



IRAN'S ATTACKS ON THE GCC

(28 February-31 March 2026)

One month since the start of the Iran War, sustained Iranian attacks on the Gulf Cooperation Council (GCC) countries highlight a shift towards multi-domain warfare with major global economic and security implications.

SNAPSHOT OF IRAN'S ATTACKS

5,120+

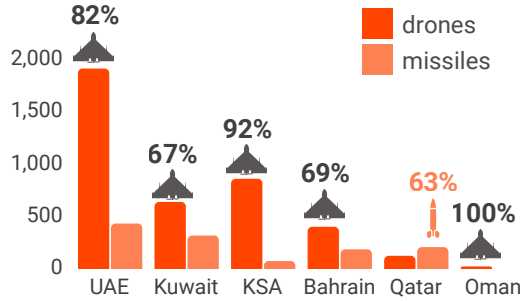
drones and missiles in total targeting the GCC since 28 February

77%
one-way attack drones (Shaheds)

23%
missiles (ballistic & cruise)

300+ casualties as a result of Iran's attacks

DRONES DOMINATE ATTACKS IN MOST GCC COUNTRIES



(calculations based on GCC countries' official reporting, estimates)

SPIKE IN CYBER ATTACKS

Iran-linked groups target critical infrastructure across the GCC

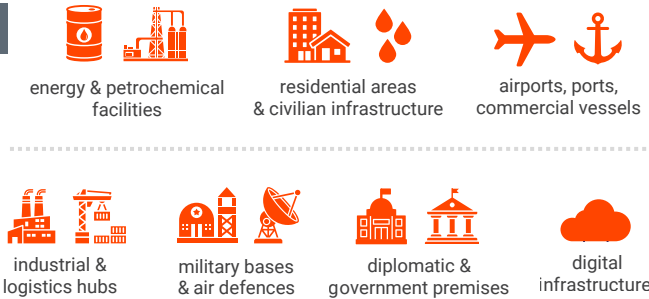
cyber-attacks against the UAE doubled to **530,000/day**

Main sectors targeted: finance, government, energy

(Wired Middle East, 26 March)

MAINLY CIVILIAN TARGETS

Attacks on civilian and economic infrastructure aim to weaken GCC economies and maximise global disruption.



INTERNAL DESTABILISATION FOILED

Bahrain, Kuwait, Qatar, and the UAE dismantled several IRGC- and Hezbollah-linked terror cells

Kuwait foiled a terror plot to assassinate state officials

Qatar and Saudi Arabia expelled Iranian military and defence attachés

GLOBAL ECONOMIC IMPACT

Beyond energy, GCC countries produce critical inputs for industry and agriculture, and are international investors and key hubs for logistics, travel and global supply chains.

Energy price surge & volatility

Trade & shipping disruption

Transport & tourism disruption

Rising industrial & food production costs

Investment shifts & reduced capital flows

KEY COMMODITIES AFFECTED

(IEA, USGS)

OIL & GAS

25% oil, **19%** LNG

- GCC exporters declared force majeure
- Qatar's LNG capacity ↓ 17% for ≤5 years

FERTILISERS

20% global fertiliser exports, **30%** urea, **20%** ammonia

- agriculture, food production

ALUMINIUM

8% global supply, UAE, Bahrain, construction, automotive

HELIUM

33% global supply, Qatar, aerospace, semi-conductors, MRI imaging

EU EXPOSURE (IMPORTS FROM THE GCC)

(Eurostat, quantity of imports)

35% refined fuels, **18%** aluminum (unwrought), **15%** helium, **11%** LNG, **10%** organic chemicals

Economic targeting

- disruption across energy, industry, logistics, finance
- critical chokepoints leveraged (Strait of Hormuz)
- price shocks transmitted globally



Drone-centric warfare

- high-volume, low-cost attacks
- overwhelm traditional air defence
- cost asymmetry favours attacker



Partnerships realignment

- GCC reliance on external security guarantees
- defence partnerships diversifying
- deepening defence ties with Ukraine (drones)



Covert operations

- activation of Iran's cells and proxies worldwide (incl. in EU and GCC)
- terrorism, espionage
- ↑ internal threat levels



AI-enabled cyberattacks

- increasing use of automated cyberattacks
- faster, harder to attribute
- cyber warfare scaling rapidly





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ABOUT

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EGIC also provides information services to organisations and individuals that seek to deepen their understanding of the trends unfolding in both Europe and the Gulf. EGIC is a firm believer in breaking paywalls and provides open access information – infographics, articles, reports (etc) – to the interested public. Finally, EGIC organises a wide assortment of events ranging from conference and seminars to workshops, art exhibitions, travels and specialised training.



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