



Risk Report

Middle East Regional Snapshot

Summary of the key security and
operational risks amid the regional conflict

Issued: 7th May 2026

Authored by: Alice Duman – Regional Intelligence Analyst (MENA)

Summary – Security Risk Environment

	BAHRAIN	IRAN	ISRAEL	JORDAN	SAUDI ARABIA	KUWAIT	LEBANON	OMAN	QATAR	UAE
SECURITY RISK	MODERATE	EXTREME	MODERATE	MODERATE	MODERATE	LOW	HIGH	LOW	LOW	LOW
SECURITY TREND	STABLE	DETERIORATING	STABLE	STABLE	STABLE	STABLE	DETERIORATING	STABLE	STABLE	STABLE

Key Developments	Mainline Assessments	Most Likely Forecast - Regional				
<ul style="list-style-type: none"> Iran, Israel, and the US have been adhering to a ceasefire since 8th April. In the initial days of the ceasefire, Iranian-aligned militant groups based in Iraq were blamed for strikes directed at some Gulf states. Iran refrained from conducting large-scale strikes on Gulf targets until 4th May; drone attacks in Iraqi Kurdistan and maritime incidents related to the US port blockade persisted. President Trump announced the launch of <i>Operation Project Freedom</i> on 4th May, describing it as a defensive initiative intended to guide stranded commercial vessels through the Strait of Hormuz. On the same day, Iran struck the Fujairah oil zone in the UAE and a residential building in Oman’s Musandam governorate. The UAE reactivated its air defence systems on 5th May, reportedly in response to renewed Iranian projectiles. US officials confirmed that <i>Project Freedom</i> had been paused after two days of operations on 6th May to allow further negotiations with Iran, although the US naval blockade of Iranian ports remains in place. 	<ul style="list-style-type: none"> If the ceasefire holds, any kinetic activity is likely to remain geographically limited and target vessels. Should the ceasefire collapse, US-Israeli coalition strikes in Iran would likely resume. The US retains the option of conducting limited, precision strikes against tactical Iranian targets to extract concessions without escalating into a full-scale campaign. In response, Iran could target critical Gulf infrastructure to signal retained strike capability, though such actions would likely be calibrated in scope and intensity to avoid triggering a direct US response. The Hezbollah–Israel conflict is likely to persist along a distinct trajectory from the Iran-related conflict, despite Iranian efforts to incorporate Hezbollah into any broader ceasefire arrangement with the US and Israel. 	<table border="1"> <tr> <td>Likelihood</td> <td>Likely (55%-75%)</td> </tr> <tr> <td>Timeframe</td> <td>Through 16th May</td> </tr> </table> <ul style="list-style-type: none"> The most plausible near-term outcome is a memorandum of understanding (MoU) rather than a comprehensive nuclear deal. No second round of direct talks has taken place since the Islamabad discussions on 11th – 12th April, and Trump has stated he will not dispatch a delegation until core differences narrow. However, if the US concludes that Iranian leadership cannot form a unified negotiating position in the coming weeks, the risk of ceasefire collapse and a renewed US-Israeli campaign will increase. An uncontained series of coalition attacks would likely follow, with broader regional escalation driven by Iranian retaliation. 	Likelihood	Likely (55%-75%)	Timeframe	Through 16 th May
Likelihood	Likely (55%-75%)					
Timeframe	Through 16 th May					

Summary – Operational Risk Environment

	BAHRAIN	IRAN	ISRAEL	JORDAN	SAUDI ARABIA	KUWAIT	LEBANON	OMAN	QATAR	UAE
OPERATIONAL RISK	LOW	HIGH	MINIMAL	MODERATE	LOW	LOW	HIGH	LOW	LOW	LOW
OPERATIONAL TREND	STABLE	RAPIDLY DETERIORATING	STABLE	STABLE	STABLE	STABLE	DETERIORATING	STABLE	STABLE	STABLE

Key Developments	Mainline Assessments	Most Likely Forecast - Regional				
<ul style="list-style-type: none"> Airports & Air Operations: All airspace in the region is open, as of 7th May; however, airspace avoidance over countries such as Iran, Iraq, Syria, and Yemen persist. The UAE's airspace was temporarily restricted following the alleged Iranian attacks against its territory on 4th and 5th May. Business Operations: Excluding the UAE, which moved to remote learning until 8th May following projectile activity on 4th May, most if not all regional countries have resumed business as usual. Supply Chain Availability: The GCC states, which import about 85% of their food stuffs, are experiencing supply pressures. Prices for essential goods, including medicines and pharmaceuticals, have reportedly increased by up to 30%. 	<ul style="list-style-type: none"> Airports & Air Operations: Airspace across the region will remain open under contingency operating conditions. Airline-led avoidance of Iran, Iraq, Syria, and Yemen will persist regardless of state-level airspace statuses. Gulf carriers will continue rebuilding capacity, while most non-Gulf international airlines will retain reduced schedules through at least the end of June. Short-notice airspace clearances and ground stops at major Gulf hubs remain a realistic possibility in the event of renewed projectile activity. Business Operations: Business operations will largely continue across the region, although will remain dependent on localised projectile incidents and air defence activations. Supply Chain Availability: Strait of Hormuz transit will remain severely constrained for as long as the US blockade of Iranian ports and Iranian transit restrictions remain in place. 	<table border="1"> <tr> <td>Likelihood</td> <td>Likely (55%-75%)</td> </tr> <tr> <td>Timeframe</td> <td>Through 16th May</td> </tr> </table> <ul style="list-style-type: none"> Gulf states continue with business as usual, while remaining alert for the continuously elevated conflict tensions in the region, particularly along the Persian Gulf and Gulf of Oman. The US naval blockade of Iranian ports remains in place until Iran signals a deal can be achieved; if lifted as part of a future US-Iran agreement, this would allow for an incremental increase in maritime traffic through the Strait. However, any such lifting would have longer-term rather than immediate implications for supply chain pressures. Airlines continue to operate outbound and inbound flight operations. Shipping through the Strait of Hormuz remains severely restricted compared to pre-conflict levels. 	Likelihood	Likely (55%-75%)	Timeframe	Through 16 th May
Likelihood	Likely (55%-75%)					
Timeframe	Through 16 th May					

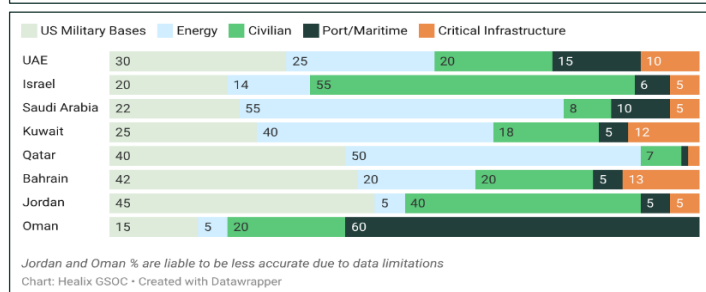
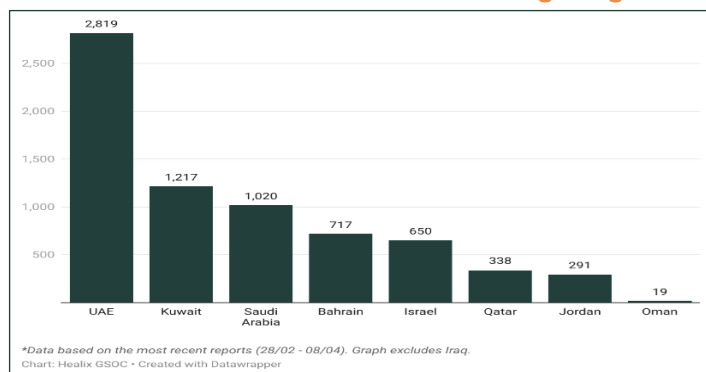
SECURITY RISK TRACKER - DRONE AND MISSILE STRIKES										
	BAHRAIN	IRAN	ISRAEL	JORDAN	SAUDI ARABIA	KUWAIT	LEBANON	OMAN	QATAR	UAE
ATTACK VOLUME	MINIMAL	MINIMAL	MINIMAL	MINIMAL	MINIMAL	MINIMAL	MAJOR	MINIMAL	MINIMAL	MODERATE (S1)
ATTACK FREQUENCY	MINIMAL	MINIMAL	DAILY (S2)	MINIMAL	MINIMAL	MINIMAL	DAILY	INTERMITTENT	MINIMAL	INTERMITTENT (S1)
TARGETING	N/A	N/A	MILITARY	N/A	N/A	N/A	URBAN CENTRES (S3)	URBAN CENTRES (S4)	N/A	INF/ GOVT (S5)
INTERCEPTION RATES	N/A	N/A	EXTENSIVE	N/A	N/A	N/A	EXTREMELY LIMITED*	N/A	N/A	EXTENSIVE*
RHETORIC	STABLE (S6)	EXPRESSED	HOSTILE	STABLE (S6)	STABLE (S6)	STABLE (S6)	EXPRESSED	STABLE (S6)	STABLE (S6)	STABLE (S6)

*Estimation due to data limitations

SERIAL	COUNTRY	FACTOR	TREND	RATING	DESCRIPTION
S1	UAE	ATTACK VOLUME & FREQUENCY	STABLE	MODERATE/ INTERMITTENT	Despite Iran not targeting the Gulf since the ceasefire between Iran, Israel, and the US went into effect on 8 th April, following the US's launch of <i>Operation Project Freedom</i> on 4 th May, Iran fired 19 projectiles towards the UAE's Fujairah oil zone on 4 th May and then the Emirati authorities announced on 5 th May that air defence systems were activated again. To differentiate the UAE from the other regional countries, the attack frequency has been assessed as intermittent. The trends for both remain stable as these attacks are assessed as outliers and contingent on the US's <i>Operation Project Freedom</i> in the Strait of Hormuz.
S2	ISRAEL	ATTACK FREQUENCY	DETERIORATING	DAILY	Despite the ceasefire between Israel and Lebanon, which Hezbollah publicly committed to observe, projectile launches toward northern Israel continue. As Israel Defense Forces (IDF) operations have pushed Hezbollah militants further north within Lebanon, the majority of Hezbollah projectiles are intercepted before entering Israeli airspace, with hostilities increasingly concentrated in southern Lebanon. However, ongoing exchanges indicate sustained hostilities, with attack frequency assessed as daily and the overall trend as deteriorating.
S3	LEBANON	TARGETING	DETERIORATING	URBAN CENTRES	Despite the ceasefire in place, Israeli military operations inside Lebanon continue. The IDF has reportedly established a so-called "Yellow Line" in southern Lebanon, with direct hostilities persisting in villages across the area. Until 6 th May, Israel had

					refrained from striking Beirut since <i>Operation Eternal Darkness</i> on 8 th April, which targeted Hezbollah infrastructure and personnel in southern Lebanon, Beirut, and the Bekaa Valley. On 6 th May, however, Israeli airstrikes struck Beirut's southern suburbs, reportedly killing a senior Hezbollah Radwan Force commander, and marking the first Israeli strike on the capital since the Israel–Lebanon ceasefire took effect on 17 th April.
S4	OMAN	TARGETING	STABLE	URBAN CENTRES	The Omani exclave of Musandam Governorate was struck by Iranian projectiles on 4 th May, with a residential building targeted. While this constitutes an attack on an urban centre in Oman, the incident is assessed as a rogue and likely miscalculated outlier rather than part of a deliberate targeting pattern. As such, the overall threat trend for Oman remains stable.
S5	UAE	TARGETING	DETERIORATING	INF/GOVT	Following the launch of the US's <i>Operation Project Freedom</i> on 4 th May, Iran fired 19 projectiles toward the UAE's Fujairah oil zone later the same day. Emirati authorities subsequently confirmed the reactivation of air defence systems on 5 th May. This activity marks a deterioration in the targeting trend, signalling an expansion in Iranian targeting compared to the absence of attacks between 8 th April and 4 th May.
S6	GULF / JORDAN	RHETORIC	STABLE	STABLE	Rhetoric surrounding Iran and the wider regional conflict has remained broadly stable. Official rhetoric continues to emphasise condemnation of Iranian "aggression", calls for de-escalation, and periodic increases in hostile rhetoric aligned with fluctuations in Iranian–US military escalations.

Total Iranian Strike Quantities and Targeting Patterns of Iranian Strikes (28th February – 8th April)



Iran retaliated for US-Israeli attacks by striking multiple countries across the Middle East, with the focus of attacks shifting, as the conflict progressed, from military installations to civilian and critical infrastructure as a tool of economic coercion. Despite official Iranian claims that retaliatory strikes were aimed exclusively at US-affiliated installations, the trend indicated that Iranian targeting extended beyond US assets. Energy infrastructure and civilian airports, as well as commercial and residential districts were hit, either by direct projectiles or falling debris after interceptions. As the conflict progressed, Iran increasingly focused on energy and maritime assets across the Gulf, with strikes impacting oil facilities and desalination infrastructure. This pattern indicated Iran's deliberate escalation as a tool of coercion. This coercion-through-infrastructure logic significantly elevates risks in the vicinity of any energy or industrial facility across the Gulf in the event of renewed hostilities, irrespective of direct US military association.

OPERATIONAL RISK TRACKER										
	BAHRAIN	IRAN	ISRAEL	JORDAN	SAUDI ARABIA	KUWAIT	LEBANON	OMAN	QATAR	UAE
HEALTHCARE SYSTEM	SOME	CRITICAL (O4)	NORMAL	NORMAL	NORMAL	NORMAL	CRITICAL (O2)	NORMAL	NORMAL	NORMAL
AIRPORTS & AIR OPERATIONS	SOME	CRITICAL (O4)	SOME	SOME	SOME (O6)	SOME	SIGNIFICANT	NORMAL	SOME	SOME (O1)
SUPPLY CHAIN RELIABILITY	SIGNIFICANT (O5)	CRITICAL (O4)	SOME	SOME	SOME	SIGNIFICANT (O5)	SIGNIFICANT	SOME	SIGNIFICANT (O5)	SIGNIFICANT (O5)
BUSINESS OPS & COMMERCE	SIGNIFICANT	CRITICAL (O4)	SOME	NORMAL	SOME	SOME	CRITICAL (O3)	NORMAL	SIGNIFICANT	SIGNIFICANT

SERIAL	COUNTRY	FACTOR	TREND	RATING	DESCRIPTION
O1	UAE	AIRPORTS & AIR OPERATIONS	STABLE	SOME	The UAE's General Civil Aviation Authority (GCAA) fully lifted all precautionary airspace restrictions on 2 nd May, while Dubai Airports (DWC and DXB) removed the one-flight-per-day cap on foreign airline carriers. Emirates resumed operations across 96% of its global network, with Etihad and flydubai implementing comparable expansions. Flight operations at Dubai International (DXB) and Abu Dhabi International (AUH) airports were briefly suspended or diverted on 4 th May following Iranian projectile activity; however, normal operations resumed within 24 hours. Flight schedules remain subject to short-notice disruption.
O2	LEBANON	HEALTHCARE SYSTEM	DETERIORATING	CRITICAL	Lebanon's healthcare system has reportedly effectively collapsed in south Lebanon and is under severe strain countrywide. According to the Ministry of Public Health, as of mid-April six hospitals across the country have ceased operations. Medical facilities and vehicles reportedly continue to be targeted by Israeli strikes. Healthcare facility access continues to deteriorate amid sustained Israeli military operations and the healthcare system's limited capacity to currently operate.
O3	LEBANON	BUSINESS OPS & COMMERCE	DETERIORATING	CRITICAL	The ceasefire in effect since 17 th April continues to hold, despite ongoing hostilities between Hezbollah and Israel and the IDF's continued presence in southern Lebanon. Beirut-Rafic Hariri International Airport (BEY) remains operational; however, most international carriers continue to suspend flights or operate with significantly reduced schedules. Lebanon's banking sector also remains under severe strain.
O4	IRAN	ALL OPERATIONAL RISKS	DETERIORATING	CRITICAL	Iran's operating environment remains critically strained, with the conflict exacerbating pre-existing operational constraints. The ongoing US naval blockade of Iranian ports since 13 th April further drives the trend. The succession process for the new Supreme

					Leader remains unresolved, contributing to fragmentation within and across security and governance institutions. Most international airlines continue to avoid Iranian airspace. Persistent sanctions, currency devaluation, and extensive damage to critical infrastructure underscore the critical rating.
O5	GULF	SUPPLY CHAIN RELIABILITY	STABLE	SIGNIFICANT	Transit through the Strait of Hormuz remains significantly constrained relative to pre-conflict levels, as Iran retains capabilities to target commercial shipping and critical infrastructure across the Persian Gulf and Gulf of Oman. Reportedly about 70% of GCC food imports typically transit the strait. GCC strategic food reserves generally cover around six months and have not yet been depleted. As a result, supermarket-level shortages remain limited and actively managed, with mitigation measures including Kuwait's ban on food re-exports on 1 st March.
O6	SAUDI ARABIA	AIRPORTS & AIR OPERATIONS	IMPROVING	SOME	Saudi airspace remained open throughout the conflict period and continues to serve as the primary southern air corridor for east-west air traffic. Based on open-source flight-tracking data, King Abdulaziz International Airport (JED) has experienced the least disruption among major Gulf hubs and is increasingly used as an alternative routing point. Airports across Saudi Arabia remain operational, with capacity expanding. The overall risk rating remains 'some', reflecting elevated risk exposure during the Islamic Hajj period and the likely increase in demand.

Terminology

Attack Volume Scale			
<p>Minimal</p> <p>Very limited scale of drone and/or missile strikes targeting the country, with any impacts highly localised.</p>	<p>Moderate</p> <p>Low to moderate scale of missile and/or drone attacks, targeting only one city/region or multiple regions in small quantities.</p>	<p>Significant</p> <p>Large number of drones and/or missiles target the country during attacks affecting multiple cities/regions.</p>	<p>Major</p> <p>Very high numbers of drones and/or missiles target the country during attacks, affecting multiple cities/regions.</p>
Attack Frequency			
<p>Minimal</p> <p>No missile or drone strikes have been reported on the country's territory within the past 72 hours.</p>	<p>Intermittent</p> <p>Drone and missile strikes are launched occasionally (eg: every 2-3 days).</p>	<p>Daily</p> <p>Drone/missile strikes of varying scale are launched towards the country on a daily basis.</p>	<p>Constant</p> <p>Multiple waves of drone and missile attacks are launched on a day-to-day basis.</p>
Targeting			
<p>Incidental</p> <p>Little to no evidence of drones and/or missiles being launched towards urban centres with any minor impacts incidental in nature.</p>	<p>Military</p> <p>Drone and/or missile strikes are predominantly targeting military sites largely away from populated areas.</p>	<p>Infrastructure/govt</p> <p>Drone/missile strikes are predominantly targeting infrastructure, government buildings and/or embassies with some wider impact.</p>	<p>Urban centres</p> <p>Drone and/or missile strikes are exploding without interception in major urban centres directly impacting populated areas.</p>
Interception rates			
<p>Extensive</p> <p>Country's air defences are intercepting the vast majority of projectiles. Explosions reported are mainly the result of intercepted drone/missile debris</p>	<p>Moderate</p> <p>Country's air defences are intercepting most projectiles, although sporadic impacts as the result of direct hits are reported.</p>	<p>Limited</p> <p>An approximately even split between projectiles intercepted and direct hits.</p>	<p>Extremely limited</p> <p>Next to no projectiles are intercepted by the country's air defences, resulting in widespread strikes and critical impacts.</p>
Rhetoric			
<p>Conciliatory</p> <p>Rhetoric towards the country from state(s) or state affiliated actor(s) has shown clear conciliatory tone and/or preference for de-escalation.</p>	<p>Stable</p> <p>Rhetoric towards the country from state(s) or state affiliated actor(s) has shown no sign of significant change.</p>	<p>Hostile</p> <p>State(s) or state affiliated actor(s) rhetoric towards that country is unfriendly/continually hostile, although lacks specificity or has not outlined explicit plans for strikes/violence.</p>	<p>Expressed</p> <p>State(s) or state affiliated actor(s) have explicitly expressed intent to conduct strikes and/or acts of political violence against that country.</p>
Operational			
<p>Normal</p> <p>Operations are functioning as expected with no notable interruptions; continue standard operations and routine monitoring.</p>	<p>Some Disruption</p> <p>Minor interruptions are affecting limited parts of operations; closely monitor the situation and adjust operations as needed.</p>	<p>Significant Disruption</p> <p>Major challenges are affecting multiple aspects of operations; implement contingency plans and allocate the necessary resources to mitigate impact.</p>	<p>Critical Failure</p> <p>Severe disruption has resulted in widespread or complete operational failure; implement emergency response procedures.</p>

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GSOC@healix.com
www.healix.com



Contact Us
enquiries@healix.com
+44 (0)20 8481 7720
healix.com

Head Office
Healix International
Healix House, Esher Green
Esher, Surrey, KT10 8AB
United Kingdom

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