

TREADSTONE 71

STRATEGIC & CYBER INTELLIGENCE · COGNITIVE WARFARE · INFLUENCE OPERATIONS

IRANIAN COERCIVE-THREAT MESSAGING AGAINST THE GULF COOPERATION COUNCIL

A Primary-Source Influence-Operations Assessment

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Contents

0. Reader's Guide, Scope, and Boundary 4
0.1 The governing boundary 4
0.2 Source tiering (strict, never blended) 4
0.3 Confidence bands 4
1. TL;DR 5
2. Bottom Line Up Front 5
3. Key Judgments 5
4. The Situation in Brief 6
5. Trigger, Context, and Baseline 7
6. The Threat on the Record 8
7. Reception and Effect 9
7.1 The market 9
7.2 The White House 10
8. Command Relationship and Coordination 10
9. The Gulf Answer, State by State 11
10. The Delivery Shift: Proxies and the Sea 12
10.1 The Houthi campaign on Saudi Arabia 12
10.2 Launches from Iraq 13
10.3 The maritime campaign 13
11. Negative Space: What Iran Does Not Do 13
12. Attribution: Organ, Amplifier, and Frame 14
13. Iranian Influence-Operation Tradecraft 14
13.1 Delegitimization by proxy 14
13.2 Legal laundering and the manufactured predicate 15
13.3 Deniability by construction 15
13.4 The technocratic wrapper 15
13.5 Managed disorder and reflexive control 15
13.6 The reciprocity frame 15
14. The Coercive-Signaling Model 15
15. The Telegram Amplification Layer 16
16. Threat-Credibility Assessment 17
17. Advanced Structured Analytic Techniques Applied 18
17.1 STEMPLES Plus environmental scan 18
17.2 ATCRI threat calibration 18
17.3 Analysis of Competing Hypotheses: why Iran threatens Gulf infrastructure 19
18. Evidence Grading Under the ASA Evidence Standard 20

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18.1 Source reliability: definitions 20
18.2 Information credibility: definitions 20
18.3 Sources graded 20
18.4 Claims graded 21
19. Futures and Indicators 21
19.1 Escalation and de-escalation tripwires 23
20. Actions 23
21. Intelligence Gaps, Caveats, and Corrections 24
21.1 Intelligence gaps and collection requirements 24
21.2 Caveats 25
21. Sources 25
21.1 Iranian official and state-aligned 25
21.2 Arabic and Gulf 25
21.3 Wire, market, and analytic 26
22. Wrap-Up 27

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0. Reader's Guide, Scope, and Boundary

Treadstone 71 reads Iranian coercive-threat messaging aimed at the six states of the Gulf Cooperation Council as an influence operation with a kinetic backstop. The product is written for Gulf and allied officials, for operators of power, water, fuel, aviation, subsea-cable and data-centre assets in the Gulf, for shipping and war-risk underwriters, for employers with staff in the region, and for the communicators who answer Iranian narratives. Section 20 gives each group its actions and the trigger for each.

0.1 The governing boundary

One boundary governs the whole product. Every target list, coordinate, or facility name in Iranian messaging is treated strictly as a messaging artifact to attribute and dissect. Coordinates are never validated, geolocated, or reproduced. No facility is ranked by vulnerability or disruption value. Strike feasibility, munitions, and sequencing stay out of scope. The intelligence sits in the words, the sourcing, and the tradecraft.

0.2 Source tiering (strict, never blended)

Tier	Definition	Weight
T1	Iranian official and state voices: government sites and spokesmen, IRGC and armed-forces statements, state broadcaster IRIB and its Press TV service	Load-bearing. Named speaker and dated statement
T2	Semi-official and state-aligned media and analytics: Tasnim, Fars, Mehr, Nour News, Defa Press, ISWNews	Corroborative. Agenda-driven, traceable
T3	Wire services, Gulf and international press, think tanks, vendors, opposition outlets	Corroboration and leads. Graded case by case

Source reliability and information credibility are graded on separate tables under the ASA Evidence Standard (Public Edition 1.2, DOI 10.5281/zenodo.23137881), which keeps the Admiralty axes apart and never averages them. Estimative language follows the Sherman Kent spectrum with half-open intervals. Verified facts and adversary claims never share a sentence.

0.3 Confidence bands

Band	Probability (percent)
Almost certain	95 to 99
Highly likely	85 to <95
Likely	55 to <85
Roughly even chance	45 to <55
Unlikely	15 to <45
Highly unlikely	5 to <15
Almost no chance	1 to <5

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1. TL;DR

TL;DR

Iran threatens Gulf energy, water, power and digital infrastructure to deter a further US campaign and to pry the Gulf away from Washington. In August the threat looked spent. Attacks at sea and Houthi fire on Saudi Arabia, which Iran arms and exploits, re-armed it, and Brent sits near $115. The next trigger is a large-scale US strike, a roughly even chance before 31 January 2027. Gulf operators should complete the Section 20 preparations now and tie further steps to the Section 19.1 tripwires.

2. Bottom Line Up Front

Iran runs a coercive-signaling campaign against the GCC through coordinated state offices. Named officials threaten the region's oil, power, water and, since October, its data centres, subsea cables and AI facilities, each threat conditioned on a new US attack on Iran. The demand underneath has not moved: close the US bases on Gulf soil and end Gulf intelligence-sharing with the US. Highly likely (85 to <95) on the demand; Likely (55 to <85) that deterring a further US campaign is the primary aim.

The second edition judged the signal to be decaying. Treadstone 71 withdraws that judgment. Words alone lost force over the summer: Brent hovered near $80 on 5 August as the warning broke. Backed by action, they regained it. Between 30 August and 27 October the US resumed strikes on Iran, ship attacks around Hormuz hit a record, and the Houthis struck Saudi airports and energy sites. Brent rose from $83.55 on 7 August to a 23 October settlement of $116.72. Likely (55 to <85) that the risk premium follows demonstrated action rather than statements.

The decision window runs from the 3 November midterms to at least 31 January 2027. President Trump has raised "another little" Epic Fury, and the IRGC has declared an offensive doctrine. Roughly even chance (45 to <55), at the low edge of the band, that the US opens a further large-scale campaign on Iran before 31 January 2027. If it does, Likely (55 to <85) that Iran itself strikes civilian infrastructure on GCC soil within 14 days, as it did after each US round in 2026: within two days of 28 February, nine days of 8 July and three days of 30 August.

For Gulf utility, cable, data-centre, aviation and shipping operators, and for companies whose people work in Saudi Arabia, the implication is to finish contingency preparations now rather than wait for a strike order.

3. Key Judgments

KJ-1. The demand is fixed. Tehran wants American forces out of their Gulf bases and Gulf intelligence cut off from Washington. Reuters reported the demand on 5 August, and Supreme Leader Mojtaba Khamenei voiced it in March. Highly likely (85 to <95).

KJ-2. Deterrence first, wedge second. The campaign's primary aim is to deter a further US campaign; splitting the Gulf from Washington is the secondary aim. Section 17.3's ACH supports that order but cannot exclude domestic signaling. Likely (55 to <85).

KJ-3. Coordinated across state offices. Four state offices sequenced a legal frame, a new target class, an offensive doctrine and a sea-denial claim in thirteen weeks without contradicting one another. Rivalry

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between IRGC commanders and the Pezeshkian government, which received Saudi envoys on 26 October, remains a live alternative. Likely (55 to <85).

KJ-4. Re-armed by action. The risk premium tracks demonstrated action. Threats delivered without action added no visible premium in early August, when Brent stayed near $80 the day the Gulf warning ran; attacks on tankers, mines and Houthi fire lifted it to a six-month high in October. Likely (55 to <85).

KJ-5. Deniable by default. Likely (55 to <85) that, absent a large-scale US campaign, Iranian pressure on the Gulf stays mostly deniable through 31 January 2027: Houthi fire, launches from Iraq, mines and ship attacks. Limited direct incidents, such as the May Bubiyan clash and the August missiles the UAE reported, remain possible and do not by themselves mark a broad campaign. Each 2026 US round drew direct Iranian fire on Gulf soil within nine days.

KJ-6. The Houthis are enabled; direction is unproven. Highly likely (85 to <95) that Iran enables the Houthi campaign on Saudi Arabia with weapons and intelligence; Roughly even chance (45 to <55) that Tehran directs its targeting and timing. The Houthis fight their own war with Riyadh, and Tehran hosted Riyadh's defence minister while the strikes continued. If the Houthis act on their own, a US–Iran or Hormuz deal leaves the Houthi strikes on the kingdom untouched.

KJ-7. Digital assets are now named. Iran has put Gulf subsea cables and data centres on the record as conditional targets. Here an attack means a cable cut or data-centre outage that the operator or a government attributes to hostile action, kinetic or cyber; none is confirmed. Roughly even chance (45 to <55) of one within 30 days of a large-scale US campaign. Unlikely (15 to <45) before 31 January 2027 overall, about 36 percent on the Section 19 numbers. The window runs longer than the 14-day strike window because Iran has no 2026 record of cable attacks to set a pace.

KJ-8. The Gulf will not grant the demand. Highly likely (85 to <95) that no GCC state publicly closes US basing or ends intelligence-sharing before 31 January 2027. A partial concession is the live question: Unlikely (15 to <45) that at least one GCC state publicly restricts US use of its territory or airspace for strikes on Iran in that period. None has done so in eight months of war; Saudi Arabia is the likeliest candidate, given the Tehran visit and the Houthi pressure.

KJ-9. The political effect is real but partial. Likely (55 to <85) that Iranian threats, carried by Riyadh and Doha, contributed to the 2 August strike deferral. Roughly even chance (45 to <55) for the 18 May deferral, where the record shows the Gulf request but not an Iranian message. US domestic considerations, including fuel prices before the midterms, compete as an explanation for each.

4. The Situation in Brief

Question	Answer
Who	Iran's state voices: Foreign Ministry spokesman Esmaeil Baghaei; Supreme National Security Council Secretary Mohsen Rezaei (since 9 August); IRGC spokesman Hossein Mohebi; Armed Forces Chief of Staff Ali Abdollahi; Khatam al-Anbiya Central Headquarters spokesman Ebrahim Zolfaghari. State and semi-official media carry the line, and the Houthis and Iraqi militias deliver much of the fire.
What	A conditional threat campaign against Gulf civilian infrastructure, carried in Persian, Arabic and English and backed since February by strikes on Gulf sites, since August by attacks at sea, and by a Houthi campaign against Saudi Arabia that began at sea in July and peaked in October.

Question	Answer
So what	The threat carries price and policy weight. Brent gained $33 in eleven weeks as ship attacks, mines and Houthi strikes resumed. Gulf requests held off two US strike decisions. Owners of Gulf power, water, cable and data-centre assets face named threats to their asset class.
Who cares	Gulf governments; utilities and desalination operators; airport, cable and data-centre operators; shippers and war-risk underwriters, quoting Hormuz war-risk rates of 3 to 10 percent of hull value since the February strikes against about 0.25 percent before the war (Marsh); employers with staff in Saudi Arabia, where the US announced an ordered departure of non-emergency staff on 21 October; Western governments weighing new strikes; energy buyers in Asia and Europe.
Why now	A US strike window after the 3 November midterms, the IRGC's 21 October offensive doctrine, a record month of ship attacks, Houthi escalation against Saudi Arabia, Saudi, Pakistani and Turkish envoys in Tehran on 26 October, and Qatar's 27 October demand that Iran stop threatening Gulf states.
Impacts so far	Extensive damage at Qatar's Ras Laffan on 18 March; four days of strikes on Kuwaiti power and water plants in July and public electricity rationing; a drone hit on the Barakah nuclear plant's external generator on 17 May; at least 12 killed, a 13th later, and at least 309 wounded at Riyadh's King Khalid International Airport on 10 October; a UAE suspension of all trade with Iran on 19 August; an Aramco order to evacuate its Dhahran headquarters on 22 October; a fire near the Ras Tanura export terminal on 27 October, reported after a claimed Houthi missile strike that Riyadh has not confirmed.

5. Trigger, Context, and Baseline

The war opened on 28 February 2026 with US and Israeli strikes on Iran, named Operation Epic Fury by the Pentagon. Iran struck Gulf states the same day, hitting the US Fifth Fleet headquarters in Bahrain; drones hit Oman's Duqm port on 1 March. Brent closed at $72.48 on 27 February and $81.49 on 3 March. Qatar halted LNG output after Iranian drones hit Ras Laffan and Mesaieed in early March. March set the template. On 11 March Reuters carried the Khatam al-Anbiya spokesman's warning to get ready for $200 oil. A week later, on 18 March, Iran named specific Qatari, Saudi and Emirati energy facilities and then hit Ras Laffan. Brent futures first settled above $100 on 12 March. A Pakistan-brokered ceasefire on 8 April cut Brent 13 percent in a day, to $94.75. Brent futures hit their war-period high on 30 April, at about $126 intraday.

Calm held into June. The Islamabad Memorandum of 17 June opened a 60-day negotiating window. Fighting resumed on 8 July and the US re-imposed its naval blockade on 14 July. From 17 to 20 July Iran hit Kuwaiti power and water plants on four straight days. On 22 and 23 July the Houthis claimed attacks on Saudi tankers near Bab el-Mandeb and declared a blockade of Saudi oil shipments, and Brent settled at $100.69 on 23 July. Five days later President Trump threatened Iran's energy network, and he had called off the strike by 2 August, subject to a rapid deal, and named requests from Saudi Arabia, the UAE and Qatar.

The second edition closed on that pause. What followed broke its central finding. The 60-day window lapsed on 17 August without a deal. On 19 August the UAE cut all trade with Iran. US strikes on Iran resumed on 30 August. Iran answered with drones on Kuwait and Bahrain within three days, and the two sides traded fire in Hormuz through 4 September. Trump rejected Iran's seven-day Hormuz plan on 26 September. October brought the deadliest Houthi strikes on Saudi Arabia, the cable and data-centre threats, and a record month of ship attacks.

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Figure 1. Threat, strike and diplomacy cadence, 28 February to 27 October 2026. Filled squares mark strikes on GCC soil; the open square marks a claimed, unconfirmed strike; circles mark Iranian threat messages; triangles mark US action or threats; diamonds mark diplomacy or Gulf countermoves.

6. The Threat on the Record

The campaign speaks through named officials. Several Persian originals sit on Iranian sites that block automated retrieval, so the quotations below use official English renderings and wire translations, each dated and sourced. Arabic appears where the Arabic text was captured directly.

> *"Get ready for oil to be $200 a barrel, because the oil price depends on regional security, which you have destabilized."*
>
> Ebrahim Zolfaghari, spokesman, Khatam al-Anbiya Central Headquarters, as reported by Reuters, 11 March 2026

> *"Fuel, energy and natural gas infrastructure of the source of the invasion will be set ablaze and reduced to ashes."*
>
> Ebrahim Zolfaghari, via Press TV, 18 March 2026

> *"The CENTCOM commander has explicitly stated that the UAE, Bahrain, Qatar, Kuwait, Saudi Arabia, and Jordan have participated in US military operations against Iran. If this US claim is false, the aforementioned states should officially and transparently refute it."*
>
> Esmaeil Baghaei, Foreign Ministry spokesman, post on X, 23 July 2026, as carried by CGTN and Mehr

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“By providing their territory as a staging ground to facilitate American aggression against Iran, these states are themselves committing an act of aggression under UN General Assembly Resolution 3314 (Definition of Aggression).”

Esmaeil Baghaei, same statement, as carried by CGTN

«كان التحذير الإيراني لا لبس فيه: إذا اســتهدفت الولايات المتحدة البنية التحتية الإيرانية، فســترد طهران بضــرب منشآت الطاقة في الخليج»

“The Iranian warning was unequivocal: if the United States targets Iranian infrastructure, Tehran will respond by striking energy facilities in the Gulf.”

Gulf source to Reuters, 5 August 2026; Arabic text as published by Annahar

«إغراق الخليج في الظلام، دولةً تلو الأخرى»

“Iran threatened to black out the Gulf, country by country, if Trump attacked its power plants.”

Gulf official to AFP, 6 August 2026; Arabic rendering, Euronews Arabic

“many cables, data centers and artificial intelligence facilities, valued at $2 trillion”

Mohsen Rezaei, Secretary, Supreme National Security Council, Iranian state media, as reported by Iran International, 12 October 2026

“Seven major internet cables run beneath the Strait of Hormuz.”

Hossein Mohebi, IRGC spokesman, via IRIB, 19 October 2026

“If Iran is attacked, there will be no more red lines ... from undersea cables to military bases, including covert ones.”

Senior Iranian security official to Reuters, 23 October 2026. Reuters reported that Iran intends to block repairs to prolong the disruption

“Now we say that if a country attacks us, we will both respond and launch an offensive.”

Hossein Mohebi, IRGC spokesman, 21 October 2026, via Al Jazeera

“The US president should only dream of his military personnel and armed forces entering the Persian Gulf again.”

Ali Abdollahi, Chief of Staff of the Armed Forces, via Tasnim, 24 October 2026

Behind the threat sits the demand. Reuters reported on 5 August that Iran’s clerical leadership has repeatedly called for the closure of US bases in the Gulf and for Gulf Arab states to stop sharing intelligence with Washington. Supreme Leader Mojtaba Khamenei warned Gulf states in March to shut the bases. The infrastructure threat is the lever; the bases are the price.

7. Reception and Effect

A threat campaign is measured by effect, not volume. Two audiences matter most: the oil market, which prices risk to Gulf supply, and the White House, which decides on strikes. The answers differ, and each changed after August.

7.1 The market

In early August the warnings bought nothing. A Houthi tanker attack had pushed the price past $100 in late July. Once Trump called off his strike, the price fell below $80 on 4 August and stayed near that level on 5

August, the day Reuters carried the Gulf warning. The week of 7 August ended at $83.55 even as Iran warned of a Gulf blackout. Traders priced the talk of a Hormuz deal and discounted the threat. Then the action came back. Brent closed at $93.73 on 20 August after the UAE trade cut-off and new US sanctions pledges. The 30 August strikes and Iran's answer took the price back above $100, to a $107.82 settlement on 14 September. After a dip below $100 late in September, tanker attacks pushed it over again in early October, and the 23 October session closed at $116.72 after Houthi strikes across Saudi Arabia and Aramco's order to evacuate its Dhahran headquarters. The price eased to $115.81 on 26 October as envoys met in Tehran. Bank of America's commodities head said $120 is likely on average over the coming months if Iran resumes attacks on regional infrastructure.

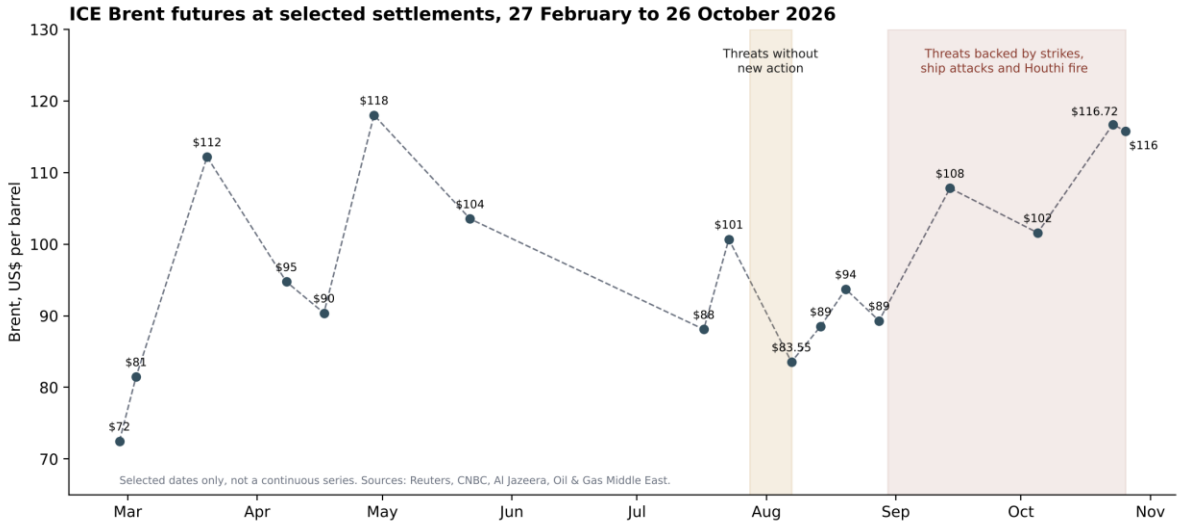


Figure 2. ICE Brent futures at selected settlements. The August threat cluster met a falling price; the October rise tracked ship attacks, mines and Houthi strikes.

Repetition explains the summer. A repeated threat teaches the audience that words and action are different things, and the premium drains. Action closes that gap at once. Each strike, mine or ship attack converts the standing threat back into a priced risk.

7.2 The White House

The political audience tells a different story. On 18 May Trump postponed a planned strike at the request of the Qatari emir, the Saudi crown prince and the UAE president. Eleven weeks later he stood down again: a 1 August post called off the strike, and on 2 August he named Saudi, Emirati and Qatari requests. Reuters reported that Iran's warning had been conveyed primarily through Saudi Arabia and Qatar, and a Gulf official told AFP the message was "very serious." Gulf capitals carried the cost of the threat to Washington and asked for restraint. Likely (55 to <85) that the threat contributed to the August deferral and Roughly even chance (45 to <55) for May (KJ-9), with Washington's own worry over pump prices ahead of the vote as a rival explanation.

The limit is also visible. Neither deferral produced a deal, and the US was bombing Iran again by 30 August. The threat buys time; the bases stay open.

8. Command Relationship and Coordination

One state voice speaks through several offices. Baghaei built the legal frame in July. Rezaei, named on 9 August to run the Supreme National Security Council with the Supreme Leader's endorsement, named the digital

target class in October. Mohebi announced the offensive doctrine. Abdollahi said US forces will not re-enter the Persian Gulf. The four offices sequence rather than contradict one another. Divergent signals, such as the 21 October doctrine and the reception of the Saudi defence minister on 26 October, fit factional competition between the IRGC and the government as well as a designed good-cop, bad-cop routine. Treadstone 71 judges coordination more likely because the moves build on one another, but rivalry stays open.

The predicate move remains the tell. After a video in which CENTCOM commander Adm. Brad Cooper described Gulf partners as participants in the campaign, Baghaei listed five GCC members and Jordan and demanded they refute the claim. He then argued that by hosting US forces they had committed aggression under Resolution 3314. Silence became consent inside the frame. Oman was not on his list.

> **Why the defender should care**
>
> State direction changes the counter-move. Exposing an outlet blunts a freelance product. A coordinated campaign is thinnest at the seam between official threat and deniable delivery. Attribute each threat to the named office and speaker, attribute each proxy strike to its launcher, and put the two side by side in public.

9. The Gulf Answer, State by State

The Gulf answer is primary evidence, and it runs against the Iranian frame. No state has granted the demand. The postures have split into three, and the split matters more than the shared refusal.

State	Posture	On the record
Saudi Arabia	Deterrence, then mediation under fire	Foreign Minister Prince Faisal bin Farhan said on 18 March that “what little trust there was before has completely been shattered” and reserved the right to military action. Riyadh expelled Iran’s military attaché in March. The kingdom absorbs the Houthi campaign, including the 10 October airport strike. Egypt’s National Defense Council pledged “all possible forms of support” to Saudi security on 18 October, and its parliament authorised military support on 26 October. Defence Minister Prince Khalid bin Salman met President Pezeshkian in Tehran on 26 October under the Makkah pact with Turkey and Pakistan, “to encourage dialogue and diplomatic solutions.”
Qatar	Condemn, expel, mediate	Condemned the 18 March strike on Ras Laffan as a “dangerous escalation” and declared Iran’s military and security attachés persona non grata. Carried Iran’s seven-day Hormuz plan in September. On 27 October the Foreign Ministry said Iran must show good intentions for mediation to succeed, stop threatening Gulf states and reopen the Strait of Hormuz; the emir met President Pezeshkian in Moscow the same day.
Kuwait	Absorb and ration	A strike on 30 March hit a service building at a power and desalination plant and killed an Indian worker. From 17 to 20 July Iran hit several power and water plants; the government asked the public to cut consumption and reported use below projected levels. IRGC infiltrators clashed with Kuwaiti forces on Bubiyan Island in May.
UAE	Harden, then confront	Opened the Emirates Monitoring Centre on 9 July, linking its four electricity and water utilities in real time. EGA restarted the Al Taweelah alumina refinery the next day, after a 28 March drone strike. Attributed the 17 May Barakah drones to launches from Iraq. On 19 August suspended all trade,

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State	Posture	On the record
		commercial exchanges and financial transactions with Iran "until further notice," after reporting two Iranian ballistic missiles that Tehran denied firing.
Bahrain	Host and absorb	Hosts the US Fifth Fleet, whose headquarters was struck on 28 February. Missile debris killed a shipyard worker at Salman port on 2 March. The US Navy has since moved sustainment to alternate hubs (Department of Defense Inspector General, September).
Oman	Broker, struck early	Iranian drones hit Duqm port on 1 March, the first attack on the sultanate, and Salalah within days. Oman stayed off the Cooper complicity list and the August Fars catalogue. Iran and Oman announced a temporary Hormuz route on 26 August; Iran said the strait stays closed until the US meets its June commitments, and the route was not implemented.

Each posture has its logic. Abu Dhabi, struck at Barakah and targeted at sea, cut its economic tie and bet on hardening. Riyadh, under Houthi fire, sent its defence minister to Tehran. Doha mediates and presses Tehran in public. Muscat keeps the channel. Iran gains from the spread and has not converted it into the demand.

10. The Delivery Shift: Proxies and the Sea

The threat now arrives mostly through others and at sea. Deniable delivery keeps Iran below the threshold that unites the Gulf behind a US campaign, while the cost lands on Gulf capitals. UN Security Council Panel of Experts reports on Yemen have documented Iranian-origin missile and drone components in Houthi hands for years. Whether Tehran also sets Houthi targets is unproven (KJ-6).

10.1 The Houthi campaign on Saudi Arabia

The Houthi war on Saudi Arabia reignited in July with a declared blockade and Red Sea tanker attacks. A Houthi strike that month shut the Jizan refinery for repairs into mid-August (Industrial Info Resources, via Reuters). In September they seized stretches of Red Sea coastline, which Saudi-backed government forces retook in part in October. Houthi strikes on the Abha and Riyadh airports on 6 and 7 October killed three foreign nationals and wounded 36, per Saudi aviation authorities. Three days later a Houthi strike on Riyadh's King Khalid International Airport killed at least 12 people, among them a US citizen, and wounded at least 309, per Saudi aviation authorities; CBS later reported a 13th death. The Saudi-led coalition called it a "full-fledged war crime." Washington announced an ordered departure of non-emergency staff and families from Saudi Arabia on 21 October, effective 23 October.

Houthi spokesmen claimed further attacks on airports and oil facilities across the kingdom from 24 to 26 October. On 27 October Houthi military spokesman Yahya Saree claimed ballistic-missile strikes on the Ras Tanura refinery and on the Defence Ministry in Riyadh. Saudi authorities said they destroyed two missiles fired at the capital and three aimed at the Eastern Province, and shrapnel damaged a building in Riyadh. Bloomberg reported a fire near the Ras Tanura export terminal, later contained. Riyadh has not confirmed a hit on the refinery, the kingdom's largest, and the maritime security firm Vanguard said the extent of damage and any effect on loadings remained unclear. A March drone attack blamed on Iran had already forced a partial shutdown there (AFP). The coalition said the Eastern Province missiles caused no casualties, and Saudi Civil Defence reported none in Riyadh; a day earlier the coalition said it destroyed four Houthi launchers and five

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missile-storage tunnels in Yemen. Egypt's parliament authorised the military on 26 October to help defend Saudi Arabia if asked, and Houthi politburo member Mohammed Ali al-Houthi called the vote a declaration of war. Saudi or Aramco confirmation of lost loadings at Ras Tanura trips the fourth escalation indicator in Section 19.1.

10.2 Launches from Iraq

On 17 May one of three drones hit an electrical generator outside the inner perimeter of the UAE's Barakah nuclear plant. Abu Dhabi's Ministry of Defence attributed all three to launches from Iraqi territory on 19 May. IAEA leadership voiced "grave concern." Launching from Iraq gave Tehran distance; the target carried the message.

10.3 The maritime campaign

The Washington Institute recorded 28 attacks on ships in and around the Strait of Hormuz in October, the most on record. IMO records show 120 incidents since the conflict began; UKMTO counted 135 conflict-related incidents as of 16 October and warns of under-reporting. On 22 October the IRGC said seven tankers were attacked or hit mines overnight. Five days later Iran's navy said a tanker running dark hit mines and caught fire, and said the strait remains closed and unsafe for vessels it deems violators.

Transit counts conflict, and the conflict has a cause. Windward counted 14 crossings on 21 October. Lloyd's List Intelligence averaged about 12 a day in late August, Kpler about 13, and US officials said 40 ships were escorted on 1 September alone, a claimed record. Before the war roughly 100 ships crossed daily. Counts differ by vessel definition, by the share of dark transits, and by data lag. Middle East crude flows have recovered close to pre-war levels by some estimates even as hull counts stay low. Price risk off at least two providers and treat any single count as partial. Insurance tells the cost. Marsh put Hormuz war-risk rates at 3 to 10 percent of hull value within weeks of the February strikes, against about 0.25 percent before the war; market estimates in late August ran 3 to 8 percent. At 10 percent, a single transit by a $150 million tanker costs about $15 million in cover.

11. Negative Space: What Iran Does Not Do

What an actor declines to do often carries the intent. Three absences stand out.

Oman is the first. Iran struck Omani ports early in the war, then left Oman off every list that mattered politically. Baghaei's complicity list omitted it. The August Fars catalogue covered Saudi Arabia, the UAE, Qatar, Kuwait and Bahrain, and not Oman. Tehran negotiates Hormuz routes with Muscat. The threat map and the mediation map remain mirror images.

Ownership is the second. Tehran has not claimed the 10 October airport attack, and it hosted the Saudi defence minister sixteen days later. Baghaei denied the August missile launch toward the UAE. In March the joint headquarters blamed Israel for the strike on Kuwait's desalination plant. Iran keeps the coercive value and refuses the bill.

The third is specificity. In March Iran named individual Gulf facilities and then struck one, so the named-facility indicator has fired before and was followed by action. Since August, on-record officials name asset classes rather than sites: cables, data centres, artificial-intelligence facilities, airports, pipelines. The first return to a named site paired with a deadline is the escalation indicator to watch.

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12. Attribution: Organ, Amplifier, and Frame

Attribution keeps the analysis from becoming a rumor mill. Formal state organs carry the threats. Directed outlets carry catalogues and framing. Proxies carry the fire. Wires carry the reach.

Category	Actors	What it carries	Reliability
Formal state organs	MFA spokesman; SNSC secretary; IRGC spokesman; Armed Forces General Staff; Khatam al-Anbiya HQ; IRNA; IRIB and Press TV	Official, attributable threats and legal framing	B
Directed outlets	Tasnim, Fars, Mehr, Nour News, Defa Press	Target catalogues, delegitimization, unnamed-source lines	C
Advocacy analytics	ISWNews / Islamic World News	Maps and framing that track the state line	D
Proxy voices	Houthi military and media offices; Iraqi militia Telegram networks	Strike claims, often unconfirmed by the target state	D
Wires and Gulf press	Reuters, AFP, Al Jazeera, Gulf state agencies and dailies	The warnings, the damage record, Gulf responses	A to B

13. Iranian Influence-Operation Tradecraft

The messaging draws on a mature repertoire. Each move below carries a verified 2026 example. Logged together, the moves form a signature that flags the next pulse before its content lands.

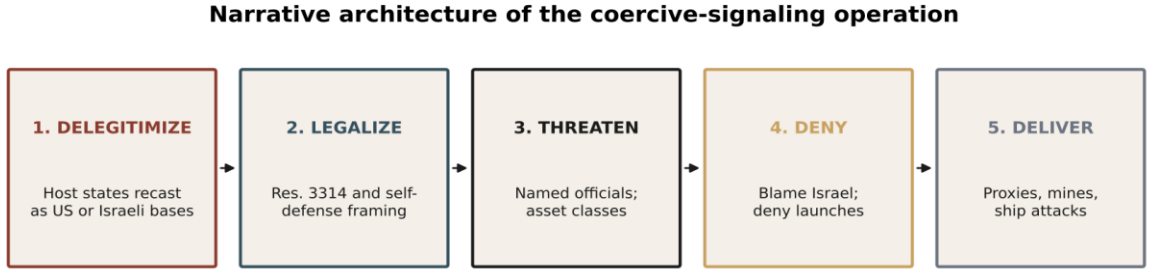


Figure 3. Narrative architecture. Each stage does a distinct job, and the sequence launders a threat against civilian power and water into a claim of lawful self-defense.

13.1 Delegitimization by proxy

The first move strips the host state of independent standing. Baghaei recast six host governments as co-belligerents in July. The UAE draws the sharpest version: after the 2020 normalization with Israel, the ultraconservative daily Kayhan wrote that the UAE was set to become “a legitimate and easy target for the resistance,” and in May 2026 the IRGC warned Abu Dhabi against turning its territory into a “den of Zionists,” as reported by Madhyamam. Reattached to the enemy, a sovereign state’s water and power read as fair game inside the frame.

13.2 Legal laundering and the manufactured predicate

The second move borrows international law. Baghaei turned a US commander's remark into a demand that Gulf states disprove their own guilt, then cited Resolution 3314 and Article 2(4) of the UN Charter. The threat did not change. A legal argument was built around it for Western lawyers and for Gulf publics looking for a reason to doubt their governments.

13.3 Deniability by construction

The third move keeps a hand free. Semi-official outlets and proxy channels carry the most aggressive content. When a strike draws condemnation, the apparatus denies or blames Israel. In October the fire on Saudi Arabia came from Yemen while Tehran hosted Riyadh's envoy, a pattern that fits deniable direction and Houthi autonomy alike.

13.4 The technocratic wrapper

The fourth move borrows the authority of data. Fars, in its August catalogue, presented Gulf energy assets as sites "within range" of precision missiles. Rezaei priced the regional digital estate at $2 trillion. Numbers turn intimidation into a briefing and invite the reader to do the threatening arithmetic.

13.5 Managed disorder and reflexive control

The fifth move keeps the adversary reacting to Tehran's tempo. A "Persian Gulf Strait Authority" announces permission regimes and says it will take legal action against vessels of South Korea's Sinokor from 1 November. Iran declares the strait shut to vessels it deems hostile. Tehran wants decisions in Washington and in shipping offices shaped without the decisive shot.

13.6 The reciprocity frame

The sixth move claims moral symmetry. Strikes on Gulf energy are cast as an equal answer to strikes on Iranian energy, as in Zolfaghari's 18 March line, and the $200 oil warning carries the same promise to global markets. The October doctrine extends it: an attack on Iran now brings an offensive as well as a response.

> **Signature value**
>
> Coordinates in Iranian catalogues are public and confer no advantage. The reusable intelligence is the pattern: proxy delegitimization, the manufactured legal predicate, the deniability seam, the technocratic wrapper, the managed-disorder tempo and the reciprocity frame. Each recurs across products and dates the next pulse.

14. The Coercive-Signaling Model

Deterrence of Washington is the primary aim; compellence of the Gulf hosts is the secondary aim. Its logic is to change a decision in Washington by raising the expected cost to Washington's hosts, and to pry those hosts loose with the demand on bases and intelligence-sharing. Tehran offers two paths: a war that engulfs Gulf energy and the regional internet, or a negotiated exit. The Gulf states are the lever.

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One product serves four audiences. The home front hears deterrent pride. Houthi and Iraqi militia audiences hear a call to fire. Gulf publics hear fear and a hint that their rulers exposed them. Washington and the markets hear a price and an escalation warning.



Figure 4. Audience segmentation of a single threat product.

Reach is engineered through language. A Persian state claim moves to Arabic outlets within hours and then to a Western wire, where an anonymous Gulf source and an international byline turn a state assertion into reported fact. On 5 August the Reuters warning appeared in Arabic in the Lebanese daily Annahar the same day.

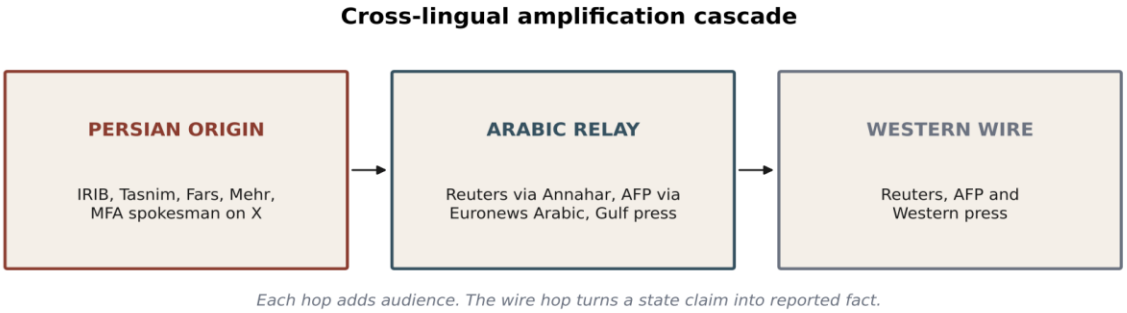


Figure 5. Cross-lingual amplification cascade.

15. The Telegram Amplification Layer

The middle hop runs on Telegram. Channels are named here to attribute and expose, never to aid access. Subscriber counts below were read from public channel pages on 27 October 2026 unless another source is shown. Separate reads that day returned different figures for several channels, so the table gives the observed range. Counts drift and channels rotate handles after takedowns.

Channel	Affiliation	Role	Subscribers, 27 Oct 2026
Tasnim News Agency	IRGC-affiliated semi-official	Origin organ	About 2.48M
Fars News Agency	Close to the IRGC	Origin organ; energy-site catalogue	1.71M to 1.85M

Channel	Affiliation	Role	Subscribers, 27 Oct 2026
Mehr News Agency	State-owned	Origin; most active official agency in the war's first 72 hours (Factnameh)	326K to 348K
Nour News	Close to the Supreme National Security Council	Semi-official signaling	218K to 232K
Defa Press	IRGC Sacred Defense outlet	Military threat content	93K to 114K
Press TV	IRIB English service	Western-facing mirror	About 93K
Islamic World News (ISWNews), English	Pro-IRGC analytics	Analytic mirror and framing	About 21K
Kata'ib Hizbullah network	Iraqi militia, IRGC-backed	Coordinated amplifier	22 channels, over 2 million subscriptions (MEMRI, 27 May 2026)

Coordination sits behind the Persian state tier. Factnameh examined 50,591 posts from the top 50 pro-state channels in the war's first 72 hours and found that 65.1 percent of 44,615 text posts ran more than 95 percent word-identical to another post. All 50 channels stayed active through the national internet shutdown that followed the 28 February strikes; in the January shutdown only a few had. Highly likely (85 to <95) that the Persian state tier operated under centralized message control in the war's opening days; current coordination has not been re-measured. Bots and synthetic media surge downstream, on open platforms. Cyabra found Iran-aligned content drew over 145 million views on X, Facebook, Instagram and TikTok between 28 February and 23 March, with TikTok carrying 72 percent. In its first-week sample, 19 percent of the accounts in the discourse were inauthentic; they generated over 37,000 posts and about 18 million potential views. The Telegram layer seeds that surge; open platforms carry it.

Enforcement has struck the ecosystem without dismantling it. The EU listed the IRGC as a terrorist organisation on 19 February. A Europol-led action across 19 countries, run from 13 February to 28 April and announced on 18 May, targeted more than 14,200 IRGC-linked posts, accounts and links. The EU extended its Iran sanctions framework to Hormuz interference on 22 May and made first listings on 8 June. Google's Q1 2026 influence-operations bulletin recorded nine Iran-linked YouTube takedowns, the largest of 61 channels. OpenAI disclosed on 8 October an Iran-origin operation, "Bogus Bylines," that used seven fake journalist personas to place almost 100 articles since July 2025, the recent ones on the war. The core state and militia nodes remain live.

> **Attribution boundary held**
>
> The layer is mapped to attribute and expose, never to access. No invite links, join steps or discovery instructions appear here. The reusable product is a behavioral signature: near-identical cross-posts across the state tier within minutes, and a Persian-to-Arabic-to-wire latency short enough to imply pre-positioning.

16. Threat-Credibility Assessment

Signaling works only when capability is plausible. Here it is proven. Iran and its proxies have hit Gulf energy, water, power, port, aviation and nuclear-adjacent sites in 2026, and the record is public. Gulf audiences have

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lived the threat. Limits remain. Demonstrated strikes caused outages and damage, not the grid collapse the messaging promises. Kuwait kept power on through four days of strikes by cutting demand. The UAE runs its grid from one national control room and restarted Al Taweelah in July. No Gulf subsea cable or data centre has been confirmed hit. Likely (55 to <85) that the coercive effect of the campaign exceeds any physical effect Iran imposes short of a large-scale war.

Intent turns on Washington. Iran's willingness to hit Gulf sites is shown. Whether it carries the conditional threat to the scale claimed depends on the size of any US campaign. Highly unlikely (5 to <15) that Iran opens a broad campaign against Gulf civilian infrastructure without a large-scale US strike first.

17. Advanced Structured Analytic Techniques Applied

17.1 STEMPLES Plus environmental scan

Factor	Reading
Social	Aimed at societies whose social contract rests on delivered water, power and services
Technical	Threat classes now include subsea cables and data centres; Gulf grids show redundancy and central control
Economic	Anchored on oil and LNG disruption and on war-risk cost; the premium tracks action
Military	Backed by direct Iranian strikes from February to early September and by proxy and maritime fire throughout
Political	Seeks to split GCC capitals from US posture; the ask is base closure and an end to intelligence-sharing
Legal	Resolution 3314 and self-defense framing pre-launder threats against civilian infrastructure; a "Strait Authority" claims legal powers over shipping
Educational / Religious	Quranic cadence and resistance-axis framing supply moral license
Security	Raises perceived risk for airlines, insurers and expatriate staff; the US announced ordered departures from Saudi Arabia on 21 October
Psychological / Information	The core domain: fear, delegitimization and fatalism delivered in a technocratic wrapper
Demographics / Geography	Coastal concentration of Gulf infrastructure and the Hormuz chokepoint magnify each threat
Time	Pulses track US decision points: 28 July, 2 August, late September, and the post-3 November window

17.2 ATCRI threat calibration

Axis	Assessment
Adversary	IRGC (spokesman, Navy, Aerospace Force under Brig. Gen. Majid Mousavi), Khatam al-Anbiya HQ, Armed Forces General Staff, SNSC, MFA, directed media, and proxy forces in Yemen and Iraq

Axis	Assessment
Tactics	Named-spokesman threats; catalogues; delegitimization; the legal predicate; deniable proxy delivery; mines and ship attacks; cross-lingual amplification
Capabilities	Demonstrated missile and drone reach across all six GCC states; maritime denial in and around Hormuz; proxy reach into Saudi Arabia and the UAE
Requirements	A believing audience, a live kinetic backdrop, and Gulf capitals willing to carry the warning to Washington; all three are present
Intentions	Coercion: deter a renewed US campaign, force base closure and an end to intelligence-sharing, and pry the Gulf from Washington

17.3 Analysis of Competing Hypotheses: why Iran threatens Gulf infrastructure

Four hypotheses were tested against nine items of evidence. CC is strongly consistent, C consistent, N neutral, I inconsistent, II strongly inconsistent. The method rewards evidence that splits hypotheses, not evidence that flatters one. H3 drew no discriminating evidence and stays untested; Section 21.1 lists the collection that tests it.

Evidence	H1 Deter a further US campaign	H2 Mask for a broad campaign regardless of US action	H3 Domestic regime signaling	H4 Split the GCC from the US
Threats conditioned on a new US attack	CC	I	N	C
Gulf leaders asked Trump to defer strikes (May, Aug)	CC	N	N	C
No broad campaign on GCC soil without a large US strike first	C	II	N	N
Demand to close bases and end intelligence-sharing	C	N	N	CC
Envoy diplomacy with Riyadh, Doha, Muscat	C	I	N	C
Proxy delivery and denial of ownership	C	I	N	C
Digital target class added in October, before the US window	CC	C	N	N
Offensive doctrine announced 21 October	C	C	C	N
UAE trade cut-off and no basing change	N	N	N	I
Inconsistency score (I = 1, II = 2)	0	5	0	1

Verdict. H1, deterrence of a further US campaign, fits best, with H4 as its secondary aim: Likely (55 to <85). H2 fails on the record of restraint between US rounds: Highly unlikely (5 to <15), matching Section 16. H3 explains tone, not targeting, and remains untested. H4 meets its strongest contrary evidence in Abu Dhabi, where pressure produced confrontation rather than distance.

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18. Evidence Grading Under the ASA Evidence Standard

Two axes, never averaged. Source reliability grades the source. Information credibility grades the claim. Definitions follow STANAG 2511, which the ASA Evidence Standard keeps as its entry anchor.

18.1 Source reliability: definitions

Grade	Label	Definition
A	Completely reliable	No doubt of authenticity, trustworthiness, or competency; a history of complete reliability
B	Usually reliable	Minor doubt about authenticity, trustworthiness, or competency; a history of valid information most of the time
C	Fairly reliable	Doubt of authenticity, trustworthiness, or competency, but has provided valid information in the past
D	Not usually reliable	Significant doubt about authenticity, trustworthiness, or competency, but has provided valid information in the past
E	Unreliable	Lacking in authenticity, trustworthiness, and competency; a history of invalid information
F	Reliability cannot be judged	No basis exists for evaluating the reliability of the source

18.2 Information credibility: definitions

Grade	Label	Definition
1	Confirmed by other sources	Confirmed by other independent sources; logical in itself; consistent with other information on the subject
2	Probably true	Not confirmed; logical in itself; consistent with other information on the subject
3	Possibly true	Not confirmed; reasonably logical in itself; agrees with some other information on the subject
4	Doubtful	Not confirmed; possible but not logical; no other information on the subject
5	Improbable	Not confirmed; not logical in itself; contradicted by other information on the subject
6	Truth cannot be judged	No basis exists for evaluating the validity of the information

18.3 Sources graded

Source	Grade	Basis
Reuters, AFP (named bylines, primary reporting)	A	Established wires; corroborated across outlets
EIA, Council of the EU, Europol, IAEA, OpenAI, Google TAG	A to B	Official or first-party disclosures

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Source	Grade	Basis
Gulf state agencies and ministries (WAM, Saudi MFA and GACA, Qatar MFA, Kuwait ministries)	B	Authoritative on their own losses; interested parties
Al Jazeera, Al-Monitor, The National, Khaleej Times, Arab News, CNBC	B	Established outlets with named reporting
Iranian state organs: MFA spokesman, IRGC spokesman, IRNA, IRIB and Press TV	B on the state line; D on facts	Authoritative on what the state says; unreliable on damage and attribution
Tasnim, Fars, Mehr, Nour News, Defa Press	C	Directed, agenda-driven, traceable
Washington Institute, MEMRI, Factnameh, Windward, Kpler, Lloyd's List, Marsh, Cyabra	B to C	Specialist trackers and vendors; method stated, coverage partial
Houthi military and media offices	D	Strike claims frequently unconfirmed by the target state
ISWNews / Islamic World News	D	Pro-IRGC advocacy analytics

18.4 Claims graded

Claim	Grade	Note
Iran and its proxies have struck GCC territory since 28 February 2026	1	Independently and repeatedly reported; acknowledged by target states
Named-official threats (Zolfaghari, Baghaei, Rezaei, Mohebi, Abdollahi)	1	Captured verbatim and carried by multiple outlets
The 5 August warning to Gulf states	2	Five anonymous sources via Reuters; corroborated in substance by AFP
Gulf requests drove the 18 May and 2 August strike deferrals	2	Reported by multiple outlets; motive inferred
Houthi strike on Riyadh airport, 10 October: at least 12 killed (a 13th later) and at least 309 wounded	1	Saudi authorities; claimed by the Houthis
Houthi claims of strikes on Saudi energy sites, 24 to 27 October	3	Claimed; several unconfirmed by Riyadh
Hormuz daily transit counts	3	Providers conflict by definition and dark-transit share
"Black out the Gulf" or grid-paralysis scale claims	5	Adversary claim; contradicted by restoration records

19. Futures and Indicators

The outlook runs to 31 January 2027 and turns on two variables. First, whether Washington launches another large-scale campaign against Iran. A large-scale campaign means multi-day US strikes on Iranian territory

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announced by the White House or Pentagon, on the scale of the 28 February opening or the 30 August round, which meets the test; isolated strikes on Iranian vessels or proxies do not count. Second, whether the Oman and Qatar tracks produce an interim Hormuz navigation deal. The scenarios split on those two variables, and any deal that collapses into war scores under S2 or S3. Point estimates sum to 100.

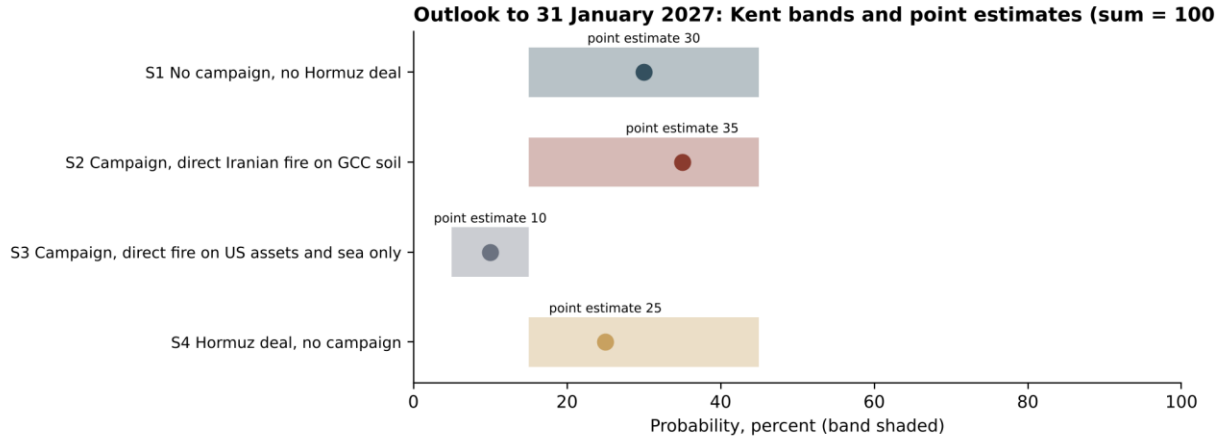


Figure 6. Outlook to 31 January 2027. Shaded bars show the Kent band; dots show the point estimate.

Scenario	Band (point estimate)	Leading indicators
S1 No further campaign, no Hormuz deal: threats, Houthi fire and ship attacks continue	Unlikely, 15 to <45 (30)	US strike decision deferred past the midterms; Houthi tempo against Saudi Arabia sustained; new catalogues and recycled spokesman lines; Brent holds between $100 and $120
S2 Further campaign, direct Iranian fire on GCC soil: a large-scale US campaign draws Iranian strikes on GCC civilian infrastructure	Unlikely, 15 to <45 (35)	White House or Pentagon strike announcement; ordered departures widen beyond Saudi Arabia; a named official pairs a specific Gulf site with a deadline; Brent settles above $120
S3 Further campaign, Iran confines direct fire to US assets and the sea; proxy fire continues	Highly unlikely, 5 to <15 (10)	Iranian statements confine retaliation to US assets; Gulf capitals publicly restrict US use of their territory or airspace
S4 Hormuz deal, no further campaign: an Oman- or Qatar-brokered arrangement eases the blockade-and-mines standoff	Unlikely, 15 to <45 (25)	An Oman News Agency statement on terms; mine clearance in the median lane; the “Strait Authority” suspends its 1 November actions; Brent below $100

Combined, S2 and S3 put a further large-scale US campaign at 45, a Roughly even chance (45 to <55) on the floor of that band. Within that branch S2 carries about three-quarters of the weight (35 of 45, or 78 percent). Iran’s record gives a second, independent basis: it struck GCC civilian infrastructure after each of three US rounds in 2026, which a simple rule of succession puts near 80 percent. The estimates agree. A 14-day window in the BLUF comes from the same record, where the longest gap was nine days.

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19.1 Escalation and de-escalation tripwires

Tripwire	Raises	Lowers
White House or Pentagon announcement of strikes on Iran, or a second Gulf mission placed on ordered departure	S2, S3	S1, S4
An on-record Iranian official naming a specific Gulf facility with a time frame	S2	S3
A cable cut or data-centre outage in the Gulf or Hormuz that the operator or a government attributes to hostile action	S2	S4
Saudi or Aramco confirmation of lost loadings at an export terminal	S1, S2	S4
Enforcement by the "Persian Gulf Strait Authority" against foreign-owned vessels after 1 November	S1	S4
Brent settling above $120, the level Bank of America ties to renewed Iranian attacks on regional infrastructure; does not separate S1 from S2	S1, S2	S4
De-escalation: a declared Houthi pause on Saudi targets	S4	S1
De-escalation: a Saudi–Iran or Qatar–Iran joint statement on Hormuz or the Houthis	S4	S2
De-escalation: scheduled direct US–Iran talks	S4	S2, S3

20. Actions

The countermeasures are informational and protective. None touches a target list. Each action names its owner group and its trigger. Complete the first set of preparations now; the trigger column sets when to step up.

Who	Action	Trigger
Gulf governments and the GCC Secretariat	Each willing GCC state, or the Secretariat on behalf of states that opt in, publishes a dated register of Iranian and proxy threats and strikes, each tied to the named office or launcher. Answer the "complicity" frame on the record by stating the legal basis of basing agreements, without disclosing force posture.	Now; update within 24 hours of each new named-official threat
Power, water and desalination operators	Run 72-hour islanding and demand-reduction drills; confirm fuel, chemical and spare-part stocks for desalination; rehearse fallback through national control centres on the Emirates Monitoring Centre model. Audit internet-exposed operational technology against the CISA advisory on IRGC-affiliated attacks on Unitronics PLCs (AA23-335A).	Now; repeat after any strike on a Gulf utility
Subsea-cable and data-centre operators	Confirm route diversity and repair-vessel access for Gulf and Hormuz segments; pre-agree traffic rerouting with carriers and cloud tenants; agree drone-alert and shelter procedures for landing stations and data centres with national air-defence and civil-defence authorities.	Now; activate on any cable cut or outage attributed to hostile action

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Who	Action	Trigger
Airports and airlines	Exercise shelter and passenger-dispersal plans; pre-plan diversions away from Saudi airports named in Houthi claims.	Any Houthi claim against an airport; any NOTAM closure
Shipping companies and war-risk underwriters	Price Hormuz risk off at least two transit-data providers and track dark-transit share; brief masters on mine reports; obtain legal advice on the "Strait Authority" claims before 1 November.	Each weekly incident count; any enforcement action after 1 November
Employers with staff in the Gulf	Review departure and shelter plans against the 21 October US ordered departure from Saudi Arabia; set a decision point for dependents.	Now for Saudi Arabia; ordered departure from a second Gulf mission for other states
Western governments	Before any strike decision, prepare a Gulf civilian-infrastructure consequence annex and a pre-cleared joint attribution package with Gulf partners; sustain enforcement against mirror channels and fake-journalist networks.	Any strike decision; each new takedown disclosure
Communicators and counter-influence teams	Pre-bunk paralysis claims with restoration data from Kuwait and the UAE; attribute each threat to its office; publish the cross-post signature when it fires; when a named-official threat is followed by a Brent move under 1 percent in the next session, publish the two facts side by side.	Each new catalogue or named-official threat

The boundary does not move. Do not engage with, reproduce, or geolocate any facility list or coordinate in Iranian messaging. Handle every such element as a messaging artifact and nothing more.

21. Intelligence Gaps, Caveats, and Corrections

21.1 Intelligence gaps and collection requirements

- **Persian originals.** Several Persian-language source pages refuse automated collection. Collect them by direct browsing and archive each page with its timestamp.
- **Houthi claims.** Match each Houthi strike claim against Saudi Ministry of Defence, GACA and Aramco statements before treating it as fact.
- **Hormuz traffic.** No single provider gives a complete count. Pull Lloyd's List Intelligence, Kpler, Windward and the Joint Maritime Information Center side by side, with dates.
- **Gulf-specific influence operations after August.** No platform or vendor disclosure since August addresses Iranian operations aimed at Gulf publics. Request Meta, Google TAG, Microsoft and Graphika reporting by region.
- **Iranian cyber operations against GCC utilities.** No confirmed Iranian intrusion into GCC power, water or oil control systems since August appears in open sources.
- **Russian and Chinese Arabic-language amplification.** Carriage of Iranian Gulf threats by RT Arabic, Sputnik Arabic and CGTN Arabic after August was not sampled. Run a dated sample before asserting coordination or its absence.
- **Houthi direction.** Whether Tehran sets Houthi targets and timing is unproven. Collect Houthi and Iranian statements on timing, weapons-interdiction records and the outcome of any Saudi–Houthi channel.

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- **Telegram coordination now.** The Factnameh measure covers only the opening three days of the war. Re-run the similarity test on a dated October sample.
- **Domestic signaling (H3).** Compare threat volume against Iranian domestic events, and Persian-only output against Arabic and English output.

21.2 Caveats

- **Reception is inferred.** Oil-price movement shows market response, not Iranian intent. Strike deferrals show Gulf influence on Washington; the weight of the Iranian threat within them is a judgment.
- **Claims from parties to the war.** Iranian, Houthi, US and Gulf statements each serve a side. Damage and attribution claims are graded, not adopted.
- **Absence is not proof.** Findings of no basing change, no cable attack and no Gulf-specific takedown reflect open-source limits.
- **Scope.** The product excludes strike feasibility, munitions, facility criticality and targeting value by design.

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22. Wrap-Up

Iran’s threat against the Gulf did not fade. Quiet in August, when words ran ahead of action, it returned in October with mines, Houthi fire and attacks on tankers behind it. Tehran’s demand stands unmet. Delivery runs through deniable hands. Its target list now reaches the cables and data centres that carry the region’s money and its internet.

Gulf capitals have turned the threat back on Washington and bought time. They have not shown that time buys safety. The US decision window stays open from the midterms through January. Operators who finish their islanding drills, cable rerouting plans and departure decisions now face that window with a plan. Brent at $115 already prices the risk.

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