

Iran - Ongoing Conflict With US, Israel

Conflict Continues With Strikes on Key Oil, Desalination Infrastructure Across Region as Iran Signals Political Continuity

Updated at 03:57 PM GMT, Mar 09, 2026

Key Takeaways

- **Joint US and Israeli strikes against Iran continued into a tenth day while Iranian missile and drone attacks targeted sites across the region, with Tehran vowing to continue attacks on US assets and allies.**
- **Mojtaba Khamenei was named successor to Iran's slain supreme leader, signaling political continuity for the regime.**
- **Reports suggest the US and Israel may be preparing limited ground operations to seize Iran's enriched uranium stockpile.**
- **Governments and companies are evacuating personnel and suspending operations across the region as ongoing strikes continue to threaten personnel and facilities.**
- **Energy infrastructure and trade have been heavily disrupted, driving oil prices above \$110 per barrel and worsening the volatility impacting global trade.**

Current Situation

Joint US–Israeli [strikes](#) on Iran and Iranian retaliatory attacks across the region continued through the weekend, with 09 March marking the tenth day of the conflict. Israeli strikes across Lebanon, meanwhile, included attacks on Iranian leadership in Beirut, where an [Israeli drone strike](#) on the Ramada Hotel in central Beirut killed four. Casualties continued to rise, with at least 1,332 people reportedly [killed in Iran](#). Two Israeli soldiers have been reported [killed in Lebanon](#), and one additional US soldier died from injuries sustained during the initial retaliatory [strikes on Saudi Arabia](#), bringing US losses to seven.

At the same time, Iran attempted to ease tensions with its Gulf neighbors through a [recorded apology](#) posted over the weekend. Despite the conciliatory tone, however, the message also announced Iran's intent to continue targeting US assets in the region, as well as countries cooperating with the ongoing military operation. Shortly after

the recording circulated, [incidents](#) were reported in countries such as Bahrain, Qatar, and the UAE. Later in the weekend, [additional strikes](#) were noted, including impacts at a Kuwaiti airport and a desalination facility in Bahrain that raised fears of a threat to the regional water supply.

Energy infrastructure is also emerging as a central target set in the conflict. Iranian strikes and counterstrikes have affected oil and refinery facilities across the Gulf, while disruptions to tanker traffic through the Strait of Hormuz continue to ripple through global energy markets. Several regional producers have warned that production could remain constrained if attacks on energy infrastructure persist, contributing to elevated oil prices and increased volatility in global markets.

[Mojtaba Khamenei](#), a son of Iran's slain supreme leader, was named as his father's successor, signaling likely political continuity. The day before the announcement, President Trump had warned in an ABC News interview that the next supreme leader "is not going to last long" without US approval. Media reports claim that both the US and Israel [could be preparing](#) for ground operations in Iran that would be narrowly focused on seizing Iran's stockpile of highly enriched uranium.

Amid the significant uncertainty and ongoing threat to personnel, assets, and other aspects of global business and diplomacy, both governments and private corporations continue to work to evacuate those in their care from the region, organizing charter flights, issuing guidance (including recommending against travel and recommending leaving the region in many cases), and suspending operations. The economic impact, especially to global energy costs, remains [severe](#).

Latest Impacts

- **Civilians, officials, and soldiers in population centers across the Middle East, especially those in countries hosting US bases, remain threatened by drone and missile strikes or falling debris.** While Iran's retaliatory attacks appear to be growing more concentrated on critical infrastructure, government, and military sites, private businesses and residences remain threatened, especially in strategic sectors such as the energy industry or shipping. Workers at strategic sites such as ports and airports may be more directly exposed, but falling debris and collateral damage in the event of a nearby strike could leave victims with little to no time to prepare. Due to these threats, the US government continues to adjust its footing across the region, with diplomats based in Saudi Arabia [reportedly](#) ordered to leave the country over security concerns.
- **The conflict is also believed to be tied to an uptick in antisemitic, anti-Israeli, and anti-American attacks at religious sites, government facilities, and other places of interest globally.** In Europe this weekend alone, a [bombing at a synagogue](#) in the Belgian city of Liège and [another explosion](#) at the US Embassy in Oslo threatened local communities. These attacks will become increasingly likely as the conflict drags on, with some observers concerned that Iran may attempt to activate " sleeper cells " of sympathizers overseas to carry out attacks on targets seen as being pro-Israel or pro-US amid the fighting.

- **Strikes targeting desalination facilities also threaten potable water supplies across the region.** Purported US strikes on desalination facilities that provide water to dozens of Iranian communities were used to justify Iranian counterstrikes on a similar facility in Bahrain, which “[caused material damage](#).” These strikes amplify the threat to civilian populations tremendously and could create humanitarian challenges such as drinking water shortages if attacks continue to target civilian critical infrastructure.
- **Despite frequent changes in regional airspace restrictions and several airlines’ attempts at restarting service, air travel remains largely halted across the region.** Major global airlines [continue to suspend](#) flights to the region with an outlook of several weeks, while some regional airlines that began to offer service amid the conflict have quickly moved to pause flights again, with many [regional airports also closed](#) to travelers amid fears of potential attacks. Still, others are beginning to offer [limited flights](#) amid the conflict, where airspace restrictions allow. The move threatens to increase the likelihood of either an accidental or deliberate in-air incident involving Iranian munitions, which would likely have a lasting impact on air travel in the region.
- **The growing number of government warnings against travel is expected to provoke duty-of-care considerations for business travelers.** Southeast Türkiye is the first part of the region to be assigned a US State Department “Level 4 – Do Not Travel” risk rating, and similar recommendations are likely to continue influencing decision-making based on company travel policies going forward. Similarly, the move to evacuate personnel from the US Embassy in Saudi Arabia and other diplomatic facilities across the region could also factor into those decisions.
- **Global energy supply chains remain severely disrupted, creating far-reaching economic impacts.** Bahrain’s state-owned energy company, Bapco Energies, declared [force majeure](#) after Iranian strikes on refinery infrastructure, part of what could become a growing trend as oil producers find themselves unable to operate amid the ongoing conflict and blockade of the Strait of Hormuz. This is sometimes the only avenue for exporting their products. The announcement followed an earlier force majeure declaration in Qatar affecting one of the region’s largest liquefied natural gas export facilities. Israeli strikes on Iranian oil facilities could also have long-term impacts on global oil markets, with China standing to be the [most severely impacted](#) as Iran’s top buyer. As a result, [oil prices](#) remained elevated at a four-year high above \$110 per barrel, while Asian stock markets trended downward amid continuing geopolitical uncertainty.
- **Demonstration activity continues to spread amid the ongoing conflict.** Anywhere from [dozens](#) to [thousands](#) of participants joined demonstrations in population centers around the world this weekend as unrest over the conflict continues to arise. Demonstrations surrounding the war remain divided into two camps—those in favor of the operation and supportive of regime change in the country, and those against the war—and have on occasion [come into conflict](#), raising the threat of disruptions to bystanders and local travel. Significant differences in affiliated organizers, social media visibility, location, and other factors can significantly influence participation, making it difficult to determine in advance how disruptive a certain action might become.

Outlook

Statements from the US and Israel continue to suggest confidence in control over the conflict, but Iran continues to inflict casualties and significant damage on government facilities, military bases, critical infrastructure, and other sites across the broader region, with the difficulty in defending against drone strikes cited as a [particular challenge](#) in fending off Iranian retaliation. This will continue to influence the conflict going forward, and if Iran's retaliation continues to have significant impacts for local civilians, could impact the US relationship with host governments or lead to the repositioning of military assets, intelligence functions, and other potential targets away from population centers. The threat that Iran may seek to activate so-called [sleeper cells](#), meanwhile, raises the risk of attacks with global reach, similar to the incidents in Liège and Oslo.

The economic fallout, meanwhile, continues to accumulate, with oil prices breaching \$110 per barrel at the time of publication and expected to rise further as additional oil fields and natural gas projects suspend operation over the threat to their personnel and facilities. While the US has announced its intent to provide safe passage to vessels attempting to transit the Strait of Hormuz, further details of that plan have not been revealed, with Iran adopting a [combative stance](#) that suggests clashes if any vessels attempt to cross the Strait. Without the reopening of the strait, the global energy supply will remain disrupted, and with Iran [claiming to be prepared](#) for up to six months of fighting at this intensity, the impact could continue to seep into other aspects of the economy, ranging from industrial output to inflation, if a truce is not reached.

Growing Threat to Global Energy, Food Security as Trump Presses for 'Unconditional Surrender'

Updated at 03:56 PM GMT, Mar 09, 2026

Current Situation

The conflict across the Middle East and neighboring regions continues to escalate, with at least 14 countries now involved or affected. Israeli and US forces carried out additional strikes on Iran, while Israel [also targeted](#) the Dahiya neighborhood of Beirut after issuing evacuation orders to more than 500,000 residents. The Israel Defense Forces (IDF) announced that a new phase of operations is underway, indicating an expected surge in strikes against Iranian and proxy group facilities, leaders, and other strategic targets, particularly in Lebanon. Government-chartered repatriation flights continue amid the [small-scale resumption](#) of select commercial flights in the region and despite concerns about ongoing missile threats.

In Iran, the leadership council [convened](#) to discuss the selection of a new Supreme Leader, though no timeline for the process has been announced and further details about [plans to commemorate](#) deceased former leader Ali Khamenei have not yet been released. Sri Lanka, meanwhile, [assumed control](#) of an Iranian naval vessel after it

requested permission to dock following the sinking of an Iranian warship off Sri Lanka. The threat to third countries continues to grow as well, with Azerbaijan [evacuating diplomatic staff](#) from Iran after being directly impacted by drone strikes, and the UK [arrested four](#) people suspected of spying on British Jewish communities on Iran's behalf.

Additional governments are weighing deeper involvement in the conflict. The United Kingdom has [not ruled out](#) joining US–Israeli strikes, while Canada has indicated it [does not intend](#) to participate in offensive operations but is considering providing defensive support to Gulf states. Ukraine will also [send specialists](#) to advise regional partners on defending against Iranian drone attacks, drawing on experience gained during its war with Russia.

Beyond the immediate military implications, the conflict is increasingly affecting global markets. Continued disruptions to shipping and energy infrastructure have strained oil markets, raising concerns about knock-on effects for inflation, food security, and broader economic stability. Qatar has [warned](#) that restoring normal production levels could take months if attacks on energy infrastructure continue.

Latest Impacts

- **Governments around the world continue to adjust their posture in the region, arranging chartered repatriation flights and closing embassies.** The US has [shuttered](#) embassies in Saudia Arabia, Lebanon, and [Kuwait](#). These changes, often occurring with little advance notice or in response to local emergency situations, could impact duty-of-care practices, evacuation plans, and other corporate policies, as well as triggering potential insurance liabilities for travelers and businesses alike.
- **Regional airspace closures and the widening impacts of the conflict are [pushing air traffic](#) between Europe and Asia northward.** While this will not directly increase competition for seats on these routes, the increase in air traffic could complicate routes for aircraft typically operating in the region, while the change to existing routes to divert around the conflict will increase flight times and fuel consumption, likely increasing costs and forcing timetable adjustments across the sector.
- **Global demonstration activity against the conflict continues to grow, with Saturday, 07 March on track to be a major day of action in both Europe and the United States.** In the US, particularly noteworthy demonstrations will be held at the Israeli Consulate in Atlanta at 2:00 pm; the Embarcadero Plaza in San Francisco at 2:00 pm; and the White House in Washington, DC at 3:00 pm (all times local). Demonstration activity in response to the war will continue into Sunday and beyond. Many of Europe's most noteworthy demonstrations will be held in the United Kingdom, with marches planned to the US Consulate in Edinburgh at 1:00 pm and US Embassy in London at 12:00 pm.
- **The conflict's impact on global energy prices is rising fast following reports that Gulf states could pause production amid the threat of Iranian strikes.** Qatari Energy Minister Saad al-Kaabi [warned](#) in an interview with the Financial Times that oil prices could rise as high as \$150 per barrel within weeks if trade across the Strait of Hormuz is not restored. He added that, even if the conflict were to stop today, output could

take months to recover due to the number of projects already impacted.

Outlook

With US President Trump declaring on social media that the conflict will only end with the Iranian regime's "unconditional surrender," the fighting is expected to continue through at least the near term at its current intensity. Distant, unpredictable security impacts resulting from missile or drone strikes, most likely originating with the IRGC or Iranian proxy groups but also potentially including falling debris or misfire from allied munitions, will continue until Iran's capabilities are fully degraded, forcing many potential target countries to adopt elevated public safety postures.

In the longer term, a protracted conflict threatens significant consequences for global economic, energy, and food security due to disruptions to global flows of oil and [fertilizer](#). These pains will likely become increasingly acute, as exemplified by Qatar's warning of a potential production freeze due to the conflict. Meanwhile, distant security impacts are expected to continue squeezing air travel into increasingly heavily trafficked corridors, impacting flight paths between Europe and Asia as yesterday's strikes in Azerbaijan pushed those flight paths [further north](#).

Demonstrations Over Iran Conflict Planned Across Europe, US This Weekend

Updated at 04:15 PM GMT, Mar 06, 2026

Summary

Ongoing joint US-Israeli strikes on Iran and their increasingly regional impact have led to a surge in calls for demonstrations in population centers across the United States and Europe. In addition to protests occurring with little or no advance warning, established national organizers including the Democratic Socialists of America, Party for Socialism & Liberation, and the Sunrise movement have held several well-attended days of action in the US under banner phrases including "Stop the War on Iran" and "Hands Off Iran."

On Saturday, 07 March, both organizations have called for demonstrations to be held at various government facilities, places of business, and other points of interest across the country. Particularly noteworthy calls to action related to these campaigns include demonstrations at the Israeli Consulate in Atlanta, Georgia at 2:00 pm, the Embarcadero Plaza in San Francisco, California at 2:00 pm, and the White House in Washington, DC at

3:00 pm (all in local times). Demonstration activity in response to the war will continue into Sunday and beyond.

At the same time, organizers are issuing similar calls to action across Europe on 07 March. Many of these have been announced in cities across the United Kingdom, with a series of demonstrations planned at noteworthy sites including marches to the US Consulates in Edinburgh, Scotland at 1:00 pm and London, England at 12:00 pm, as well as a march from 10 Downing St to the Consulate of Iran in London at 1:00 pm. These events are likely to attract significant security deployments and disrupt local traffic, with turnout expected to be robust. Further demonstrations are scheduled across Europe through the remainder of the weekend.

Outlook

With both sides of the conflict appearing to be preparing for a longer engagement, both ad hoc and planned protests, either against the US and Israel or against Iran, will likely continue at popular demonstration sites in the near term. This activity is expected to remain most frequent in the US and European countries, though demonstration activity in Israel, Gulf states (where US diplomatic facilities have faced unrest and a growing number of civilians are impacted amid the conflict), and other countries that have been impacted by the widening fallout of the conflict, such as Azerbaijan or Cyprus, could also rise. As the conflict impacts a growing number of countries and is causing significant consequences for the global economy, demonstration activity in countries with no direct ties to the conflict is also expected to rise.

US Signals Deeper Strikes in Iran as Israel Orders Mass Evacuations in Lebanon and Conflict Reaches Caucasus

Updated at 02:01 AM GMT, Mar 06, 2026

Current Situation

The [bombing of Tehran intensified](#) on 05 March as [Iran and Israel exchanged](#) missile strikes, which also forced millions across Israel to seek refuge in bomb shelters. Israel also conducted a drone strike in Beirut in which a [Hamas official was killed](#), and has since issued unprecedented evacuation orders covering much of Hezbollah's stronghold neighborhoods of southern Beirut and [other](#) southern parts of the country. Hezbollah has reportedly [deployed fighters](#) to southern Lebanon, potentially signaling ground conflict on a new front.

The conflict continues to spill into additional neighboring countries. Qatar's air defenses intercepted a missile attack on 05 March, and six people were reportedly injured in Abu Dhabi by falling debris from a missile interception. Iran announced strikes targeting [Kurdish groups](#) in Iraq amid reports that they are arming up to prepare for ground operations in Iran, but separately [denied launching](#) the missile that was intercepted by NATO air defenses near Turkish airspace a day earlier. Evacuation and repatriation efforts remain underway across the region, with governments chartering flights to repatriate thousands of citizens in the last few days alone.

That and other incidents, such as the interception of a drone believed to be targeting a British airbase in Cyprus, is leading to a continued buildup of European defense support in the Mediterranean, with [Italy](#) now joining Britain, France, and Greece in launching supply and patrol operations across the region. Flights were suspended at [Nakhchivan Airport](#) in the Azerbaijani exclave after drones, believed to have originated from Iran, struck the terminal building injuring at least two people. Another drone reportedly fell near a village school, marking the first security impacts reported in the Caucasus region due to the conflict, and caused Azerbaijan to [close airspace](#) near Iran amid vows for retaliation.

Maritime tensions also remain high. [At least 80 people](#) were killed after a US submarine strike on an Iranian naval vessel off the coast of Sri Lanka on Wednesday, prompting Iran to vow to retaliate "[anywhere](#)" and raising further concern for global shipping interests with US or Israeli ties. Meanwhile, transit through the Strait of Hormuz remains [heavily disrupted](#) as plans emerge for potential [U.S. naval escorts](#) for commercial shipping. Iranian media reported that an IRGC missile [struck a U.S. tanker](#) in the northern Persian Gulf on 05 March, though the US has yet to confirm this at the time of publication. The continued threat to maritime traffic, combined with widening strikes on energy infrastructure, has sustained upward pressure on oil and gas prices.

US political developments also indicate that the air campaign is likely to continue in the near term. Republican senators [voted against](#) halting the operation without congressional approval, effectively allowing the strikes to proceed despite growing debate in Washington over the scope of US involvement and the absence of a clearly articulated post-conflict plan.

Latest Impacts

- **Air travel disruptions and [evacuation efforts continue](#) across the Middle East.** Multiple charter flights have been scheduled by governments [seeking to repatriate](#) thousands of citizens from the region, while others, such as [South Korea](#), announce bans on travel to Iran. The competition for the comparatively few safe opportunities to leave the region is further complicating these efforts, and [anecdotal reports](#) of private evacuations costing as much as \$250,000 suggest that access to private transportation out of many Gulf states will be limited. The disruptions could have a lasting [impact](#) on airlines based in the Middle East.
- **Across the region and in increasingly distant countries, security preparations are intensifying and increasingly disruptive to daily life.** Millions of Israelis were forced to shelter amid the latest Iranian strikes,

and targeted attacks, stray munitions, and falling debris continue to threaten communities across the Middle East. The threat has impacted a widening area with the apparent targeting of countries including Azerbaijan, Cyprus, and Turkey, forcing countries far from the conflict, such as Italy, to [reconsider](#) their defense and public security postures.

- **Iran's plan "[to fight Americans wherever they are](#)" is likely to further disrupt global shipping and could begin to weigh on inflation.** The rising energy costs associated with disruptions to oil and gas [production](#) and export from the region, driven largely by Iranian threats effectively closing the Strait of Hormuz, threaten to [worsen global inflation](#) if the conflict continues at its current intensity. Meanwhile, the impact to other maritime supply chains, in addition to rising insurance costs and voyage times stemming from the threat to target American interests, could have equally far-reaching impacts across most economic sectors, increasing pressure on the stock market and posing a [growing threat to finance](#).

Outlook

The conflict appears likely to widen further. The United States has announced plans to expand its targeting [deeper inland](#) amid a perceived degradation in Iranian capabilities, while Iran's defense forces, organized under the Islamic Revolutionary Guard Corps (IRGC), are taking on a more [prominent role](#) following the killing of several senior state officials. The longer-term impacts to the region, including potential [food security implications](#) if shipping continues to be disrupted and panic-buying ensues, could also be significant. One potential silver lining, meanwhile, could grow out of the [lack of political support](#) for Hezbollah's likely mismatched reengagement with Israel, which [could both contribute](#) to the group's weakening.

Despite the US assessment that an observed decrease in Iran's rate of retaliation points to the extensive damage done by Israeli and US strikes to-date, observers warn that Iran could be capable of disrupting traffic through the Strait of Hormuz "[for months](#)." Others also noted that a [meeting](#) of defense industry leaders at the White House to boost munitions production and [purported discussions](#) about invoking the Defense Production Act to that end raise their own questions about the US ability to maintain momentum.

Amid the threat that Iran might expand its attacks to additional targets, described as "American" but potentially to include Israeli or other perceived NATO-aligned countries and business interests, a growing number of governments potentially at-risk are becoming increasingly involved in the conflict abroad and bolstering their preparations at home. Visible public security deployments are likely to continue to increase in population centers across Europe, the United States, and other countries where this kind of posture is atypical. This could lead to friction with local communities amid pushback against the operations in Iran, the militarization of law enforcement in the US, and other issues driving demonstration activity.

Regional Consequences Worsen as US Considers Escorting Ships Through Strait of Hormuz

Updated at 04:32 PM GMT, Mar 05, 2026

Current Situation

Israel expanded its operations on 04 March with [strikes](#) targeting Iranian government facilities, including the presidential palace in Tehran, as Iranian officials claim the death toll in the country has exceeded 1,000. Preparations began for the funeral of Supreme Leader Ayatollah Ali Khamenei, with three days of national commemoration expected. The funeral was expected to take place in Khamenei's home town of Mashhad following a late evening ceremony at Tehran's Imam Khomeini ■Prayer Hall on 04 March, but this has since been [postponed](#) to a yet-undisclosed date.

Iran's Assembly of Experts will likely appoint a successor soon, with Mojtaba Khamenei, son of the former Ayatollah, widely seen as a leading candidate. Israel's defense minister has [warned](#) that any successor would be targeted. Israel also continues to target both Hezbollah and Iranian personnel in Lebanon and has warned residents south of the Litani River to evacuate to the north as ground and air activity [intensifies](#). Hezbollah, meanwhile, began retaliating against Israeli targets, with noteworthy attacks including a [drone strike](#) that targeted the offices of an Israeli defense firm.

Irani officials [continue to reject](#) any potential peace talks, with the military launching at least [40 missiles](#) at Israeli and US targets overnight. One, assessed to be heading toward Turkish airspace, was [intercepted](#) and neutralized by NATO air and missile defense elements in the Eastern Mediterranean. Fragments from the intercept fell in the Dörtyol district of Hatay province, though no casualties were reported. Cypriot airspace was also briefly closed near Larnaca Wednesday morning as a suspicious object was observed off the coast, near Lebanon. The widening threat continues to [disrupt air travel](#) across the entire region.

In response to Iran's reiteration that the Strait of Hormuz is under its control, US President Trump suggested that the US Navy [could escort](#) commercial vessels in the region to stabilize energy markets. US Defense Secretary Pete Hegseth confirmed that the United States used a submarine-launched torpedo to sink an Iranian warship in the Indian Ocean, marking the first time an American submarine has fired a torpedo against an enemy vessel in combat since World War II. The incident signals a further geographic expansion of the conflict beyond the Persian Gulf and raises concerns about risks to vessels operating in more distant maritime corridors. [Oil and gas prices](#) remain elevated amid the continued threat to global supply. Stocks also remain volatile amid the uncertainty, with several Asian indices opening [sharply lower](#) and trading temporarily suspended in Seoul amid significant losses. UK and US markets, however, appear to be [stabilizing](#).

Latest Impacts

- **Air operations across the Middle East remain heavily disrupted.** While limited commercial flights from the UAE [resumed](#) on 04 March, many regional carriers have suspended service until at least 05 March. Governments, including the US, continue arranging flights to [evacuate expatriates](#) from countries across the Middle East. Temporary airspace closures as far from the conflict as Cyprus reflect the ongoing volatility.
- **US consular services are increasingly disrupted by threats to regional diplomatic facilities.** Both Iranian strikes targeting embassies and consulates across the region (which have forced the closure of [at least three](#) embassies to-date) and [demonstration activity](#) in places like Iraq and even further abroad, such as Pakistan, continue to threaten US diplomatic personnel and disrupt important services, potentially including state assistance with evacuation.
- **The widening impacts of Iran's retaliation are pulling a growing slate of countries into the conflict.** Following the attempted Iranian drone strike on a British air base in Cyprus and the later downing of a missile believed to be destined for the island nation, British, French, and Greek forces are [increasing their air defenses](#) at the Royal Air Force Akrotiri facility. France is also [deploying](#) the aircraft carrier Charles de Gaulle to the Mediterranean to help bolster security along globally significant shipping lanes.
- **Political tensions between the United States and European partners are also intensifying.** The rising threat to European assets and citizens, both in the Middle East and abroad, are straining important political relationships with European leaders and the Trump administration. President Trump [threatened](#) trade retaliation against Spain after Prime Minister Pedro Sánchez refused US use of joint bases for strikes on Iran, reiterating Spain's opposition to the conflict. The European Union [signaled](#) potential countermeasures should existing trade arrangements be affected.

Outlook

The expanding geographic scope of the conflict and Israel's widening operations in Lebanon increase the likelihood that additional governments could become directly involved, raising risks to both military and civilian populations. As retaliatory strikes reach new countries and strategic facilities, the threshold for broader regional participation continues to lower.

Market volatility, airspace disruptions, and threats to global energy flows are expected to persist in the near term. Continued instability in the Strait of Hormuz and the Eastern Mediterranean, combined with ongoing aviation disruptions, will likely sustain pressure on oil and gas prices as well as global transportation networks. At the same time, political friction between the United States and European partners may complicate coordination if the conflict becomes prolonged.

Several factors will shape the trajectory of escalation. The leadership transition process following Khamenei's death, Hezbollah's level of sustained engagement, and the effectiveness of Iranian strikes on high-profile regional targets will influence whether additional foreign militaries intervene. A further key variable is Iran's capacity to maintain its current tempo of missile and drone launches. While some defense officials have pointed to a declining rate of fire as a possible indication of [strain on supplies](#), the true state of Iran's arsenal remains [uncertain](#), limiting confidence in projections of how long the current pace can be sustained.

Regional Impacts Increasingly Significant as Iran Strikes Growing Variety of Targets Across Middle East

Updated at 04:33 PM GMT, Mar 04, 2026

Current Situation

Iran's retaliation has grown further in scope, with strikes impacting civilian infrastructure and residential areas [across the Middle East](#). A [drone strike](#) on the US Embassy in Riyadh makes [nine countries](#) impacted by retaliatory strikes to date (in addition to an attempted attack on Cyprus), underscoring the widening geographic reach of the conflict. Civilian deaths are being [reported](#) in countries across the Middle East amid the strikes.

Within Iran, at least 787 people have been [reported killed](#) amid ongoing Israeli and US strikes. The International Atomic Energy Agency [confirmed](#) that the Natanz nuclear site sustained damage but does not anticipate any resulting radiological threat. Iran has [reiterated warnings](#) that it will fire on vessels attempting to transit the Strait of Hormuz, contributing to additional increases in shipping costs and oil futures, alongside broader stock market declines.

With US President Trump [warning](#) that the operation could last "four to five" weeks or longer and Israel launching [air strikes](#) and [ground operations](#) in Lebanon in response to Hezbollah's entry into the conflict, the consequences are expected to impact a widening cross-section of people living in a still-growing list of countries increasingly distant from the conflict in Iran. The threat is raising concern among regional countries that US defenses may not be capable of protecting their civilian populations.

Meanwhile, strikes targeting Amazon Web Services infrastructure in Bahrain and the United Arab Emirates [disrupted internet access](#) across the region, raising concerns about further impacts should additional communications infrastructure come under attack. Amazon warned that the extent of the damage could prolong service disruptions.

Latest Impacts

- **The United States updated its guidance on 02 March to [advise against](#) travel to fourteen countries across the broader Middle East, and recommends travelers leave as soon as possible.** The warning covers Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, the Palestinian Territories, Oman, Qatar, Saudi Arabia, Syria, the United Arab Emirates, and Yemen. The US government is also adjusting its posture, ordering or authorizing the departure of family members, non-emergency personnel, and US hires from diplomatic facilities across the Middle East. Some of these orders extend into early April, and could impact access to diplomatic services at those sites for an extended period. Remaining embassy staff at various locations including the aforementioned Riyadh site and Jordan, Lebanon, and Oman have been periodically ordered to evacuate in the event of security threats.
- **Air travel continues to face significant disruptions across the region, with both airspace closures and flight cancellations contributing to challenges for travelers seeking to leave impacted countries.** A growing number of regional governments are adopting [airspace closures](#) as a security precaution amid the frequent drone and missile barrages, many of which are overflights launched by Iran and Israel at each other. The trend not only impacts travel to the region, but also across it, both disrupting global flight paths and increasing traffic in typically less busy airspace. The repeated Iranian strikes [targeting regional airports](#) and the broader threat stemming from the conflict has also led to thousands of flight cancellations initiated by the carriers themselves, though some regional airlines have resumed [select flights](#).
- **Iranian strikes on critical communications and energy infrastructure have disrupted key services and business activity across the region.** Financial services firms in particular were impacted by the [AWS outage](#), with repairs expected to take at least a day, highlighting the potential knock-on impacts to regional businesses not harmed directly by Iranian strikes. More extensive damage could cause even longer outages, with similar impacts possible for other critical services as well. Meanwhile, activity at many gas and oil sites across the region has slowed to a halt out of an [abundance of caution](#) following Iranian strikes on a Saudi oil field, disrupting business activity in the region's flagship energy sector.
- **The intensifying conflict, the threat to the oil industry, and Iran's [closure of the Strait of Hormuz](#) are contributing to rising oil prices and shipping rates, as well as falling stocks and bonds.** Rates for tankers shipping oil from the Middle East reached [new highs](#) on fears that Iran could attack ships attempting to cross the vital waterway, driving up oil and natural gas costs in turn, and shipping rates more broadly due to knock-on impacts to insurance rates, port congestion, and other factors. The surging energy costs and overarching market instability are contributing to what economists describe as [panic selling](#), driving stocks down, with one observer noting that "The market was complacent about the scale of this war [before the weekend]."
- **Demonstration activity continues to spread globally, attracting strong turnout at both Iran solidarity and anti-regime protests.** These have targeted US businesses and diplomatic facilities, with demonstrations in Iraq and Pakistan [growing violent](#). Demonstrations announced in advance by established organizers with strong social media followings have the potential to attract [tens of thousands of attendees](#), causing significant

disruptions to the local community. This coming weekend, [ANSWER Coalition](#) is calling for demonstrators across the US opposing the conflict on Saturday, 07 March.

Outlook

There are concerns among US allies in the region, especially those hosting military bases, around whether the US can reliably guarantee the safety of their citizens amid reports that the US [could run low on munitions](#) in as little as 10 more days of conflict at the current pace. In light of Iran's "[almost limitless](#)" arsenal of drones, it could be difficult for the US and Israel to adequately fend off Iranian drone and missile strikes. Repositioning more of those resources to the region, meanwhile, [could threaten](#) the US defense posture in other tense regions, such as the Pacific.

The expanding threat environment is increasingly straining relations between the United States and its allies. Both direct risks to Gulf states and indirect spillover effects further abroad are becoming sources of friction. While Gulf countries possess the capacity to enter the conflict in their own defense, doing so would align them openly with Israel against a regional neighbor, a move that could carry domestic political consequences. Beyond the immediate region, concerns over escalation are prompting tensions with traditionally close partners.

Meanwhile, concerns about the broader threat posed to US allies outside the region are driving political spats with more traditionally close US allies, such as the [United Kingdom](#), whose air base was targeted in the attempted Cyprus attack, and [Spain](#), which has joined the UK in refusing to allow the US to launch missions from its territory. On 02 March, British Prime Minister Keir Starmer [articulated strong opposition](#) to the initial joint Israeli and US strikes on Iran, implying that they may have been unlawful, while also supporting the UK's decision to allow the US to use UK airbases to strike Iranian launch sites.

The friction highlights possible challenges in marshalling European support for any US-influenced, post-Khamenei government.

Iran Strikes Regional Energy, Trade, and Travel Infrastructure as US Suffers First Casualties

Updated at 04:56 PM GMT, Mar 03, 2026

Current Situation

Joint US-Israeli [strikes on Iran](#) continued into 02 March, targeting [over 1,000](#) military and political installations across the country, [including](#) the Natanz nuclear site. United States President Trump [claimed](#) that at least 48 Iranian military and political figures had been eliminated in the strikes to date, considering the operation “ahead of schedule” and touting other successes including the destruction of Iran’s naval headquarters and at least 9 warships. The Iranian Red Crescent [claims](#) that at least 555 people had been killed in the country, with some 100,000 aid workers deployed nationwide to support communities in need. [Iran’s retaliation](#) has also grown in scope and scale, with strikes reaching increasingly distant and [diverse targets](#), including critical regional energy infrastructure.

Iran’s strikes also broke new ground on 02 March with the interception of [two drones](#) believed to be targeting a British air base in Cyprus, indicating an increasingly direct threat to Europe. The growing involvement of Iranian [proxy groups](#)—especially Lebanon’s [Hezbollah](#)—also raises the threat to Israel and other countries further from the Middle East that could be targeted for being perceived as playing a role in the conflict. Amid the continued clashes, the US [announced](#) its first casualties following the loss of three servicemembers and serious wounding of at least five others attributed to an attack on a base in Kuwait. Another servicemember has since [succumbed](#) to their injuries. The US also announced the [loss of three warplanes](#) in a friendly fire incident, also in Kuwait; no related injuries were reported.

The expanding scope of strikes and maritime activity is already affecting global markets and trade flows. Orders from Iran’s Islamic Revolutionary Guard Corps directing vessels to divert from the Strait of Hormuz, attacks on energy infrastructure including a strike on Saudi facilities at Ras Tanura, and an attack on a commercial tanker off the coast of Oman have contributed to volatility in global oil and gas markets. Shipping traffic through key waterways has slowed amid heightened risk conditions, and a growing number of vessels remain stranded or rerouted due to safety concerns. Air travel across the Middle East has also been significantly disrupted. Strikes targeting regional hubs, precautionary airspace closures, and widespread flight cancellations have affected thousands of passengers and limited outbound travel options for foreign nationals. Airports in Bahrain, Kuwait, and the United Arab Emirates have been struck, while multiple governments have issued heightened travel advisories, further complicating regional mobility.

The conflict is also driving a surge in global demonstration activity, much of which is concentrated in the United States and Europe. However, a growing number of demonstrations have been announced near US diplomatic and military facilities in Asia and the Middle East. This is especially true of [Pakistan](#), where unrest has spread nationwide and left dozens dead. While President Trump has [claimed](#) that Iran is seeking peace talks, Ali Larjani, secretary of Iran’s Supreme National Security Council, has [refuted](#) this. The divergence in official statements underscores the difficulty of assessing intent amid Iran’s communications blackout and the competing narratives advanced by both governments during active conflict.

Latest Impacts

- **There has been widespread damage to administrative facilities, critical infrastructure, and defense installations across Iran.** More than 1,000 US and Israeli strikes have been reported across Iran since the conflict began, with most of those reported since 01 March [targeting Tehran](#). Iran said that one strike targeted the [Natanz nuclear facility](#), raising fears of a potential contamination threat, but the [International Atomic Energy Agency](#) said “We haven’t seen major military activity targeting the nuclear facilities.”
- **Many Iranian military and political leaders are believed to have been killed by Israeli or US strikes.** Iran’s political future remains unclear following the elimination of key Iranian leadership, [including](#) Ayatollah Ali Khamenei, IRGC Commander Mohammad Pakpour, Defense Minister Aziz Nasirzadeh, and dozens of others. The replacement of the Supreme Leader will be the most important indicator of the future path the regime will take, with the new ruler’s positions likely to define the country’s politics for as long as he is in power. The CIA had previously [assessed](#) that any replacement of the Ayatollah could lead to the installation of an even more adversarial leader. With the country currently under the leadership of a temporary administrative council, it is unclear how the US might engage Iran to negotiate a peace agreement.
- **The US reported its first casualties and significant materiel losses of the conflict, occurring during separate incidents in Kuwait.** At least four service members were killed and four others seriously wounded in what unnamed sources have described as a 01 March [strike on a US base](#) in Kuwait, though the military has yet to confirm this. At least three US F-15E Strike Eagle fighter aircraft also [went down in Kuwait](#) following an apparent [friendly fire incident](#), with [CENTCOM](#) reporting that all six crew members involved safely ejected. The nature of these incidents suggests that the risk to US personnel stationed further from Iran is not necessarily diminished.
- **Iran’s retaliatory strikes are reaching increasingly distant targets and impacting critical civilian infrastructure, including energy sites.** Strikes [targeting ports](#) and airports, residential and commercial buildings, and even [oil facilities](#) pose a growing threat to Gulf states and others across the broader region. This threatens increasingly distant parties, with the targeting of a UK air base in Cyprus only raising those concerns. The involvement of proxy groups including [Hezbollah](#) and Iraq’s [Saraya Awliya al-Dam](#) further increases the threat to countries further from Iran that are seen as playing a role in the conflict, though some of these groups have been severely weakened by their own conflicts with Israel.
- **The IRGC’s orders for ships to divert from the Strait of Hormuz and widening strikes on energy infrastructure are influencing oil prices and investments.** The oil tanker Skylight was [attacked](#) off the coast of Oman on 01 March, injuring several crew members and highlighting the threat to local shipping traffic. The conflict has left at least two maritime workers dead, and around 150 ships are believed to be [stranded](#) as a result of the dangerous operating conditions. This, in addition to a strike on Saudi oil infrastructure at [Ras Tanura](#) that is driving concerns about the threat to the region’s many energy sites, is leading to significant volatility and [price surges](#) in global energy markets, with oil up as much as 10% and natural gas by up to 50% at the time of writing.
- **The ongoing conflict has had a particularly significant impact on air travel, with strikes targeting major regional hubs, air space closures, and precautionary cancellations driving significant disruptions.** More than 3,400 flights across the Middle East were [canceled on 01 March](#) due to the widespread disruptions, which

threaten to prevent many foreign nationals from leaving impacted countries. Strikes have thus far hit airports in Bahrain, Kuwait, and the United Arab Emirates, and [airspace closures](#) of various duration have since been announced over Bahrain, Jordan, Kuwait, Iraq, Israel, Qatar, and the UAE. Security warnings, including “Do Not Travel” or similar alerts, have also been announced by many governments, and could further complicate travel to the region.

- **Demonstration activity, whether against the conflict or celebrating the killing of Khamenei, is especially widespread across Europe, Iran, the United States, and Pakistan.** Many demonstrations outside Iran have targeted Israeli and US government facilities, such as embassies and consulates. Businesses with ties to the war effort, or the US and Israel in general, are also likely to be targeted. Some of these demonstrations in regional countries such as Iraq and Pakistan have grown particularly violent, with clashes at the US Consulate in Karachi leaving at least 10 dead and precipitating [wider unrest](#) across the country, prompting a US [security alert](#).

Outlook

Trump has [signaled openness](#) to talks with Iran’s remaining leadership, though Iran’s top security official, Ali Larijani, [refuted](#) claims that Tehran had reached out to the US to resume negotiations, suggesting that the conflict will continue with at least the same pace and reach that has been seen to-date. While the operation achieved a series of victories early on with the suspected elimination of many important Iranian leaders, [questions are growing](#) surrounding [US defensive munitions](#) in the region and whether the US military can adequately defend regional allies—such as countries hosting US bases—from attacks. Trump has said that the US could take around [four weeks](#) to meet its objectives, and both Trump and US Defense Secretary [Pete Hegseth](#) have refused to rule out ground operations in Iran, which would dramatically raise the risk posed to US and allied personnel.

Iran’s continued targeting of critical military, travel, trade, and energy infrastructure across the Gulf region and beyond, to targets as distant as Cyprus, will place considerable pressure on Israel, the US, and their allies to undermine Tehran’s continued ability to retaliate. While it was [expected](#) that the targeting of critical energy infrastructure would be a key red line for further escalation, Gulf states and other impacted parties have been hesitant to join the conflict to-date, though this [could soon change](#).

An important factor in the direction the conflict may take going forward is the extent to which Iran’s proxies become involved, and their own capacities for harm. While Hezbollah and Hamas pose far a threat to Israel, US interests in the Mediterranean, and potentially targets as far as Europe due to their closer proximity to these sites, their [significantly weakened](#) states following earlier conflicts with Israel will likely limit the threat they pose. Still, these groups and their allies, as well as lone actors inspired by the conflict, could pose significant threats to the public in the form of terror attacks. American authorities continue to investigate [potential links](#) between the conflict and a 01 March mass shooting in Austin, Texas that killed two people and injured more than a dozen others.

Attacks Continue Across the Middle East for a Second Day as Iran Mulls Replacement for Deceased Ayatollah

Updated at 07:01 PM GMT, Mar 02, 2026

Situation

Israeli and US strikes on Iran have entered a second day, with US President Donald Trump indicating that fighting could last for several more days. Iran has continued to take retaliatory action, launching missiles and drones towards both Israel and US bases in the region. Tehran is also increasingly targeting critical civilian infrastructure in the Gulf, including several of the region's key airport hubs, which sit at the crossroads of routes connecting Europe, Asia, and Africa.

Iranian state media confirmed that Supreme Leader Ayatollah Ali Khamenei was killed during the initial round of strikes, as was his son and several other high-ranking leaders. As of this writing, his successor has not been named, with a group of senior clerics known as the [Assembly of Experts](#) due to meet Sunday to begin deliberating on the country's next leader. The running of Iran is currently in the hands of a [three-member transitional council](#), comprised of Ayatollah Alireza Arafii, member of a powerful constitutional watchdog, President Masoud Pezeshkian, and Supreme Court Chief Justice Gholam-Hossein Mohseni-Ejei. Security chief Ali Larijani and the Islamic Revolutionary Guard Corps are also expected to play pivotal roles in the council.

Impacts

- **Iran has continued to target civilian infrastructure in the Gulf region.** Falling debris from an intercepted drone in Abu Dhabi that crashed into the Etihad Towers [injured](#) a woman and her child. In Dubai, an Iranian drone that was intercepted damaged the landmark Burj Al Arab Hotel. Fairmont The Palm Hotel on Dubai's Palm Jumeirah was also [apparently](#) targeted. Minor damage was also [reported](#) at a concourse at Dubai International Airport and at the Jebel Ali Port. Oman's commercial port of Duqm was also [reportedly](#) hit by two drones. Bahrain, Saudi Arabia, Kuwait, and Qatar, in addition to Israel, have also been targeted. The attacks throughout the Gulf [threaten](#) efforts by regional leaders to present their nations as peaceful and stable locations that can serve as global business and finance hubs.
- **Iran has begun its constitutional succession process following the death of Supreme Leader Ayatollah Ali Khamenei, who died after nearly 37 years in power.** A temporary leadership council — including Iran's president, judiciary chief, and a Guardian Council appointee — is governing while the 88-member Assembly of

Experts prepares to select a new supreme leader under an opaque, clerically controlled process. Potential successors [include](#) head of the judiciary, Gholam-Hossein Mohseni-Eje'i; Ayatollah Khamenei's chief of staff, Ali Asghar Hejazi; and Hassan Khomeini, a moderate cleric from the reformist political faction who is a grandson of Ayatollah Khomeini. Khamenei had also reportedly established multiple layers of succession for other senior political and military positions. Other high-level officials confirmed killed in the strikes [include](#) Rear Adm. Ali Shamkhani, secretary of the Defense Council; and Maj. Gen. Mohammad Pakpour, commander of the Islamic Revolutionary Guard Corps.

- **The conflict has triggered [widespread airline cancellations](#) and flight disruptions across the Middle East**, with airspace closures and safety concerns forcing carriers to suspend, reroute, or cancel thousands of flights. Major hubs such as Dubai, Abu Dhabi, and Doha saw operations halted as several countries shut their airspace and Iran launched attacks on key airports, including Dubai and [Bahrain](#) international airports. Carriers like Emirates and Etihad [suspended operations](#) and international airlines curtailed Middle East routes amid ongoing conflict. The cancellations and closures are expected to have ripple effects globally, given the Middle East's critical position at the juncture of Asia, Europe, and Africa.
- **Shipping in the region also remains deeply disrupted amid the [de facto closure](#) of the Strait of Hormuz**. A US-sanctioned, Palau-flagged oil tanker was [attacked](#) off the coast of Oman, although Omani officials did not specify what hit the vessel. CMA CGM, the world's third-largest container shipping company, has [suspended](#) passage for its vessels through the Suez Canal, instead sending ships around the Cape of Good Hope. Japanese shippers have also [suspended](#) operations in the Persian Gulf.
- **The disruptions to the oil market have prompted OPEC+ to agree to an output hike**. The group has [agreed in principle](#) to a 206,000 barrel-a-day production hike for April, although the impacts of any increase are contingent on the status of the Strait of Hormuz.
- **The closure of the Strait of Hormuz will also have [implications](#) for the global gas market**. At least eleven liquefied natural gas (LNG) tankers linked to Qatar have paused voyages, Asian buyers are scrambling for alternative cargoes, and major Japanese shipping firms have ordered vessels to avoid the area, raising the risk of supply bottlenecks and potential output cuts if exports cannot flow. Asia is particularly exposed, with China and India heavily reliant on Qatari LNG, while Europe faces vulnerability due to relatively low storage levels. Analysts warn that prolonged shipping disruptions, higher Brent crude prices, and possible increased LNG demand from countries such as Egypt and Turkey could drive significant price spikes across both spot and long-term gas markets.
- **The conflict has also sparked demonstrations across the world**. Scenes of celebration were reported in [Tehran](#) following news of the death of Khamenei, while in [Pakistan](#), at least nine people were killed when attempting to storm the US Consulate in Karachi during a protest. Demonstrators also [gathered](#) across the US on Saturday to protest the strikes on Iran, including [hundreds](#) outside the White House.

Outlook

President Trump's explicitly stated goal of regime change suggests that operations in Iran will proceed for days, if not weeks. Iran is expected to continue retaliatory strikes for as long as their military capabilities allow. The expected entry of Kata'ib Hezbollah and the Houthis into the conflict, could also significantly widen the scope of the fighting, although it remains to be seen how much of a role they may seek to play. Hezbollah in Lebanon, though weakened, may also seek to attack Israel or US interests in the region. It's also unclear if Trump's exhortations that the Iranian people overthrow their government will be heeded, and the US has ruled out ground operations that might otherwise be used to force a regime change. The Iranian regime is facing a moment of existential crisis and will likely seek to use levels of violence similar to or exceeding that seen in suppressing protests in January.

Maritime Insurance, Oil Prices, Stocks Volatile After Iran Orders Ships Not to Pass Strait of Hormuz

Updated at 01:19 PM GMT, Mar 01, 2026

Current Situation

Amid a rapidly-evolving security environment punctuated by ongoing missile and drone strikes [across the Middle East](#) and [Israeli claims](#) that Iranian Supreme Leader Ali Khamenei was killed in one such incident, reports have emerged that the Islamic Revolutionary Guard Corps (IRGC) is [ordering ships](#) not to pass through the Strait of Hormuz. The warning, and the broader conflict and other signs of danger that preceded it, have led dozens of ships to seek safe harbor on either side of the Strait, creating a traffic bottleneck at local ports and disrupting trade along "[the world's most vital oil export route.](#)"

Impacts

The US Navy has since declared that it "[could not guarantee](#) the safety of shipping" near the Strait, warning against operating in the area.

- Even before the threat, [dozens of tankers](#) reportedly sought safe anchorage in regional countries or avoided the waterway altogether, disrupting trade flows.
- Oil companies, other shipping firms, and even [national agencies](#) are either advising or ordering vessels to avoid the area.

- Many [began to do so](#) before the latest strikes began, with the cumulative impact of delayed or canceled shipments from the region likely to raise energy prices.

[Insurers](#) of both vessels and cargo have already begun modifying or canceling some policies, raising rates for voyages to the region by as much as 50% in response to the heightened threat.

- Many other insurers are expected to follow suit on Monday, when the typical business week begins.
- These insurers are not expected to deny coverage to impacted vessels altogether, but rather to negotiate new contracts to cover the same vessels at higher rates.

The Strait of Hormuz carries approximately 20% of the global oil trade and [significant quantities](#) of LNG, but global markets beyond energy are also threatened by the conflict.

- The [volatility](#) could push oil prices over \$100 per barrel if the conflict lasts more than a few days, which would have an important impact on the global energy trade, potentially raising costs and disrupting supplies in virtually every sector.
- This is expected to have profound impacts on investments, especially in regional markets that open on Sunday, 01 March, giving an early look at the [potential fallout](#) for investors before western bourses open the following morning.

US, Israel Launch Attack on Iran, Prompting Retaliatory Strikes Throughout Middle East

Updated at 09:14 PM GMT, Feb 28, 2026

Summary

On Saturday, 28 February, Israel said it [launched](#) a preemptive attack against Iran, with reported explosions across multiple areas in Iran. Following Israel's announcement, US President Donald Trump said the US had begun "[major combat operations](#)" against Iran as part of Operation Epic Fury and called for the Iranian people to "take over your government" once the US had concluded operations targeting Iran's military. Explosions and smoke were seen over Tehran and other cities. Trump and Israeli officials have framed the operation as aimed at neutralizing threats to national security. Iran said it had begun a counterattack of drones and missiles towards Israel, with sirens heard in Tel Aviv. Iran also retaliated against multiple US military sites across the Middle East. The internet

is largely cut in Iran and civil communications are disrupted. Several countries including Iran, Iraq, Kuwait, Bahrain and Qatar have closed their airspace.

Impacts

- **Israeli officials have said that they are [targeting](#) the entire Iranian political and military leadership, while the US is directing its fire towards Iran's military capabilities.** There have reportedly been strikes targeting Ayatollah Ali Khamenei's residential compound in Tehran, although as of this writing it is [unclear](#) if the compound was hit and what Khamenei's [current status or whereabouts](#) are. Other strikes appear to have targeted the Presidential Palace area and other key government buildings in Tehran, such as the Ministry of Intelligence. Elsewhere in Iran, officials have reported dozens of deaths after a strike on a girls school in the southern city of Minab.
- **There is a near total internet blackout in Iran, according to internet connectivity monitor [NetBlocks](#).** The throttling of information from Iran will make it difficult to verify developments inside Iran. It also will likely make any demonstration activity more difficult to coordinate, hampering one of Trump's stated goals of the operation.
- **In addition to Iran, strikes also [targeted](#) Kata'ib Hezbollah and other Iranian-linked groups in Iraq.** Kata'ib Hezbollah has [vowed](#) to retaliate. Iraq's Kurdistan region ordered the closing of schools in the semiautonomous region until Wednesday.
- **Israeli media has [reported](#) that Yemen's Houthis plan to resume attacks on Israel and on shipping routes.** The group had paused their regular attacks on ships in the Bab El-Mandab Strait, which had disrupted global shipping, after Israel and Hamas agreed to a ceasefire in 2025.
- **Iran has launched retaliatory strikes at US bases in the region.** Bahrain [confirmed](#) a strike on the services center of the US' Fifth Fleet. The United Arab Emirates said that one person had been [killed](#) in Abu Dhabi. Kuwait, Qatar, and Jordan, all of whom host American bases, also [reported](#) intercepting missiles.
- **Saudi Arabia issued a statement [condemning](#) the "brutal Iranian aggression" and announcing its full support and capabilities for any countries targeted by Iran.** The attacks may lead to other countries in the region entering the conflict themselves, or to lift prohibitions on the US using bases within their territory to launch strikes on Iran. Conversely, Iran may hope that attacks on neighboring countries will lead them to pressure the US to halt the conflict.
- **Israeli authorities [implemented](#) emergency restrictions and [declared](#) a state of emergency.** Authorities have prohibited public gatherings, schools and non-essential workplaces are closed, and hospitals have transitioned to emergency protocols, including relocating patients to underground protected areas as a precaution against further missile or drone attacks. Israel has also closed its airspace to civilian flights, with officials [advising](#) the public not to travel to airports until further notice.

- **International airlines [suspended](#) or canceled numerous flights to and from the Middle East, prompted by widespread airspace closures and safety concerns.** Carriers grounded services to key hubs including Tel Aviv, [Dubai](#), and other regional destinations as governments shut their airspace and rerouted or turned back aircraft amid the conflict. Iraq, Kuwait, Qatar and UAE have all [closed](#) or restricted their airspace this morning. Turkish Airlines has canceled flights throughout the region, as have other carriers.
- **International reaction to the strikes on Iran combined explicit support from several Western governments with broader calls for restraint and diplomacy.** Canada and Australia openly endorsed the operation, stating they support US action to prevent Iran from obtaining a nuclear weapon and threatening international peace and security, while the United Kingdom and Germany reiterated that Iran must not develop a nuclear weapon and emphasized coordination with partners. France warned the conflict carries grave consequences for global security, urged an end to escalation, called for emergency UN Security Council talks, and pressed Iran to negotiate limits on its nuclear and ballistic missile programs. The European Union, Switzerland, and Lebanese officials stressed de-escalation, civilian protection, and adherence to international law. Omani Foreign Minister Badr Albusaidi, who had been mediating recent US–Iran talks, criticized the strikes, stating that “active and serious negotiations have yet again been undermined” and urging the United States “not to get sucked in further,” adding that “this is not your war.”
- **Activist groups in the United States have called for rapid response demonstrations this weekend to protest the strikes.** Gatherings of several hundred people are likely in several urban areas across the country this weekend. Demonstrations are also likely in Europe. Additionally, several Iranian diaspora groups had planned demonstrations for this weekend calling for the US to make greater efforts to overthrow the Iranian government. Such demonstrations are likely to see increased participation. There is a possibility of clashes and confrontations in areas where the two groups gather in close proximity to each other.

Outlook

President Trump's explicitly stated goal of regime change suggests that operations in Iran will proceed for days, if not weeks. Iran is expected to continue retaliatory strikes for as long as their military capabilities allow. The expected entry of Kata'ib Hezbollah and the Houthis into the conflict could also significantly widen the scope of the fighting, although it remains to be seen how much of a role they may seek to play. Hezbollah in Lebanon, though weakened, may also seek to attack Israel or US interests in the region. It's also unclear if Trump's exhortations that the Iranian people overthrow their government will be heeded, and the US has ruled out ground operations that might otherwise be used to force a regime change. The Iranian regime is facing a moment of existential crisis and will likely seek to use levels of violence similar to or exceeding those seen in suppressing protests in January.

Key Considerations Ahead of Potential US Military Conflict with Iran

Updated at 02:22 PM GMT, Feb 28, 2026

Current Situation

On 26 February, Admiral Brad Cooper, the top US military official in the Middle East, [briefed President Trump](#) “about the options for military action against Iran” amid the [continued deployment](#) of US military resources to the region and other signs that an attack may be imminent. Iranian officials continue to insist that strikes of any scale would trigger an open conflict and warned that nuclear talks would fail if the US does not abandon its “[excessive demands](#).” [The US](#) and [other countries](#) are allowing (or ordering) non-emergency government personnel and their families to leave Iran, Israel, and other regional countries that could be impacted in the event of a conflict.

With clashes appearing increasingly likely, the AlertMedia team is highlighting some key considerations and expert analysis below.

What are some signs that a conflict might be imminent?

- US Vice President JD Vance [believes](#) there is “no chance” that a drawn-out conflict could take place, but he acknowledged that “military strikes against Iran remain under consideration...to ensure Iran isn’t going to get a nuclear weapon.”
- The International Atomic Energy Agency (IAEA), a UN-run watchdog agency, stated that Iran had [not allowed its investigators](#) to access the various nuclear sites damaged by Israeli and US strikes in 2025, and therefore could not verify whether Iran has ceased uranium enrichment. The IAEA has [urged Iran to grant it access](#), particularly to the Isfahan facility.
- Amid [one of the most significant](#) US military deployments to the Middle East since the 2003 Iraq War, important resources (include support equipment such as [in-air refueling systems](#)) continue to be deployed to the region.
- The buildup includes an [unprecedented deployment](#) of fighter aircraft to Israel in a potential sign of growing collaboration between US and Israeli defense forces on Iran. The Gerald R Ford, the world’s largest aircraft carrier, had been [resupplying in Greece](#) until 26 February, when it embarked for Israel with an expected arrival on 27 February.
- The US government has [authorized non-emergency embassy personnel](#) to leave Israel. In a [message](#) to embassy staff, US ambassador to Israel Mike Huckabee urged that those who wished to depart do so immediately, predicting a surge in demand for air travel. The US is the latest in a growing number of

countries that have either offered or ordered personnel to leave countries in the region.

If a conflict does occur, what can be expected?

- One retired US military official [noted](#) that a ground invasion of Iran would be highly unlikely, with the US and any allied forces likely to rely instead on air superiority in a strategy similar to what was employed during the 2025 conflict.
- However, Iran could still hit back with large-scale drone and missile attacks targeting US personnel, equipment, investments, and other assets in the region. Iranian Foreign Minister Abbas Araghchi [warned again](#) Thursday that the country's response to a strike could involve the targeting of US bases in nearby countries, resulting in a wider, regional conflict.
- Even if Iran [remains weakened](#) following last year's conflict and amid widespread domestic unrest, its [regional proxies](#) continue to pose a significant threat, especially to Israel. The Israeli government continues to update its National Emergency Portal with safety guidance. While no material changes have been announced as of publication, authorities are encouraging vigilance, with religious leaders permitting the use of TVs and radios during Shabbat to facilitate monitoring.
- [Experts also expect](#) that any Iranian attack would involve a cyber threat component. Pro-regime cyberattacks could have a range of impacts "ranging from simple website defacement...to more sophisticated attacks against critical infrastructure."
- If regime change is the goal, then a lengthy engagement could be [required](#). Iran's theocratic regime, exercising total control over the country since 1979, has weathered decades of sanctions pressure, repeated attacks meant to destabilize the government or undermine its nuclear program, and continues to exert strong domestic influence.
- Any conflict would pose a significant threat to the global energy trade, in addition to various other industries in the region ranging from finance to manufacturing. [Oil prices have risen](#) in response to the continued escalations and will likely continue to do so if traders anticipate that a closure of the Strait of Hormuz or other supply chain challenges will impede oil flows or production.

Third Round of US-Iran Talks Ends Without Deal; Domestic Unrest Continues

Updated at 08:12 PM GMT, Feb 27, 2026

Current Situation

Third-round talks between US and Iranian representatives ended after two sessions on 26 February, with no substantive progress toward a deal announced. While Iranian negotiators remain confident that a deal can be reached before the 06 March deadline set by President Trump, they continue to refuse core [US demands](#) such as an end to sunset provisions for restrictions on its nuclear program and the transfer of nuclear materials out of the country. Omani mediators claimed that some progress was made, and that the two sides would meet again the following week in Vienna for more technical talks.

Simultaneously, Iran's domestic [economic challenges](#)—worsened by crippling sanctions, widening [technological disruptions](#), and other factors—continue to mount, driving further unrest. A series of [demonstrations at universities](#) in population centers across the country have grown increasingly disruptive and violent amid the broader demonstration activity coinciding with the 40-day mourning period for protesters killed during earlier unrest and other drivers. Participants in unrest in the country face significant consequences, including ongoing state monitoring and [harassment](#).

With US leaders including Vice President JD Vance and Secretary of State Marco Rubio [warning](#) that Iran is “rebuilding and expanding its ballistic missile and nuclear programs” and is “a major threat to US interests;” the slow progress at repeated rounds of talks; and further investigative reports warning that Iran has [made progress](#) toward re-arming itself; a deal that avoids at least limited strikes appears increasingly unlikely.

Outlook

Iran continues to threaten “[an all-out response](#)” to any strike, no matter how small, raising the stakes amid repeated threats to attack and President Trump's [own admission](#) that he was considering [limited operations](#). The US Military is said to be [increasingly concerned](#) about the consequences of a lasting conflict with Iran, highlighting in particular concerns about the economic fallout of even a temporary closure of the Strait of Hormuz and the likelihood that retaliatory attacks might target US bases or other sites in neighboring countries. Amid these concerns, congressional Democrats have [vowed](#) “to force votes next week on legislation to restrict President Donald Trump from attacking Iran without congressional approval,” though attempting to do so and failing [could backfire](#).

Student-led demonstration activity continues in Iran, though amid the recent refocusing on nuclear disarmament and other US objectives, the ensuing state crackdown has not recently been treated by the Trump administration with the same gravity as it [had been previously](#). Despite this, comments by Trump and other world leaders and observers [repeatedly highlight](#) the ongoing abuses endured by protesters in the country. The sudden shift to a near-singular focus on the country's nuclear program and missile stockpiles, in addition to Trump's vacillation between a purported preference for peace and repeated threats of attack, continues to [raise questions](#) about the end goal in Iran.

This is of particular concern to the military leaders, bureaucrats, and potential investors whose decision-making will be [significantly impacted](#) by the lack of a clear vision for the country's future, which they could otherwise more readily prepare for. Allies of the US, especially members of Trump's new global Board of Peace initiative, are equally likely to question Trump's commitment to the peace process amid the significant US military buildup and repeated threats. With any Iran conflict [likely to threaten](#) US goals and further destabilize the region, how Trump intends to square that potential outcome with his self-presentation as a global peacemaker remains to be seen.

Heightened Tensions Ahead of Next Round of Talks in Geneva

Updated at 12:01 AM GMT, Feb 27, 2026

Current Situation

US-Iran tensions have entered a more acute phase as negotiators prepare to meet in Geneva on Thursday for what appears to be a final effort to avoid military conflict. The upcoming talks, facilitated through Omani mediation, come amid growing indications that the Trump administration is weighing near-term military options should negotiations fail.

Media reports, citing advisers familiar with internal discussions, indicate that President Donald Trump has been leaning toward authorizing an initial, limited strike in the coming days intended to demonstrate to Iran's leadership that Washington is prepared to act if Tehran does not agree to abandon its ability to produce a nuclear weapon. While no final decision has been announced, reports suggest that targets under consideration range from the headquarters of Iran's Islamic Revolutionary Guard Corps to nuclear facilities and elements of Iran's ballistic missile program. The same reporting indicates that Trump has left open the possibility of a broader military campaign later this year aimed at weakening or toppling Supreme Leader Ayatollah Ali Khamenei should initial measures fail to achieve US objectives.

Public messaging from US officials reflects both pressure and uncertainty. Special envoy Steve Witkoff stated in a weekend interview that President Trump was "curious" why Iran had not yet capitulated in the face of Washington's expanded military build-up in the Middle East, noting that the president had already warned of a limited military strike if a deal could not be reached. Witkoff added that while Trump prefers a negotiated outcome, the administration is prepared to act if Tehran does not make meaningful concessions.

Iranian officials have signaled that diplomacy remains possible. Foreign Minister Abbas Araghchi stated that there is still an opportunity to resolve the dispute through a "win-win game," telling US media that negotiators are working on the elements of a potential agreement. However, Tehran has also maintained that it would retaliate against US

bases across the region in the event of military action, raising the prospect that even a limited strike could trigger broader escalation.

The US military posture has now expanded further. In addition to the USS Abraham Lincoln carrier strike group already operating in regional waters, the USS Gerald R. Ford carrier strike group has arrived in the region, reinforcing US capacity for sustained air and naval operations.

Within Iran, anti-government demonstrations re-emerged over the weekend at several universities, marking the first notable protests since January's deadly crackdown. While the gatherings do not appear to match the scale of pre-crackdown unrest, they highlight underlying domestic fragility and raise the possibility that external conflict could intersect with renewed internal instability.

Impacts

The convergence of last-ditch diplomacy, reported military strike planning, and expanded US force posture materially increases the likelihood of short-notice disruption across the region. Even absent immediate conflict, the elevated threat environment is already influencing evacuation considerations, maritime routing, aviation risk management, and broader operational planning.

- **The United States has [ordered](#) the departure of non-emergency personnel from its embassy in Beirut, citing escalating regional tensions.** The move signals heightened concern over potential reprisal activity by Iranian-aligned groups should military action occur and may prompt additional precautionary measures by other governments and diplomatic missions across the region.
- **Maritime traffic through the Strait of Hormuz remains particularly vulnerable.** Iranian forces have rehearsed vessel boarding procedures in recent exercises and have previously seized foreign vessels in the Persian Gulf. A US strike would increase the probability of retaliatory action against commercial shipping or energy infrastructure, with implications for insurance costs, voyage times, and global energy markets.
- **Aviation disruption risk remains elevated.** In previous escalations, airlines rerouted or suspended flights across large portions of Middle Eastern airspace. The presence of two US carrier strike groups, combined with Iranian warnings that US regional bases would be targeted in the event of conflict, heightens the likelihood that airspace restrictions or flight cancellations could occur rapidly in response to military action.
- **Inside Iran, renewed university protests signal continued domestic tension.** A conflict scenario could exacerbate economic strain, telecommunications disruptions, and public unrest, increasing operational risk for businesses and foreign nationals in-country.

Outlook

The scheduled Geneva talks represent a narrowing window for de-escalation. However, the disclosure of strike planning, the arrival of a second US carrier strike group to the region, and increasingly explicit deterrent messaging from both sides underscores the seriousness of the current moment.

In the immediate period ahead of the Geneva talks, the risk environment remains fluid and highly sensitive to political signaling and operational developments. A limited US strike intended as coercive leverage could remain contained—but it also carries a credible risk of regional retaliation, including strikes against US bases, proxy activity targeting diplomatic facilities, or disruption of maritime transit. Conversely, measurable diplomatic progress in Geneva could temporarily stabilize conditions, though structural disagreements and political pressure in both capitals suggest that volatility will persist even in the event of interim agreements.

Absent a clear diplomatic breakthrough, escalation risk will remain elevated in the coming days, with significant implications for regional stability, maritime trade, aviation operations, energy markets, and the security posture of diplomatic missions across the Middle East.

US Could Be Prepared to Strike Iran by End of Week

Updated at 06:46 PM GMT, Feb 23, 2026

Current Situation

Several media outlets, including [CBS](#), [CNN](#), and the [New York Times](#) report that US President Trump is considering strikes on Iran, with some claiming that military action could take place as soon as the weekend of 21-22 February, although the president has reportedly not yet made a final decision. Other outlets, including Reuters, have [quoted](#) US officials as saying that “full forces should be in place by mid-March.” Following Tuesday’s talks, US officials had said that Iran must return a [detailed proposal](#) in two weeks regarding its nuclear program and other key discussion points. During negotiations in June 2025 over Iran’s nuclear program, US officials had laid out a similar timeline that was followed by the launching of Operation Midnight Hammer a few days later.

In light of the possibility of US strikes occurring in the coming days, Polish Prime Minister Donald Tusk is encouraging citizens to leave Iran, [warning](#) that “evacuation may no longer be possible” within hours. Across the region, especially in Israel and countries hosting US bases, authorities are bracing for potential fallout after

repeated [Iranian threats](#) to escalate any retaliation into a regional conflict.

Impacts

- **Growing government calls for citizens to leave Iran could provoke duty-of-care considerations and will increase competition for flights out of the country.** In addition to [earlier warnings to US citizens](#), Polish Prime Minister Donald Tusk is [now calling](#) for citizens to leave amid the recent escalations, citing the potential that it may become unsafe to do so within hours. The growing pressure for foreigners to leave the country will likely strain Iran's air travel industry, and difficulties in accessing commercial flights could lead to home-country repatriation flights or other emergency solutions. The US Department of State has recommended that travelers to Iran to have evacuation plans in place, to prepare to evacuate by ground to neighboring countries if necessary, and to be capable of leaving the country without US support in the event of an emergency.
- **Communities and businesses in Iran, which have faced heightened disruptions for months amid violent unrest and other challenges, will suffer further impacts in the event of a conflict.** Significant [economic costs](#) have been noted due to lost business activity and material damages amid increasingly frequent [utility](#) and [telecommunications](#) outages, [collapsing currency](#), and [wider unrest](#) facing the country. These challenges compound [frustrations with the regime](#) that underpinned recent mass protests, and could lead to broader and increasingly dangerous unrest if a conflict with the US disrupts access to key necessities.
- **Regional governments and other stakeholders are on heightened alert for potential reprisal attacks targeting American military installations or other important sites.** Israel, in particular, has used national defense communications systems to advise citizens to stock up on necessities and be prepared to shelter in place in the event of a conflict, though the country has not changed its official defense posture. Germany's Defense Ministry also [evacuated soldiers](#) from a base in Erbil, Iraq, due to fears that the facility could be targeted by an Iranian reprisal attack.
- **While oil prices have fluctuated amid the uncertainty, industry analysts believe the current "[Iran premium](#)" suggests minimal disruptions to the global supply.** Observers say that the 19 February premium of between \$7 and \$10 per barrel over peacetime prices is "small enough to reflect that the market believes there won't really be any disruption to crude supplies through the Strait of Hormuz." This assessment suggests a range of possible outcomes, including that Iran and the US will reach a deal prior to any military action, that Iran will refrain from disrupting traffic through the Strait, or that the US and regional partners will be able to prevent Iran from blocking the Strait should conflict break out.

Outlook

The growing number of media outlets, analysts, and other expert observers warning of a pending large-scale attack lends credibility to that outcome. Trump himself has suggested that a final decision is likely to be made in the [next 10 days](#), with commentary by sources inside his administration suggesting that the decision has not been made yet. Still, with the USS Gerald R Ford potentially arriving to the region days earlier than initially anticipated and with dozens of US warplanes deployed to Europe and the Middle East, [reports](#) that the US military could be in position to launch a large-scale operation by 21 February are substantiated. The exact nature and objectives of any military operation the US may pursue is unclear, although the military has [reportedly](#) prepared for the possibility of a sustained, weeks-long operation.

Exactly how Iran and its allies, including Russia and various proxy groups across the Middle East, would respond to an open conflict remains unclear. Iranian leaders have warned for months that a future attack on Iran by Israel or the US would provoke a regional war, with potential fallout such as strikes or clandestine operations targeting American bases or businesses throughout the Middle East. Iran would also be expected to re-engage Israeli in missile volleys, which raises the potential for collateral damage along missile flight paths. Additionally, during the recent naval exercises involving Iranian and Russian forces, Iranian forces were observed [rehearsing vessel boarding](#) procedures, which could indicate plans to disrupt trade in the Strait of Hormuz in the event of a conflict.

US Officials Urge Iran to ‘Make a Deal’ as Tehran Issues NOTAM Ahead of War Games With Russia

Updated at 07:38 PM GMT, Feb 19, 2026

Current Situation

After Iranian authorities [issued a notice to airmen](#) (NOTAM) effective 19 February, US government officials have walked back earlier claims of progress in talks with Iran, and Israeli defense officials are reportedly raising their alert level. Observers are growing concerned that US President Trump’s frustrations with the pace of progress are increasingly likely to lead a large-scale attack in the coming days.

Iranian officials announced that the NOTAM, which will cover areas across the country’s south from 330 GMT to 1330 GMT on 19 February, was issued to warn aviators of expected rocket launches and other military activities associated with a planned joint naval exercise with Russia. The planned exercises follow two days of simultaneous peace talks and military exercises that also saw the temporary partial closure of the Strait of Hormuz, though trade was not disrupted.

Statements were made on 18 February by both US Vice President Vance, who [claimed](#) that Iran failed to address key US concerns during the Geneva talks, and White House Press Secretary Karoline Leavitt, who [warned](#) that it would be “wise to make a deal.” Despite this, other comments by Leavitt suggested that President Trump continues to prefer a diplomatic solution, and that Iran is expected to need weeks to prepare for the next round of negotiations, which would suggest that a strike may not be imminent. [Oil prices rose](#) nearly 4.6% on 18 February over the uncertainty.

A growing number of US media outlets [report](#) that eventual US military action could take the form of “a massive, weeks-long campaign that would look more like full-fledged war than last month’s pinpoint operation in Venezuela.” House Democratic Leader Hakeem Jeffries, meanwhile, [declared](#) that Congress must approve further military action against Iran, though President Trump has repeatedly launched strikes of varying scope and scale without Congressional approval.

An attack could see US and Israeli forces cooperating in an effort to bring down the Iranian regime, a possibility seemingly supported by Israeli Prime Minister Netanyahu’s pressure campaign to secure [maximal concessions](#) from Iran. Regional outlets report that Israel is on high alert, though it is unclear how much of this is coincidental with a security increase timed to coincide with [Ramadan](#) and Home Front Command has [stressed](#) that no change in security guidance has been announced at the time of publication.

Geneva Talks Lead to ‘Clearer Path Ahead’ for Iran; Strait of Hormuz Temporarily Closed for Military Exercises

Updated at 11:17 PM GMT, Feb 18, 2026

Current Situation

Iranian Foreign Minister Abbas Araghchi [announced](#) that the country saw a “clearer path ahead” for negotiations with the US on the country’s nuclear program following [17 February talks](#) in Geneva. While some observers expressed concerns surrounding the speedy end to the meeting (after less than four hours), Araghchi claimed that negotiators had reached an understanding on the “[general guiding principles](#)” for progress in future talks. Araghchi noted a more “serious” and “constructive” atmosphere at the latest meeting and said that a third round of negotiations would be held on an undecided future date after both sides have the opportunity to draft terms for a deal.

Despite the progress toward negotiations, both sides continue to escalate militarily. Ahead of the talks and amid ongoing “[around-the-clock flight operations](#)” by the USS Abraham Lincoln, the Islamic Revolutionary Guard (IRGC) announced the [temporary, partial closure](#) of the Strait of Hormuz to conduct live-fire naval exercises. The “[Smart Control of the Strait of Hormuz](#)” drills launched on 16 February mean “to assess the readiness of operational units, review security plans and rehearse scenarios for responding to any security and military threats in the area.”

The continued escalation of military activity in the region raises the risk of an accident or miscalculation. However, any market concerns over the risk of disruptions to the energy trade appear to have been [tempered by optimism](#) about the prospect for a deal, with oil prices falling back some after climbing in response to threats from US President Trump. Still, [threats](#) from either Trump or Iranian Supreme Leader Ayatollah Ali Khamenei could lead to further escalations, including more disruptive closures of the Strait or other moves that impact exporters’ ability to move oil out of the region.

Outlook

Iranian negotiators are believed to be [willing to compromise](#) on key issues, including pausing further uranium enrichment and moving stockpiles offshore in exchange for sanctions relief. Whether this materializes in the country’s draft terms is yet to be seen. The timing of the next round of talks is also important amid concerns about the potential for further foot-dragging after delays between the first and second round of talks irritated Trump and led to escalating threats and the military buildup now on display in the region. Whether the Trump administration is willing to accept further delays before the next round of talks is unclear.

While Trump has repeatedly insisted that he [prefers a negotiated resolution](#), pressure from Israeli Prime Minister Benjamin Netanyahu—who continues to assert the need for [maximal concessions](#) such as the end of both Iran’s nuclear and ballistic missile programs—could influence Trump’s calculus. The deployment of enough US forces to the region to sustain a high-intensity campaign [for weeks, quips](#) about the safety of Supreme Leader Khamenei, and other recent developments could be indicative of Trump’s willingness to escalate to a full-blown conflict, which would have significant impacts for regional security and global trade.

Iran – Elevated Tensions Persist Ahead of Geneva Talks

Updated at 05:29 PM GMT, Feb 17, 2026

Current Situation

US–Iran tensions have escalated as diplomatic engagement continues alongside visible preparations for potential military conflict. Two US officials told Reuters that the US military is preparing for the possibility of sustained, weeks-long operations against Iran should President Donald Trump order an attack. The planning, described as sensitive and ongoing, suggests a potential conflict scenario more extensive than previous limited exchanges between the two countries and raises the stakes for diplomacy currently underway.

In parallel, the United States is expanding its regional military footprint. Late last week, Washington announced the deployment of the USS Gerald R Ford carrier strike group from the Caribbean to the Persian Gulf. As the world's largest aircraft carrier, its arrival will add thousands of additional personnel, fighter aircraft, guided missile destroyers, and supporting assets to an already substantial US presence centered around the USS Abraham Lincoln carrier group. The dual-carrier posture would enhance the US capacity to conduct sustained air and naval operations once fully in place.

Diplomatic efforts continue despite the heightened military posture. US envoys Steve Witkoff and Jared Kushner are scheduled to hold negotiations with Iranian representatives on Tuesday in Geneva, with Omani officials acting as mediators. Switzerland confirmed that Oman would host the talks in Geneva and reiterated its willingness to provide a location to facilitate dialogue between the United States and Iran. The Iranian delegation is expected to be led by Foreign Minister Abbas Araghchi, with Omani Foreign Minister Badr al-Busaidi also expected to attend. US Secretary of State Marco Rubio cautioned that while President Trump prefers a negotiated solution, reaching a deal with Tehran would be “very hard.”

Speaking to US troops at Fort Bragg, President Trump suggested that regime change “seems like that would be the best thing that could happen,” comments that may further complicate diplomatic efforts. Following talks with Israeli Prime Minister Benjamin Netanyahu in Washington, Trump stated that no “definitive” agreement had been reached on how to proceed with Iran, though he insisted negotiations would continue.

Israeli involvement remains a critical variable. Netanyahu's visit to Washington included discussions on proposed principles for negotiations and intelligence assessments related to Iran's military capabilities. Israeli officials continue to express concern over Iran's missile stockpiles and nuclear trajectory, potentially influencing US decision-making regarding the scope and pace of diplomatic engagement.

Impacts

- **The expansion of US military assets in the region, combined with reported contingency planning for sustained operations, increases the potential scale and duration of disruption should negotiations fail.** While the USS Gerald R. Ford carrier strike group is still en route to the region, its deployment signals US preparedness for prolonged engagement rather than limited exchanges. Once in theater, the addition of the Ford to the existing USS Abraham Lincoln strike group would enhance US capacity to conduct sustained air

and naval operations.

- **Maritime risk remains elevated across the region.** The dense concentration of US naval assets already in the area, combined with prior Iranian boarding and seizure activity, increases the likelihood that commercial vessels may face delays, rerouting, elevated insurance premiums, or precautionary avoidance of sensitive transit corridors. Any escalation involving Iranian threats to target US assets or regional bases could quickly affect shipping through the Strait of Hormuz, a critical chokepoint for global energy markets.
- **Aviation and regional travel remain vulnerable to rapid disruption.** During the 2025 conflict, widespread airspace closures and rerouting significantly impacted commercial flights across the Middle East. The current elevated military posture, alongside explicit Iranian warnings that US bases in the region would be targeted in the event of conflict, heightens the risk of airspace restrictions or flight cancellations should tensions escalate further.
- **Even absent open conflict, the parallel pursuit of diplomacy and military preparation sustains a volatile operating environment.** Businesses operating across the Middle East may continue to face higher insurance costs, precautionary security measures, travel advisories, and fluctuating logistics timelines as governments and commercial operators hedge against potential escalation.
- **Israeli engagement with Washington introduces an additional variable.** Continued Israeli advocacy for firm measures against Iran's nuclear and missile programs could influence US decision-making, particularly if diplomatic progress stalls.

Outlook

Diplomatic engagement and military preparation are now advancing in parallel. While the next phase of talks, scheduled for Tuesday in Geneva, provides a structured channel for continued negotiations, the expansion of US force posture and reported contingency planning for sustained operations indicate that Washington is preparing for the possibility that talks may fail.

In the near term, the operating environment is likely to remain tense and fluid. The movement of additional US naval assets and explicit Iranian warnings regarding regional retaliation increase the stakes surrounding upcoming negotiations. Absent measurable diplomatic progress, escalation risks will remain elevated across the region, with potential implications for maritime traffic, aviation, energy markets, and regional stability.

No Date for New Talks as Trump to Meet With Netanyahu and US Advises Ships to Avoid Iran's Waters

Updated at 06:28 PM GMT, Feb 14, 2026

Current Situation

A top security adviser to Iranian Supreme Leader Ayatollah Ali Khomeini is [in Oman for talks](#) with head-of-state Sultan Haitham bin Tariq Al Said and Foreign Minister Badr al-Busaidi, a key mediator in ongoing negotiations with the US regarding Iran's nuclear program. Some observers have expressed concern that Tehran may be [stalling talks](#) in order to better position its military resources and nuclear program for adverse outcomes.

However, Iranian negotiators are also said to be [increasingly open](#) to diluting their uranium enrichment ambitions in exchange for significant sanctions relief, demonstrating the regime's potential [willingness to compromise](#) in order to reach an agreement. Iranian Foreign Minister Abbas Araghchi also contacted peers in Egypt, Saudi Arabia, and Türkiye to keep them informed of the state of negotiations as those discussions continue.

Meanwhile, Israeli Prime Minister Benjamin Netanyahu is [expected to meet](#) with US President Donald Trump on 11 February after traveling to Washington, where he will present proposed "[principles for negotiations with Iran](#)" seen as in the mutual interest of both Israel and the US. Netanyahu is [expected to return](#) to Israel on 12 February. Global media outlets [report](#) that Netanyahu "plans to present Trump with fresh intelligence on Iran's military capabilities" and options for military action in the country.

Israeli intelligence assesses that Iran could have a stockpile of up to 2,000 missiles within weeks, a significant rearmament following the 12-day conflict between Iran and Israel in 2025 that saw thousands of missiles launched in both directions. Iranian officials have repeatedly flagged that they [will not negotiate](#) on missile production and stockpiling as part of the nuclear talks, an important sticking point that could drive Washington to employ more forceful measures such as direct strikes.

Amid the great degree of uncertainty surrounding the future of talks, the Maritime Administration of the US Department of Transportation is [warning against](#) US-flagged vessels sailing near Iranian waters in case negotiations sour, citing a perceived threat of "Iranian illegal boarding/detention/seizure." The warning—and, more broadly, the deployment of significant US military resources to the region, recommendation that vessels attempt to refuse boarding by Iranian forces, and other provocative measures—could significantly impact logistics and shipping costs for vessels plying the Gulf of Oman and Persian Gulf. Insurance rates, voyage times, and other signpost metrics are likely to worsen at least in the near-term in response to the uncertainty, and could impact trade globally.

Demonstration activity denouncing both the regime and the US military pressure campaign has also created more localized disruptions around the world, which have on some occasions grown to a significant scale or [escalated dramatically](#). With Reza Pahlavi, the exiled heir to Iran's royal family, calling for a major worldwide

“[day of action](#)” on 14 February, further disruptions can be expected in population centers in the coming days.

Impacts

- **Drawn-out talks provide both Iran and the US with additional time to prepare for conflict, raising the risk of significant clashes.** The dragging-on of negotiations may have given Iran the opportunity to continue repositioning and producing important defense resources to prepare for future strikes (or even to go on the offensive), but it also allowed the US time to bring a significant [arsenal of naval assets](#) into the Gulf of Oman. A similar force posture to what was deployed off the coast of Venezuela in the lead up to the 03 January operation to capture President Maduro is now present in the region, suggesting that the US is prepared for large-scale or extensive operations over a long duration if necessary.
- **The stalled talks create an opportunity for Israeli officials to advocate for more direct action.** Israeli officials have long sought to undermine Iran’s nuclear program and destroy its missile stockpiles, with the 2025 conflict between the two countries just the latest in a decades-long series of operations targeting Iranian [nuclear scientists](#), [facilities](#), and other important aspects of Tehran’s nuclear research. Continued delays could encourage the Trump administration to employ more forceful measures and will provide an opening for Israeli officials to advocate for a more lasting solution to the security threat they perceive from Tehran.
- **Even if conflict is avoided in the near-term, regional operations, residents, and travelers will continue to face disruptions.** Negotiations on Iran’s nuclear program have ebbed and flowed for years, with periods of tension often punctuated by the threat of military action in either direction. Whenever tensions rise, people and firms across the Middle East face knock-on impacts ranging from [increased insurance rates](#) to logistics and travel disruptions. Additionally, the long history of preceding deals collapsing (and the frequent saber-rattling in both Tehran and Washington) suggest that any progress toward an agreement in the near-term will not necessarily preclude a future turn toward conflict once again. In many cases, this uncertainty, coupled with official travel warnings that may trigger duty-of-care obligations under host company guidelines, could trigger an exodus of personnel from the region until tensions ease.
- **Alongside the issues of Iran’s nuclear program and another potential military intervention, the regime's treatment of demonstrators during recent unrest continues to drive localized disruptions around the world.** Organizers have targeted perceived US overreach, the Trump administration in particular, and other aspects of the ongoing negotiations with demonstration activity. However, demonstrations against the regime itself—many stemming from the [widespread repression](#) witnessed during nationwide unrest in late 2025 and early 2026—is also increasingly common. In some cases, these demonstrations have attracted thousands of attendees and disrupted local traffic, with at least one incident noted in which an individual [drove into a crowd](#) of demonstrators in Los Angeles. Reza Pahlavi, exiled heir of the Iranian royal family, has called for a [global day of action](#) to denounce the regime on Saturday, 14 February. Pahlavi has taken an increasingly prominent role in the movement for change in Iran, and similar calls to action have attracted strong turnout, suggesting that these demonstrations could disrupt local operations where they occur.

Outlook

Tehran and Washington's continued readying of defense assets as negotiations make little progress suggests that military activity will continue rising across the region, at least in the near term and regardless of any progress toward limiting Iran's nuclear ambitions. President Trump has suggested that additional forces—potentially even a [second carrier strike group](#)—could be deployed to the region if the latest talks collapse, a move which would dramatically increase the US capacity to engage in and sustain a far-reaching conflict. Meanwhile, the increased naval activity in both the Persian Gulf and the Gulf of Oman is once again raising fears that traffic through the Strait of Hormuz could be impacted, especially if Iran were to blockade it (a move which it has threatened in the past, and which would [severely disrupt](#) global energy supply chains).

Any open conflict in the region would also disrupt key global supply chains for other exports from the Middle East, as well as goods produced in other markets shipped through regional ports, airspace, or via near-shore shipping lanes. Travel would also be severely impacted, with the [widespread disruptions](#) to flights crossing the region noted during the 2025 conflict emblematic of what can be expected in the event of fresh conflict. Iranian officials' [insistence](#) that they plan to strike US bases in nearby countries in the event of an attack only increases the likelihood that air travel across the broader region will be impacted, and the latest tensions have already led several airlines to [cancel or reschedule](#) flights in the region.

What remains to be seen is the extent to which Israel will be able to influence the Trump administration's decision-making on whether to strike Iranian targets, as well as Israel's eventual role in those attacks. While the Israel Defense Forces committed significant resources to the 2025 conflict, ongoing operations in Gaza and Lebanon could prevent the military from striking Iran with maximum effect in 2026. Reports of a planned offensive to [forcibly disarm Hamas](#) in Gaza would require significant resources and only further limit that capacity.

Faced with these limitations, as well as significant pushback from a war-weary public, Israeli officials will likely seek to undermine Iran-US talks in hopes of encouraging an escalation, rather than engaging Tehran unilaterally as it did in 2025. [Iranian officials](#) warned against allowing Netanyahu's trip to Washington influence Trump's decision-making, though Trump has said that while negotiations are "different" this time around, he remains confident that a "great deal with Iran" can still be made. Still, given the Israeli pressure for maximal gains and [other factors](#) such as an ongoing [crackdown on political opposition](#) in Iran, many observers are now concerned that a negotiated solution is an increasingly distant prospect.

Heightened Tensions Persist Ahead of Further US–Iran Talks

Updated at 10:37 PM GMT, Feb 10, 2026

Current Situation

Talks between the United States and Iran held on Friday, 06 February, have been followed by additional diplomatic activity and heightened political signaling, reinforcing that broader tensions remain elevated despite ongoing engagement. While both sides have indicated that follow-up discussions are expected, the timing of the next round of talks has not yet been confirmed.

US President Donald Trump stated over the weekend that Washington and Tehran are likely to meet again this week and warned of “very steep” consequences if negotiations fail, while also asserting that talks are progressing and that Iran “wants to make a deal.” Iranian officials, meanwhile, have continued to emphasize deterrence alongside engagement. In an interview with Al Jazeera, Iranian Foreign Minister Abbas Araghchi warned that Iran would retaliate against US military bases across the Middle East if Washington conducts strikes inside Iran, underscoring Tehran’s focus on regional deterrence and the vulnerability of US assets distributed throughout the region.

Diplomatic activity involving Oman continues to suggest sustained mediation efforts. Iran’s top security official, Ali Larijani, head of the Supreme National Security Council, is scheduled to visit Muscat on Tuesday, according to Iranian state media. Larijani is expected to meet with senior Omani officials to discuss recent regional and international developments and bilateral cooperation, a visit that comes just days after the resumption of talks between Tehran and Washington under Omani mediation. The visit highlights Oman’s continued role as a key intermediary and suggests parallel diplomatic channels remain active even as formal talks remain undefined.

The United States continues to pair engagement with visible military signaling. Over the weekend, President Trump’s Middle East envoy Steve Witkoff and Jared Kushner visited the USS Abraham Lincoln aircraft carrier following the conclusion of talks, reinforcing the scale and proximity of US military forces operating in the Arabian Sea. The visit followed the participation of US Central Command Commander Admiral Brad Cooper in the talks themselves, underscoring Washington’s intent to maintain a robust deterrence posture alongside diplomacy.

Regional dynamics are also drawing in key US partners. Israeli Prime Minister Benjamin Netanyahu is scheduled to meet with President Trump in Washington on Wednesday, with discussions expected to include the trajectory of US–Iran talks and broader regional security considerations. The engagement underscores Israel’s close interest in the negotiations and their potential implications for deterrence and military posture across the region.

Domestically, Iran enters a sensitive period as the country marks the 47th anniversary of the Islamic Revolution this week. While large-scale protests have subsided amid an expanded security presence and prolonged internet restrictions, public sensitivity remains high, particularly amid economic strain and heightened nationalist messaging. This combination increases the risk that security incidents, sanctions impacts, or symbolic dates could act as catalysts for localized unrest or intensified enforcement measures.

Impacts

The convergence of diplomatic engagement, escalatory rhetoric, new sanctions, and sustained military and maritime activity continues to generate a complex and elevated risk environment for businesses operating in or around Iran and the wider region.

- Maritime and logistics risks remain a primary concern. Iranian enforcement actions, including the recent seizure of foreign oil tankers in the Persian Gulf and earlier attempts to halt commercial vessels in the Strait of Hormuz, underscore the potential for disruption to shipping, energy transport, and supply chains transiting key waterways. Even where vessels are not directly targeted, heightened enforcement and military activity increase the risk of delays, rerouting, and higher insurance premiums for shipping, energy, and logistics providers.
- Personnel safety and mobility risks remain elevated. The US Virtual Embassy's directive urging American citizens to leave Iran and prepare independent departure plans reflects concerns about the potential for rapid deterioration in the security environment. While the advisory is US-specific, it may prompt multinational firms to reassess duty-of-care obligations, evacuation readiness, and staffing levels for both expatriate and local employees operating in Iran and the wider region.
- Travel and aviation impacts across the region remain a consideration. Heightened tensions involving Iran, the United States, and Israel have previously prompted flight disruptions, airspace avoidance measures, and updated travel advisories across parts of the Middle East. The continued presence of US military assets and Iran's emphasis on regional retaliation increase the likelihood of short-notice airspace restrictions, route adjustments, or advisories affecting business travel and crew movement.
- Sanctions-related exposure continues to expand. The rollout of new US sanctions targeting Iranian oil exports following the talks reinforces the likelihood of sustained or intensified economic pressure regardless of ongoing engagement. Companies involved in energy, shipping, finance, insurance, and commodities trading face heightened risk.
- Inside Iran, the operating environment remains fragile. Although large-scale protests have subsided, prolonged internet restrictions, heightened security presence, and economic strain continue to affect business continuity, communications, and workforce stability. Public sensitivity around security incidents and politically significant dates increases the risk of sudden localized disruptions or enforcement actions.

Outlook

While talks between the United States and Iran have taken place and follow-up discussions appear likely, they have not materially reduced broader tensions across the region. Both Washington and Tehran continue to pursue a dual-track approach, pairing diplomatic engagement with sustained military readiness, sanctions enforcement, and deterrent signaling.

Attention will now focus on intermediary diplomacy, including Oman's ongoing role, upcoming political engagements involving the United States and key regional partners, and signals surrounding any next meeting between Washington and Tehran. The primary risk remains a continued pattern of deliberate military, maritime, and economic pressure designed to shape negotiating leverage. Absent a clear diplomatic breakthrough, the operating environment is expected to remain volatile, with sustained risk to commercial operations, shipping, aviation, and personnel movement in and around Iran.

In addition to the diplomatic discussions and tensions in the Middle East, members of the Iranian diaspora continue to hold demonstrations globally, urging the US to take a more aggressive role in displacing the current government in Tehran. Exiled Iranian Crown Prince Reza Pahlavi has called for a "Global Day of Action" on February 14, with major gatherings expected in several cities, including Los Angeles, Toronto, and Munich, where an [estimated](#) 100,000 demonstrators are expected to take to the streets alongside the Munich Security Conference.

Elevated Security Environment Persists Following US–Iran Talks

Updated at 06:10 PM GMT, Feb 09, 2026

Current Situation

Talks between the United States and Iran took place on Friday, 06 February, marking a significant but limited instance of engagement amid sustained regional tensions. The discussions concluded with agreement by both sides to hold follow-up talks, though neither the timing nor the location of future meetings has been finalized. Iranian Foreign Minister Abbas Araghchi described the talks as a "good start," stating that an agreed framework for future negotiations could be achievable if the process continues along the same trajectory. The talks were mediated by Omani officials and occurred against a backdrop of heightened military readiness and economic pressure.

The US delegation included White House envoy Steve Witkoff and Jared Kushner, who were joined by US Central Command Commander Admiral Brad Cooper. His participation served as a visible reminder of the scale and proximity of US military forces in the region, particularly the sustained US naval and air presence in the Arabian Sea, underscoring Washington's intent to pair diplomatic engagement with a robust deterrence posture.

Shortly after the talks concluded, the United States announced new sanctions targeting Iranian oil exports, signaling that economic pressure will continue in parallel with diplomatic engagement. Separately, the US Virtual Embassy in Iran issued a security alert urging American citizens to "leave Iran now" and to prepare departure plans that do not rely on US government assistance, highlighting ongoing concern over the security environment and the

potential for rapid deterioration.

Domestically, Iran remains fragile following weeks of unrest tied to economic pressures and political grievances. While large-scale demonstrations have subsided amid an expanded security presence and prolonged internet restrictions, public sensitivity to security-related incidents remains high. This fragility increases the risk that future incidents, sanctions impacts, or rumors could rapidly fuel unrest or misinterpretation.

Impacts

The convergence of diplomatic engagement, new sanctions, and sustained military and maritime activity continues to generate a complex and elevated risk environment for businesses operating in or around Iran and the wider region.

- **Maritime and logistics risks remain a primary concern.** Iranian enforcement actions, including the recent seizure of foreign oil tankers in the Persian Gulf and earlier attempts to halt commercial vessels in the Strait of Hormuz, underscore the potential for disruption to shipping, energy transport, and supply chains transiting key waterways. Even where vessels are not directly targeted, heightened enforcement and military activity increase the risk of delays, rerouting, and higher insurance premiums for shipping, energy, and logistics providers.
- **Personnel safety and mobility risks have also increased.** The US Virtual Embassy's directive urging American citizens to leave Iran and prepare independent departure plans reflects concerns about the potential for rapid deterioration in the security environment. While the advisory is US-specific, it may prompt multinational firms to reassess duty-of-care obligations, evacuation readiness, and staffing levels for both expatriate and local employees operating in Iran and the wider region.
- **Travel and aviation impacts across the region remain a consideration.** Heightened regional tensions involving Iran, the United States, and Israel have previously prompted flight disruptions, airspace avoidance measures, and updated travel advisories across parts of the Middle East. While widespread cancellations are not currently reported, the sustained military posture and risk of sudden escalation increase the likelihood of short-notice airspace restrictions, route adjustments, or travel advisories that could affect business travel and crew movement.
- **Sanctions-related exposure continues to expand.** The announcement of new US sanctions targeting Iranian oil exports following the talks reinforces the likelihood of sustained or intensified economic pressure regardless of ongoing diplomatic engagement. Companies involved in energy, shipping, finance, insurance, and commodities trading face heightened risk.
- **Inside Iran, the operating environment remains fragile.** Although large-scale protests have subsided, prolonged internet restrictions, heightened security presence, and economic strain continue to affect business continuity, communications, and workforce stability. Public sensitivity to security incidents or economic shocks

remains high, increasing the risk that localized disruptions, misinformation, or sudden enforcement actions could rapidly escalate into broader operational challenges.

Outlook

While talks between the United States and Iran have now taken place and produced agreement to continue discussions, they have not materially reduced broader tensions across the region. Both Washington and Tehran continue to pursue a dual-track approach, pairing diplomatic engagement with sustained military readiness, sanctions enforcement, and deterrent signaling. Attention will now turn to the timing, location, and substance of the next round of talks, which will be closely watched for indications of whether engagement can meaningfully alter the current risk trajectory.

The primary risk remains a continued pattern of deliberate military, maritime, and economic pressure designed to shape negotiating leverage. Such actions, particularly in congested maritime corridors, contested airspace, and a domestically sensitive Iranian environment, carry an elevated risk of escalation beyond their intended scope. Absent a clear diplomatic breakthrough, the operating environment is expected to remain volatile, with sustained risk to commercial operations, shipping, aviation, and personnel movement in and around Iran.

Elevated Security and Maritime Risks Persist Ahead of US–Iran Nuclear Talks

Updated at 09:54 PM GMT, Feb 06, 2026

Current Situation

Tensions between the United States and Iran remain elevated ahead of confirmed nuclear talks scheduled for Friday, 06 February, in Oman, with the operating environment characterized by sustained military posturing, deterrent rhetoric, and heightened maritime and airspace risks. While neither side appears to be seeking immediate escalation, the proximity of forces and recent incidents underscore a volatile environment with limited margin for miscalculation.

The United States continues to maintain a heightened force posture across the Middle East, centered on the deployment of the USS Abraham Lincoln carrier strike group operating in waters off Oman, supported by accompanying destroyers and elevated regional air and maritime activity. There have been no indications of force

drawdown or repositioning, suggesting Washington intends to sustain deterrence while talks proceed.

Iranian leadership continues to pair diplomatic engagement with deterrent messaging. Supreme Leader Ayatollah Ali Khamenei has reiterated warnings that any US attack would trigger broader regional conflict, messaging amplified by Iranian state media and consistent with Tehran's longstanding deterrence narrative. US President Donald Trump has acknowledged the risks while emphasizing the strength and proximity of US forces and maintaining that negotiations remain possible alongside military options.

Domestically, Iran remains fragile following weeks of unrest linked to economic pressures and political grievances. While large-scale demonstrations have subsided amid an expanded security presence and prolonged internet restrictions, public sensitivity to security-related incidents remains high, increasing the risk that future accidents, attacks, or rumors could rapidly fuel unrest or misinterpretation.

Key Developments

Recent military and maritime incidents illustrate the ongoing risk environment. US forces shot down an Iranian drone that approached the aircraft carrier USS Abraham Lincoln in international waters, and Iranian naval units previously attempted to halt and board a US-flagged commercial tanker transiting the Strait of Hormuz before US naval escorts intervened. In addition, Iranian state television reported that Iranian authorities seized two foreign oil tankers in the Persian Gulf, claiming the vessels were involved in fuel smuggling. Iranian officials did not disclose the nationality or flag state of the tankers. A regional commander with the Islamic Revolutionary Guard Corps Navy stated the vessels were carrying approximately one million liters of fuel, including diesel, and were seized near Farsi Island before being transferred to Bushehr.

Diplomatic engagement is now confirmed following days of uncertainty over format and venue. Talks focused primarily on Iran's nuclear program are scheduled to take place in Muscat, Oman, after extended debate between Washington and Tehran regarding location, timing, and scope. The White House confirmed that the US delegation will include White House envoy Steve Witkoff and Jared Kushner, while Iranian Foreign Minister Abbas Araghchi announced via social media that the talks will be held in the Omani capital. Media reporting citing diplomatic sources indicates that mediators from Qatar, Türkiye, and Egypt have presented both sides with a proposed framework of key principles intended to guide discussions. The talks are expected to remain narrowly focused on nuclear issues, reflecting Iran's preference to limit scope and control negotiating terms.

Impacts

Iran's external relationships continue to deteriorate alongside internal and regional pressures. Relations with Europe have sharply worsened following the European Union's designation of Iran's Islamic Revolutionary Guard

Corps as a terrorist organization, prompting reciprocal political escalation from Tehran and further constraining diplomatic channels at a critical moment.

Separately, a series of explosions reported across multiple Iranian cities in late January has introduced additional uncertainty into the operating environment. Iranian authorities have attributed the incidents to gas leaks, industrial accidents, or environmental fires, while observers note similarities to past covert activity initially framed as infrastructure failures. Definitive attribution remains unavailable, but the pattern reinforces perceptions of a complex and opaque security environment.

Regionally, diverging threat perceptions among US partners persist. Saudi Arabia's posture appears to be evolving, with senior Saudi officials reportedly signaling to US counterparts that failure to follow through on pressure against Iran could strengthen Tehran, highlighting fractures in regional risk assessments even as concerns about broader conflict remain.

Outlook

In the near term, the confirmed Oman talks provide a structured channel for engagement but are unlikely to materially reduce tensions absent clear progress. Both Washington and Tehran appear committed to maintaining strategic ambiguity, pairing sustained military readiness and deterrent rhetoric with tightly constrained diplomatic engagement focused on nuclear issues.

The primary risk is a continued pattern of deliberate military and maritime pressure designed to shape negotiating leverage. Such actions, particularly in congested maritime corridors and contested airspace, carry an elevated risk of triggering broader escalation, even if initially intended to remain limited.

Maritime Incidents Heighten Tensions, Endanger US-Iran Talks

Updated at 08:36 PM GMT, Feb 05, 2026

Key Developments

- **Iran–US tensions remain high amid a mix of tactical military friction and fragile diplomatic overtures.** Recent operational incidents illustrate the volatility of the current environment: US forces [shot down](#) an Iranian drone approaching the aircraft carrier USS *Abraham Lincoln*, and Iranian [gunboats](#) attempted to stop and board

a US-flagged commercial tanker in the Strait of Hormuz before US escorts intervened. These events reflect a pattern of close-quarters encounters at sea and in airspace that could quickly escalate with limited warning.

- **Diplomatic efforts continue but face significant structural challenges.** [Reporting](#) indicates Iran is seeking to change the format and venue of planned nuclear talks, moving talks from Türkiye to Oman and favoring a strictly bilateral, nuclear-only discussion over broader multilateral negotiations previously envisaged in Istanbul. This push has introduced fresh uncertainty about whether and how talks will proceed. Iran's preference for limiting the agenda and venue suggests Tehran is seeking to constrain scope and control terms, contrasting with US expectations for a more comprehensive framework.
- **The central risk remains miscalculation in dense operational environments.** The combination of heightened military activity, close reconnaissance interactions, and evolving diplomatic signals increases the likelihood that a tactical incident—whether a misread unmanned aerial system, an escalation in maritime harassment, or an unplanned engagement—could precipitate broader conflict. These risks are amplified by competing narratives on both sides about intent and red lines, and by Iran's insistence on controlling negotiation formats even as it signals willingness to engage.

Iran, US Maintain Escalatory Rhetoric as Military Posture and Diplomatic Signaling Continue

Updated at 11:04 PM GMT, Feb 03, 2026

Current Situation

Over the weekend, tensions between the United States and Iran remained elevated, driven primarily by hostile rhetoric, sustained US military posture in the region, and Iranian deterrence messaging warning of broader regional conflict. While no direct military action occurred, parallel diplomatic maneuvering and military signaling underscored a volatile environment with limited room for miscalculation.

Iranian Supreme Leader Ayatollah Ali Khamenei warned on Sunday that any US attack would spark a “regional war,” a message amplified by Iranian state media and consistent with Tehran's longstanding deterrence narrative. Responding to the remarks, US President Donald Trump acknowledged the warning while emphasizing the proximity and strength of US naval forces in the region and reiterating that Washington continues to pursue a deal, though military options remain available if negotiations fail.

US Central Command continues to maintain a heightened force posture across the Middle East, centered on the deployment of the USS Abraham Lincoln carrier strike group, which is assessed to be operating in waters off

Oman. The carrier is supported by accompanying destroyers and elevated regional air and maritime activity across the region, reinforcing a deterrence and rapid response posture. As of Monday, there have been no indications of force drawdown or repositioning.

As of early this week, limited de-escalatory signals have emerged. Iranian officials have indicated openness to renewed nuclear-focused engagement through intermediaries, while publicly maintaining hardline positions. This diplomatic messaging follows recent satellite imagery confirming new construction activity at Iran's Isfahan and Natanz nuclear facilities, developments likely to complicate negotiations and reinforce Western concerns regarding Iran's nuclear trajectory. No material concessions have been signaled, with sanctions relief and Iran's missile program continuing to represent key obstacles. Market reaction, including easing oil prices, suggests a perception of reduced near-term escalation risk, though underlying volatility remains.

Impacts

- **Iran's relationship with Europe deteriorated further following the European Union's decision to designate Iran's Islamic Revolutionary Guard Corps as a terrorist organization, citing the violent repression of demonstrators in recent weeks.** In response, Iran summoned EU ambassadors to formally protest the move, with Foreign Ministry officials calling the designation a "strategic mistake" and warning that countermeasures are under consideration. Iran's parliament escalated the rhetoric by declaring that it now considers all EU militaries to be terrorist organizations, signaling a sharp increase in political tension with European capitals. The move further strains diplomatic channels and reduces Europe's ability to serve as an effective intermediary at a time of heightened regional instability.
- **Separately, a series of explosions reported across multiple Iranian cities over the weekend has introduced additional uncertainty into the operating environment.** Iranian authorities have publicly attributed the incidents to domestic gas leaks, industrial accidents, or environmental fires, maintaining that they do not have a security or sabotage origin. However, reporting indicates that explosions occurred across as many as seven cities on 31 January, exhibiting characteristics consistent with past covert operations that were initially framed as infrastructure failures. While definitive attribution remains unavailable, the pattern and geographic spread of the incidents have raised questions among observers monitoring potential external or clandestine activity.
- **Regionally, Saudi Arabia's posture toward potential US action appears to be evolving.** Saudi Defense Minister Prince Khalid bin Salman reportedly told US officials during a private briefing in Washington that failure to follow through on threats against Iran could ultimately strengthen the Iranian regime, according to sources cited by US media. The comments marked a notable shift from Saudi warnings just weeks earlier against military strikes and concerns over a broader regional war, highlighting diverging threat perceptions among US partners.

- **Domestically, Iran remains fragile following weeks of unrest tied to economic pressures and political grievances.** While large-scale protests have subsided amid an expanded security presence and prolonged internet restrictions, public sensitivity to security-related incidents remains high, increasing the risk that future accidents, attacks, or rumors could rapidly fuel unrest or misinterpretation.

Outlook

In the near term, the absence of overt US military action slightly reduces immediate escalation risk but does not materially ease broader tensions across the region. Both Washington and Tehran appear committed to maintaining strategic ambiguity, pairing deterrent rhetoric and military readiness with limited diplomatic outreach through intermediaries. Iran is likely to continue publicly emphasizing deterrence and resilience while quietly testing diplomatic pathways focused on nuclear issues. Talks on Iran's nuclear program are reportedly arranged for Friday in Istanbul between White House envoy Steve Witkoff and Iranian Foreign Minister Abbas Araghchi. While plans for the talks have not been finalized, if they move forward they will mark the first meeting between US and Iranian officials since the 12-day war in June 2025.

At the same time, new construction activity at key nuclear facilities and the sharp deterioration in Iran–EU relations reduce diplomatic flexibility and increase the risk of additional political or economic retaliation. Absent a clear diplomatic breakthrough, the operating environment is expected to remain volatile as sustained force posture, hardened rhetoric, potential covert activity, and constrained diplomatic channels all render the situation highly sensitive to miscalculation or an unexpected triggering event.

Iran, US Exchange Escalating Rhetoric as US Aircraft Carrier Enters Region

Updated at 03:55 PM GMT, Feb 02, 2026

Current Situation

The United States has significantly increased its military presence in the Middle East amid heightened tensions with Iran, deploying the USS *Abraham Lincoln* carrier strike group with accompanying destroyers, F-15E and F-35 fighter jets, and thousands of additional personnel to the Gulf region, while US Central Command has announced multi-day aerial readiness exercises. Senior US officials, including President Trump, have stated that a “massive armada” of US forces is moving toward Iran and that any de-escalation would depend on Tehran halting its nuclear program and ending violent domestic crackdowns, while maintaining that negotiations remain possible under

defined terms. In response, Iran has announced plans to conduct live-fire military drills in the Strait of Hormuz, widely viewed as a signal of deterrence and a warning against further US military activity in the region.

Domestically, nationwide demonstrations in Iran that began on 28 December 2025 over the sharp devaluation of the rial and broader economic grievances appear to have subsided from their early-January peak, amid an expanded security presence and a prolonged internet outage that continues to limit independent verification of conditions on the ground. While large-scale street protests have become less visible in recent weeks, authorities maintain heightened security measures nationwide, and the true scope of ongoing unrest remains difficult to assess due to restricted communications. The Iranian government officially reports approximately 3,117 protest-related deaths, while independent rights organizations suggest several thousand to tens of thousands of fatalities.

Key Developments and Implications

- US President Donald Trump has issued additional warnings to Iran as the USS *Abraham Lincoln* carrier strike group is assessed to be operating off the coast of Oman. Reporting also indicates increased US military air traffic into bases in Jordan, Qatar, and Diego Garcia, underscoring expanded regional force posture.
- [US officials](#) are evaluating whether limited strikes could incentivize renewed domestic unrest in Iran, which has largely subsided following an extensive security clampdown. Israeli and Arab officials have privately assessed that airstrikes alone are unlikely to destabilize the Iranian government, with US deliberations reportedly including potential strikes on institutions linked to internal repression or on Iran's ballistic missile infrastructure.
- Any US or Israeli strike on Iran would raise the likelihood of [retaliatory](#) action by Iran or its regional proxies. Iran-aligned militias in Iraq and Yemen have issued statements warning of possible escalation, with Yemen's Houthi movement suggesting it could resume attacks on Red Sea shipping and Iraq-based Kataib Hezbollah cautioning that strikes on Iran could trigger broader regional conflict.
- Iran has announced plans to conduct live-fire military exercises in the Strait of Hormuz, which could temporarily disrupt commercial shipping. Iranian officials have previously threatened to block the strait during periods of heightened tension, a move that would likely cause significant volatility in global energy markets.
- The European Union is reportedly moving toward [designating](#) Iran's Islamic Revolutionary Guard Corps (IRGC) as a terrorist organization, a step that would further strain diplomatic relations and potentially expand sanctions enforcement.
- KLM Airlines announced it will not resume flights to Tel Aviv in the near term, while confirming the resumption of flights to Dammam and Riyadh and plans to restart services to Dubai from Friday, 30 January.

Protests Appear to Lessen Following Violent Crackdown

Updated at 06:08 PM GMT, Jan 29, 2026

Situation

While difficult to say for certain due to the [ongoing](#) internet and phone blackout, the nationwide protests in Iran appear to have [lessened](#) as of 15 January following the regime's violent crackdown over the preceding days. [Activists](#) say that more than 2,600 people have been killed and thousands more arrested. The Iranian government still has not issued official casualty numbers, but has attempted to project that they are in control of the situation. Iran has also said that it has [no plans](#) to hang any people for their alleged role in the unrest, and Trump has said that he's [heard](#) on "good authority" that the "killing in Iran is stopping."

- An emergency United Nations Security Council meeting has been [called](#) for 3:00 pm ET on Thursday, 15 January, to discuss the situation in the Middle East.
- The Islamic Revolutionary Guard Corps [remains](#) on high alert.
- Iranian President Masoud Pezeshkian said that the government [planned](#) to address issues of corruption and the foreign exchange rate collapse that started the protests.
- Iranians were able to make some [outbound calls](#) on Tuesday, 13 January, although inbound calls were still blocked and internet remains offline with the exception of local, government-approved websites. Security personnel are also reportedly searching for Starlink terminals.
- Armed Kurdish groups have sought to cross into Iran from Iraq, according to reporting from [Reuters](#), although a leader of the Democratic Party of Iranian Kurdistan has said that it is [not yet time](#) for the group to attempt to directly confront the regime.
- The US is [reportedly](#) dispatching a carrier strike group from the South China Sea to the US Central Command area of responsibility, which includes the Middle East. It is expected to take around a week for the carrier group to arrive.

Security Alerts and Flight Disruptions Following US Threat to Intervene

US President Donald Trump canceled a meeting with Iranian officials scheduled on Tuesday, 13 January and [urged](#) demonstrators to keep protesting, saying that "help is on its way" without elaborating further. Trump has reportedly been [briefed](#) on a range of options for intervening in Iran. While no further military action by the US transpired on 14 January, the statements and heightened tensions prompted several warnings and

precautionary measures throughout the region, including advice to avoid military installations and flight disruptions.

- On 14 January, after Trump stated that help is on the way, some US diplomatic missions in the region undertook precautionary measures and issued security alerts. Some personnel at the Al Udeid Air Base, situated just outside Doha, were advised to evacuate, according to [international media](#) citing an anonymous source, and others were [advised](#) to avoid the facility. The source did not indicate if the evacuations were optional or mandatory, nor whether it applied to troops or civilian personnel. However, they did say that other steps were being taken across the region. The US Embassy in Kuwait has issued a [security alert](#) stating that Mission personnel were instructed to temporarily halt movement into facilities at Camp Arifjan, Camp Buehring, Ali Al Salem Air Base, and Camp Patriot. The US Mission to Saudi Arabia has [advised](#) its personnel and others in the country to "exercise increased caution and limit non-essential travel to any military installations in the region."
- Additionally, British forces are also reportedly being [withdrawn](#) from the Al Udeid Air Base. The United Kingdom also updated travel advisories for all countries in the region, encouraging recipients to take precautions, stay away from areas around security or military facilities, and be prepared for travel disruptions and other unanticipated impacts.
- Lufthansa Group said that they will only operate daytime flights to and from Tel Aviv, Israel and Amman, Jordan, citing "the current situation in the Middle East," according to [Israeli media](#). The restrictions will be in place through at least Monday, 19 January.

Other Impacts

- Trump announced that he would place a 25% tariffs on any goods from countries that trade with Iran, a [list](#) that includes China, India, Türkiye, Germany, South Korea, and Japan. However, as of this writing, the tariffs had not been listed in the [Federal Register](#).
- The US [imposed](#) sanctions on several Iranian officials for their alleged role in the crackdown. Officials under sanction include Ali Larijani, the Secretary of the Supreme Council for National Security (SCNS), as well as other commanders with the Islamic Revolutionary Guard Corps. The Department of the Treasury also designated 18 individuals and entities accused of operating "shadow banking" networks to launder money from oil sales.
- The [European Union](#) and the [G7](#) are also considering additional sanctions against Iran.
- Outside of Iran, several diaspora groups have [staged large demonstrations](#) against the regime and in support of the protesters. In Los Angeles, a man [attempted](#) to drive a box truck through one of the demonstrations, although no serious injuries were reported.

Widespread Unrest, Internet Disruptions Reported Across Iran

Updated at 06:41 PM GMT, Jan 15, 2026

Key Takeaways

- Protests in Iran have escalated from strikes in Tehran's Grand Bazaar driven by economic challenges into a nationwide movement spanning more than 110 cities, reflecting broad-based participation and widening grievances that now include explicit challenges to the regime's legitimacy.
- Shopkeepers and laborers emerged as key mobilizing actors as sustained strikes and mass commercial closures severely disrupt trade and daily economic activity, raising the risk of prolonged economic paralysis or impacts to strategic sectors.
- The Iranian government has adopted a heavy-handed security posture marked by widespread personnel deployments, mass arrests, fatalities, and internet blackouts, signaling heightened volatility and raising the likelihood of a further intensification of unrest.
- Internal unrest is unfolding alongside rising external pressure from the United States and Israel, creating a multi-front risk environment in which domestic instability could intersect with regional conflict dynamics, amplifying threats to energy markets and regional security.

Summary

Widespread protests have been taking place across Iran since 28 December 2025, driven by acute economic hardship, soaring inflation, and the rapid collapse of the Iranian rial, which has severely eroded purchasing power and disrupted daily commerce. The current unrest began with strikes and shops closures in Tehran's Grand Bazaar before quickly expanding into a nationwide movement, spreading to more than 110 cities and provinces and drawing participation from shopkeepers, workers, youth, and other social groups. The immediate economic triggers have expanded to include more wide-ranging grievances with the Iranian government, and in some cases have included calls for the dissolution of the regime. The state response has exposed internal tensions, with senior officials alternating between warnings of severe crackdowns and public calls to distinguish peaceful protesters from "rioters".

Impacts

- **Strikes and commercial closures have been recorded across Iran.** Shops and markets across Tehran's Grand Bazaar and in several other cities, including Tabriz, Rasht, Shiraz, Qazvin, and Bandar Abbas have shuttered as merchants and workers participate in coordinated strikes, effectively paralyzing commerce and trade in key economic hubs. Retail traders and bazaar merchants have emerged as central actors, shuttering businesses and organizing strikes in protest against deepening economic pressure and perceived government mismanagement. A [strike](#) called by Kurdish opposition parties in neighboring Iraq for 08 January has reportedly been well-observed.
- **Authorities have taken increasingly aggressive measures to suppress demonstrations.** While the government's initial response to the protests were measured and emphasized the economic concerns of the demonstrators, calling them "[legitimate](#)," rhetoric has since [hardened](#), mirroring a more aggressive security posture. The Human Rights Activists News Agency (HRANA), which has provided accurate reporting on past demonstrations, said that as of [07 January](#), 38 people had died, including four security personnel. Authorities have deployed police, Basij (a paramilitary volunteer force), and riot units across market districts and major urban corridors to restrict protester movement. These measures coincided with clashes in commercial areas, where security forces used tear gas and crowd-control tactics against demonstrators, resulting in over [2,000 reported arrests](#), additional disruptions to business activity, and heightened volatility in economic hubs.
- **Internet outages have been reported across Iran.** On 08 January, internet connectivity monitor [Netblocks](#) noted a nationwide internet blackout in Iran. This follows days of scattered internet disruptions. Further outages are likely as authorities attempt to disrupt further organizing and demonstrations.
- **The ongoing demonstrations have prompted threats of intervention by Israel and the United States.** US President Donald Trump has [threatened](#) to intervene if Iranian security forces kill peaceful demonstrators. Israeli Prime Minister Benjamin Netanyahu has also [warned](#) Tehran of "severe consequences" if it attacks Israel, and has [reportedly](#) discussed the possibility of launching additional strikes on Iran with Trump. Meanwhile, Iran has sharpened its rhetoric against both Israel and the US, saying that it's [ready to fight back](#) if struck again and accusing "rioters" of [collaborating](#) with outside actors to destabilize the country.

Outlook

The current unrest could see economic paralysis, sustained strikes, and aggressive security responses erode the regime's internal legitimacy. Prolonged nationwide business closures and spill-over into strategic sectors such as energy raise the risk of a deeper regional fiscal crisis, while continued violence and mass arrests are likely to stoke further public anger. This internal fragility coincides with heightened external pressure: ongoing tensions with Israel and increasingly explicit US warnings of military consequences expose the regime to vulnerability on several fronts.

In this context, any escalation could compound domestic instability, strain security forces, and further accelerate economic isolation. While the prospects for regime change remain uncertain, the convergence of internal unrest and external threats significantly raises the risk of a prolonged political disturbance and a broader regional crisis,

with downstream impacts on global energy markets, international shipping, and other aspects of trade.

Related Sources

[US Central Command](#)