states after Netanyahu's Abu Dhabi visit and threatened regional infrastructure. No confirmed Houthi attack on Saudi Arabia since 26 Sept; reports of a fire near Abqaiq on 30 Sept are unconfirmed.

The US reply to Iran's seven-day Hormuz plan was delivered via Qatar on 29 Sept and Tehran is reviewing it as its deadline window closes; the sides reportedly agree on steps but not their order. **Rating changes this edition:** shipping threat to Severe (30 Sept); UAE trend to Worsening, Saudi Arabia to Watch.

Saudi Arabia: no confirmed Houthi attack since the 26 Sept intercepts (eight in September). EASA now advises EU airlines to avoid parts of the Jeddah FIR. The Crown Prince told the Shura Council Gulf security is “indivisible”.

Yemen (Houthi-reported): Saree claims 51 Saudi air and missile strikes in 24 hours to 30 Sept (1,209 since the escalation began), after a 27 Sept strike on a Taiz market. No coalition comment; Houthi retaliation likely.

Defence pact: Pakistan says it will defend Saudi Arabia “by whatever means”; no deployment announced. Turkey's parliament returns 1 Oct with ratification pending.

Maritime: UKMTO 143-26 to 146-26: four vessels hit in Hormuz on 28–29 Sept, reportedly Kuwait's Al Funtas and three tankers including two ADNOC ships (Seatrade). CENTCOM has redirected 125 vessels under the blockade (only three since 25 Sept); Yanbu war-risk premiums about 3% of hull value.

US–Iran: US reply delivered via Qatar on 29 Sept; Trump denies offering sanctions relief and says the US must decide whether to “blow them up” or “make a deal”. Iran's speaker Ghalibaf: “no infrastructure will remain safe” if Iran cannot sell oil.

Sanctions and aviation: US sanctions on 10 Iran arms suppliers include a Saudi-based firm (29 Sept); UK measures in force. flydubai FZ1073 diverted to Tabuk after the co-pilot attacked the captain.

Watch item: Iran's response to the US reply; confirmation of the Abqaiq reports; further UKMTO warnings; Iranian action against the UAE.

COUNTRY RISK ASSESSMENTS

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



PLANNING ASSUMPTION

Plan for continued **SEVERE** regional risk: Houthi strikes on Saudi Arabia, renewed attacks on shipping in Hormuz and no US–Iran deal in the near term. Movement remains possible across most of the GCC, but posture should stay elevated until a verified Hormuz arrangement is in place, attacks on shipping and on Saudi Arabia stop and the risk of renewed US strikes after 3 Nov recedes.

[ASSESSED — MODERATE CONFIDENCE]

Regional Risk Snapshot

COUNTRY	STRIKE	INFRA	OPS	TREND	ONE-LINE STATUS
Bahrain	HIGH	HIGH	HIGH	► WATCH	Hosts US 5th Fleet; no new incident. A man was jailed 10 years for posts backing Iran's attacks.
Kuwait	HIGH	HIGH	HIGH	► WATCH	Kuwaiti VLCC Al Funtas hit in Hormuz 28 Sept; airport open, FIR closed to overflights.
Qatar	MODERATE/HIGH	HIGH	MODERATE/HIGH	► WATCH	Delivered the US reply to Iran 29 Sept; LNG force majeure extended into December.
UAE / Dubai	MODERATE/HIGH	MODERATE	MODERATE/HIGH	▲ WORSENING	Iran warns after Netanyahu visit; ADNOC tankers reportedly hit; fuel up 16% from 1 Oct.
Saudi Arabia	SEVERE	HIGH	HIGH	► WATCH	No confirmed attack since 26 Sept; EASA avoid advice for parts of Jeddah FIR; Abqaiq reports unconfirmed.
Oman	MODERATE	HIGH	HIGH	► WATCH	Iran threatens airports that ground its airlines, naming Oman; STS transfers off Sohar at capacity.

RISK SCALE

LOW

MODERATE

MODERATE/HIGH

HIGH

SEVERE

CRITICAL

GCC MEMBER STATES



Primary Threat Picture

THREAT	ACTOR	MOST EXPOSED	LEVEL	TREND
Houthi missile and drone strikes on Saudi Arabia	Houthis (Yemen)	Jazan, Najran and Asir; Taif, Mecca and Yanbu; Riyadh	SEVERE	► WATCH
Attacks on commercial shipping	Iran/IRGC (claimed); recent strikes unattributed	Tankers in Hormuz, Musandam and the Gulf of Oman; Red Sea if a second front opens	SEVERE	▲ WORSENING
Strikes on Saudi energy exports	Houthis; Iraq-based groups (11 Sept pipeline attack)	Yanbu terminal, East-West pipeline, southern Aramco sites	HIGH	► WATCH
Renewed US-Iran hostilities spilling into the GCC	Iran; US	US bases in Bahrain, Qatar, Kuwait, UAE; US naval forces in Hormuz; Red Sea if Iran widens the war	HIGH	▲ WORSENING
Aviation disruption	US-Iran conflict; Houthi strikes; Iran (UAE dispute)	Foreign carriers' Gulf routes; Gulf waters and parts of the Jeddah FIR under EASA avoid advice	HIGH	► WATCH

Levels use the Daily GCC Security & Risk Briefing scale. WORSENING = direction over the last 24 hours. Unverified claims (Iran's 19-ship claim, Abqaiq fire reports) are flagged in the Daily and do not move levels.

MOST LIKELY — NEXT 7 DAYS

Iran rejects or counters the US reply but talks continue via Qatar; further strikes on shipping in Hormuz; a Houthi salvo on Saudi Arabia, mostly intercepted.

MOST DANGEROUS

Iranian strikes on Gulf energy infrastructure or GCC states hosting US forces, the UAE in particular, or a successful strike on Abqaiq, Yanbu or a Saudi city.

WHAT WOULD MOVE THE LEVELS

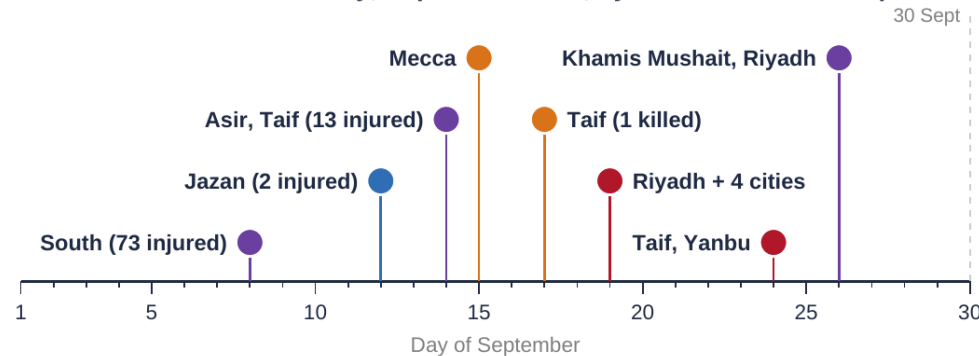
Trigger met: four vessels hit 28–29 Sept; Maritime raised to SEVERE.

Iran rejects the US reply or talks collapse: US-Iran row to SEVERE.

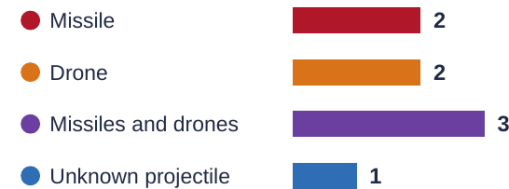
Confirmed strike on Abqaiq, Yanbu or a Saudi city with casualties: immediate reassessment.

September Attack Picture

Houthi attacks on Saudi territory, September 2026, by attack method as reported

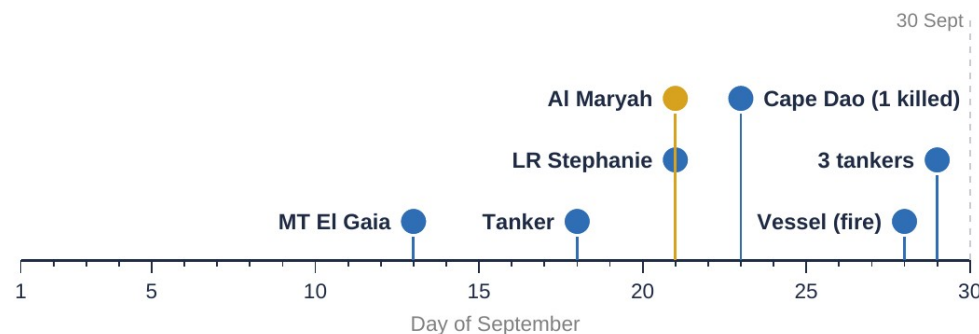


Attacks by reported method

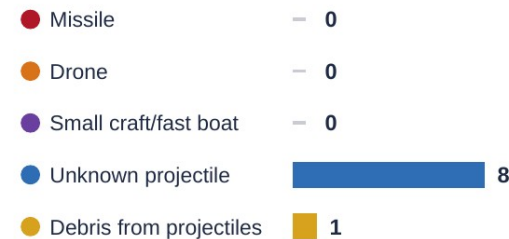


Confirmed attacks only: 8 attacks, 90 injured, 1 killed. Houthi-only claims not shown.

Commercial vessel strikes, September 2026, by attack method as reported



Incidents by reported method



Missile, drone and small-craft counts are confirmed cases only; none confirmed yet.

WHAT THE CHARTS SHOW

Saudi Arabia: 8 confirmed Houthi attacks in September (90 injured, 1 killed); the latest on 26 Sept, all intercepted. Strikes have moved from the south to Taif, Yanbu and Riyadh.

Shipping: 9 incidents involving commercial vessels, four of them in Hormuz on 28-29 Sept, including three tankers on 29 Sept (UKMTO 144-26 to 146-26). UKMTO has not identified the weapon in any case.

Confirmed by Saudi/coalition statements or UKMTO only.

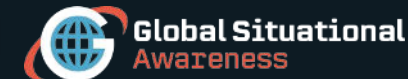
NOT COUNTED (UNCONFIRMED)

- Iran's claim to have hit 19 ships, 25-26 Sept (Fars)
- Reported naval clash near Sirik, 26 Sept
- Jazan attacks claimed 7 and 25 Sept
- Houthi claims on Riyadh, Yanbu and Sharurah
- 11 Sept pipeline drone attack (from Iraq)



Saudi Arabia

SEVERE



▶ WATCH



SECURITY SITUATION

26 Sept: air defences intercepted two ballistic missiles aimed at Khamis Mushait and two drones aimed at Riyadh (coalition spokesperson Turki al-Maliki); no damage. Eight confirmed Houthi attacks on Saudi territory in September (90 injured, 1 killed).

Shura address: the Crown Prince said recent attacks show the “indivisibility of Gulf security”, backed the coalition against the Houthis and condemned attacks in Gaza and at Al-Aqsa (30 Sept, Arab News).

Unconfirmed: IRNA and social media report a fire at an Aramco site west of Abqaiq on 30 Sept; no Saudi, Aramco or Houthi statement.



AVIATION

EASA (30 Sept) advises EU airlines to avoid parts of the Jeddah FIR, citing Houthi attacks on Riyadh, Tabuk and Yanbu. flydubai FZ1073 diverted to Tabuk after the co-pilot attacked the captain; Riyadh refused Israeli rescue aircraft (Reuters). Cathay suspends Riyadh to Jan 2027.



MARITIME

Yanbu loadings are about 2–2.6m bpd and rising (Kpler via Gulf News). War-risk premiums for Yanbu tankers have tripled to about 3% of hull value, Jizan about 7% (Bloomberg). French air defences for Yanbu not yet reported as arrived.



MOVEMENT — SUPPLY CHAIN

- Hormuz flows are volatile, with estimates of 7–13m bpd, and the Red Sea route is exposed to Houthi strikes. Brent was \$103.73 early on 30 Sept.
- Land-border connectivity remains functional via the UAE, Bahrain (King Fahd Causeway), Qatar, Kuwait and Jordan. Maintain buffers for fuel, 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

Review shelter and alert procedures in Riyadh, Khamis Mushait, Abha, Jazan, Taif and Yanbu; reinforce debris-awareness guidance after interceptions; confirm war-risk cover for Red Sea and Hormuz cargo; keep land-route alternatives live.



SECURITY SITUATION

Iranian warning: after Netanyahu met MBZ in Abu Dhabi (27 Sept), Iran warned of “extremely dangerous consequences”; its speaker says “no infrastructure will remain safe” if Iran cannot sell oil.

Iranian airlines: the UAE ban since 24 Sept continues; a reported Iranian airspace ban on UAE carriers is still unconfirmed.

Maritime: No direct attack on UAE territory; two ADNOC tankers are reported among the vessels hit in Hormuz.



AVIATION

UAE hubs operate normally; EASA's Gulf avoid advice runs to 16 Nov. flydubai has suspended all Israel flights pending the FZ1073 investigation. Air Canada is off Dubai to March 2027 and Cathay to Jan 2027; Lufthansa, Swiss and BA plan returns late Oct–Nov.



MARITIME

ADNOC's Mersin Prosperity and Al Ruwais are reported among the vessels hit on 28–29 Sept (Seatrade; not confirmed by UKMTO or ADNOC). Iran is tightening its transit-approval rules.



MOVEMENT — SUPPLY CHAIN

- Fujairah and Khor Fakkan, outside Hormuz, remain the key bypass ports.
- Land links to Saudi Arabia (Ghuwaifat/Al Batha) and Oman (Hatta, Khatmat Malaha) remain open and important for freight and relocation.
- Fuel prices rise about 16% (petrol) and 12% (diesel) from 1 Oct, adding to transport costs (Khaleej Times).

RISK RATINGS

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



MITIGATIONS & RECOMMENDATIONS

Confirm routings and NOTAMs for flights crossing Iranian airspace; screen counterparties for Iran exposure after the banking restrictions; verify war-risk cover; keep UAE–Saudi and UAE–Oman land routes live.



SECURITY SITUATION

Iranian threat: Iran said on 23 Sept that airports helping ground its airlines, naming Oman, “will not be able to operate” (Iran International).

Sanctions: Mahan Air halted; Iran says all Iranian flights to Muscat stopped from 23 Sept (no Omani statement).

Territory: No new attack on Omani territory. Oman mediates alongside Qatar and Pakistan.



AVIATION

Muscat and Salalah are operating normally; Iranian flights reportedly halted. EASA advises avoiding the western Gulf of Oman in the Muscat FIR; monitor NOTAMs and GNSS interference.



MARITIME

Four vessels were hit in Hormuz on 28–29 Sept (positions not given), after Cape Dao off Musandam on 23 Sept. Ship-to-ship transfers off Sohar are at capacity, each taking about 10 days (gCaptain).



MOVEMENT — SUPPLY CHAIN

- Sohar, Duqm and Salalah provide bypass capacity outside Hormuz, but their wider maritime connections remain exposed.
- Oman–UAE crossings remain open; the Sharjah–Sohar corridor carried Dh1.7bn of goods in its first three months.
- Maintain inventory buffers for goods dependent on Gulf shipping.

RISK RATINGS

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



MITIGATIONS & RECOMMENDATIONS

Follow Omani, UKMTO and JMIC routing guidance; verify war-risk insurance; keep AIS active where required; maintain UAE land-route alternatives; treat any Hormuz arrangement as unconfirmed until owners and insurers accept it.



SECURITY SITUATION

Posture: No new incident 28–30 Sept. Bahrain remains one of the most exposed GCC states given the US Fifth Fleet presence; US carriers are operating in the Arabian Sea with no Bahrain port calls reported.

Legal: A court jailed a man for 10 years for social-media posts backing Iranian attacks; prosecutors say reposting is also a crime (GDN). Brief staff accordingly.



AVIATION

Bahrain International is operating normally; Gulf Air resumed Kuala Lumpur flights on 29 Sept. EASA's Gulf avoid advice (to 16 Nov) covers the Bahrain FIR except arrivals and departures.



MARITIME

No port disruption. Four vessels hit in Hormuz on 28–29 Sept add cost and delay for Gulf cargo; confirm vessel schedules and insurer approval before critical movements.



MOVEMENT — SUPPLY CHAIN

- The King Fahd Causeway remains Bahrain's key resilience corridor for passenger movement, freight, relocation and medical evacuation.
- AWS says it cannot restore its Bahrain cloud region after September's damage; check IT continuity for Bahrain-hosted services.

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

Mediation: Qatar delivered the US reply to Iran's Hormuz plan on 29 Sept and mediates with Oman and Pakistan; al-Ansari says threats to vital infrastructure violate international law.

Territory: No attack on Qatari territory. Iran has revived demands over three pilots missing since March; Qatar denies holding them. Private drones allowed again in designated zones from 30 Sept.



AVIATION

Hamad International is operating normally; EASA's Gulf avoid advice for the Doha FIR runs to 16 Nov. Disruption risk rises sharply if US-Iran strikes resume.



MARITIME

QatarEnergy has extended LNG force majeure into early December (The National). The vessel first reported as an LNG tanker hit on 29 Sept was an oil-products tanker (Seatrade).



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.
- Maintain cargo-delay buffers, verify insurer and shipping conditions, and review air-freight alternatives for inputs that depend on Hormuz or Bab el-Mandeb.

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

Maritime: Kuwait's VLCC Al Funtas (KOTC) was hit by a projectile in Hormuz on 28 Sept; fire out, crew safe (Lloyd's List; Maritime Executive). No attack on Kuwaiti territory.

Iraq: The US-led coalition completed its withdrawal from Iraq on 30 Sept, a factor for drone risk from Iraq; drones from Iraq hit the East-West pipeline on 11 Sept.

Food safety: New Health Ministry radioactivity limits apply to imported food, water and feed; importers should check compliance.



AVIATION

Kuwait International is open for approved arrivals and departures; the FIR stays closed to overflights (NOTAM to about 2 Oct). Jazeera Airways resumes transit passengers via T5 from 1 Oct; Air Arabia cut some UAE-Kuwait flights on 28 Sept.



MARITIME

Ports (Shuwaikh, Shuaiba) were not struck. KPC is moving naphtha by ship-to-ship transfer off India and Sohar to bypass Hormuz, adding cost and lead time for Kuwait trade.



MOVEMENT — SUPPLY CHAIN

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

RISK RATINGS

Political	HIGH
Business	HIGH
Economic	HIGH
Conflict	HIGH
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



- Casualties in a strike on shipping, or a GCC-flagged tanker disabled in Hormuz or the Gulf of Oman.
- A confirmed strike on Abqaiq, Yanbu, the East-West pipeline or a Saudi city with casualties.
- US and Iranian forces enter a direct exchange around Hormuz, or US strikes on Iran resume.
- Iran retaliates with missiles or drones against GCC territory.

AMBER — WATCH



- Iran rejects the US reply outright or talks collapse.
- Iran enforces its transit rules by boarding, seizing or turning back ships.
- Houthi salvos on Saudi Arabia continue at the current tempo.
- Bahrain or Kuwait reactivates public-safety or air-defence alerts.

GREEN — IMPROVING



- Hormuz transits recover above 20 a day with no new attacks for a week.
- Iran and the US confirm an implementable mechanism for commercial passage.
- Houthi attacks on Saudi Arabia pause for a sustained period.

ADDITIONAL WATCH ITEMS

- UKMTO warnings (next 147-26) and daily Hormuz counts
- Confirmation of the Abqaiq fire reports
- Iran's response to the US reply
- Turkish ratification of the defence pact after 1 Oct
- EASA Jeddah FIR advice and carrier responses
- Iranian confirmation of the UAE airspace ban

POSITIVE CONFIRMATION SIGNALS

- Hormuz traffic grows for several days in a row
- No further attacks on GCC-linked vessels
- Yanbu loadings sustained above 3m bpd
- Insurers restore wider war-risk cover
- The US and Iran resume substantive talks
- Houthi attacks on Saudi Arabia decline

Look Ahead

Items to watch before Monday's edition

- Iran's response to the US reply delivered via Qatar on 29 Sept, and any Iranian action in Hormuz after four vessels were hit on 28–29 Sept.
- Confirmation or denial of reports of a fire near Abqaiq; any Houthi claim; oil moves.

1

NEXT 72 HOURS (TO MONDAY)

Turkey's parliament returns 1 Oct with the defence pact awaiting ratification; Jazeera Airways restarts Kuwait transit traffic and UAE fuel prices rise on 1 Oct. Watch for the next Houthi salvo on Saudi Arabia, EASA's Jeddah FIR details and Israel's decision on flydubai.

2

NEXT 7–14 DAYS

Absent a deal, expect Iran to keep up pressure on shipping and Houthi strikes on Saudi Arabia to continue, mostly intercepted. A Turkish or Pakistani deployment under the pact would be a major signal. Qatari LNG force majeure runs into December.

3

NEXT MONTH

Trump is reported to expect a new bombing campaign on Iran after the 3 Nov midterms. Absent a deal before then, plan for continued SEVERE regional risk, restricted Hormuz traffic and Houthi pressure on Saudi Arabia. A confirmed US–Iran framework, a mass-casualty strike on a Saudi city or direct Iranian strikes on GCC states would each trigger immediate reassessment.

MARKET SNAPSHOT

\$103.73

Brent crude / barrel (30 Sept)

\$89.72

WTI crude / barrel (30 Sept)

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, MODERATE, MODERATE/HIGH, HIGH, SEVERE, 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.



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Prepared by: MENA Analyst | **Quality assurance:** Senior Analyst

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.
Moderate/ High	Elevated tension or exposure with no recent direct attack on the state. Disruption is possible but not currently occurring.	Hostilities nearby: threats or claims naming the state: sanctions or aviation measures: no confirmed strike on its territory or shipping.	Heightened monitoring with contingency plans ready: confirm insurance and alternative routes: review movements before travel.
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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