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DAY 196 – THE SECOND FRONT ESCALATES SHARPLY: THE HOUTHIS SEIZE A KEY RED SEA PORT CITY ON YEMEN'S WEST COAST, ADVANCING THEIR CAMPAIGN FOR BAB EL-MANDEB AND TIGHTENING THE TWO-STRAIT SQUEEZE; OIL CLIMBS FURTHER. IN THE GULF, IRAN'S MASS ATTACK ON SHIPPING (THE WAR'S LARGEST WAVE) LEFT A SEAFARER KILLED OFF DUBAI – BUT THE US HAS ANNOUNCED NO NEW TANKER STRIKE SINCE TUESDAY, SUGGESTING A POSSIBLE PAUSE. NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

11 September 2026 (1100 GMT)

Subject: The Security Situation in Dubai, the UAE, and the Wider Middle East

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE TWO-FRONT WAR HAS CONTINUED TO ESCALATE, WITH THE HOUTHIS SEIZING A KEY RED SEA PORT IN A MAJOR ADVANCE ON THE SECOND FRONT, EVEN AS THE TANKER WAR IN THE GULF MAY BE PAUSING AFTER ITS PEAK. On the Red Sea front, Iran-backed Houthi rebels have seized a key port city on Yemen's western coast, escalating their campaign to control the Bab el-Mandeb Strait and tightening the two-strait squeeze on the region's oil exports; oil has climbed further, above $100. In the Gulf, Iran's mass attack on shipping – the largest declared wave of shipping attacks of the war – has left a trail of damage: a seafarer was killed aboard a products tanker off Dubai, the tanker Andros was set afire in Iraqi waters, and several vessels were hit; but US Central Command has announced no new strike on an Iranian tanker since Tuesday, suggesting the US-Iran tanker exchange may be pausing. Iran's threatened disproportionate strike has not yet materialised. There is NO CONFIRMED DAMAGING STRIKE on UAE territory, ports or infrastructure – but a seafarer was killed off Dubai, and the maritime danger near the UAE persists. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, holds readiness at a high level, and advises clients to complete departures, protect energy and water resilience, and suspend all transits.

⚠ **ASSESSMENT:** A DIVERGENCE – THE SECOND FRONT ESCALATES AS THE GULF EXCHANGE MAY PAUSE. The day's developments point in two directions. On the Red Sea front, the Houthis' seizure of a key port city is a significant escalation – it advances their campaign for the Bab el-Mandeb, gains them territory toward the strait, and tightens the two-strait squeeze on Gulf oil exports, keeping the energy picture under severe pressure. In the Gulf, by contrast, the US-Iran tanker exchange may be pausing: US Central Command has announced no new tanker strike since Tuesday, and while Iran's mass attack on shipping was the largest of the war, it may mark a peak rather than a step to further escalation – though Iran's threatened disproportionate strike still looms. For the UAE, the significant development is that the human cost of the tanker war has reached the waters near its coast, with a seafarer killed off Dubai; this is a shipping fatality at sea, not a strike on UAE territory, and the territorial threshold remains uncrossed, but it marks a further heightening of the maritime danger near the UAE. For UAE clients, the posture must remain at its most cautious:

MAXIMUM, high readiness, complete departures, suspend all transits, protect energy and water resilience, and vigilance. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 196 – THE SECOND FRONT ESCALATES; THE GULF EXCHANGE MAY PAUSE

The two-front war has continued to escalate, but in a divergence, with the Houthis seizing a key Red Sea port in a major advance on the second front, even as the tanker war in the Gulf may be pausing after its peak. On the Red Sea front, Iran-backed Houthi rebels have seized a key port city on Yemen's western coast, escalating their campaign to control the Bab el-Mandeb Strait, gaining territory toward the chokepoint, and tightening the two-strait squeeze on the region's oil exports; oil prices have climbed further, above $100 a barrel, and Saudi Aramco's Jizan facilities were struck for a second time in a month. In the Gulf, Iran's mass attack on shipping the previous day – which Reuters described as the largest declared wave of shipping attacks by either side since the war began – has left a trail of damage: a seafarer was killed aboard a products tanker off Dubai, the Panama-flagged tanker Andros was set afire by a drone in Iraqi waters with its crew unhurt, a cargo ship was struck off al-Faw in Iraq, and several vessels were hit by disabling fire; but US Central Command has announced no new strike on an Iranian tanker since Tuesday, suggesting the US-Iran tanker exchange may be pausing. Iran's earlier missile salvo on Jordan's Muwaffaq Salti airbase, initially reported as causing no casualties, is now assessed to have damaged US aircraft, and Gulf states – Saudi Arabia, Bahrain, Qatar and Egypt – condemned the attacks. Iran's threatened disproportionate strike has not yet materialised, and there is no confirmed damaging strike on UAE territory, ports or infrastructure. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, protect energy and water resilience, and suspend all transits.

Where Things Stand

Element	Status (as of 1100 GMT Friday 11 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The second front escalates; the Gulf exchange may pause. Complete departures; high readiness; suspend all transits.
Second front (Red Sea)	**HOUTHIS SEIZE A PORT.** Houthis seized a key port city on Yemen's west coast, advancing their campaign for Bab el-Mandeb. The two-strait squeeze tightens.
Gulf tanker war	**POSSIBLE PAUSE.** Iran's mass attack (the war's largest wave) left several vessels hit; but CENTCOM has announced no new tanker strike since Tuesday.
Seafarer killed off Dubai	**NEAR THE UAE.** A seafarer was killed aboard a products tanker off Dubai. Shipping at sea, not a strike on UAE territory; but the first shipping death near the UAE.
Oil	**ABOVE $100.** Oil climbed further on the Houthi port seizure and Iran's vessel attacks; six-week highs. Risk premium high.
Jordan base strike	Revision: Iran's 20-missile salvo on Jordan's Muwaffaq Salti airbase is now assessed to have damaged US aircraft (an A-10 and eight F-15Es).
UAE territory	**NO CONFIRMED STRIKE.** No confirmed damaging strike on UAE soil, ports or infrastructure. A seafarer was killed off Dubai (shipping at sea). Airports open.

WS Assessment: The war has diverged: the second front is escalating sharply with the Houthi seizure of a Red Sea port, while the Gulf tanker exchange may be pausing after its peak; the human cost has reached the waters near the UAE with a seafarer killed off Dubai. The territorial threshold has not been crossed – no confirmed strike on UAE territory – but the danger near the UAE and the two-strait squeeze persist. The alert stays at MAXIMUM with high readiness.

2. THE SECOND FRONT ESCALATES – THE HOUTHIS SEIZE A RED SEA PORT; THE TWO-STRAIT SQUEEZE TIGHTENS

- **The Houthis seize a port:** Iran-backed Houthi rebels have seized a key port city on Yemen's western, Red Sea coast, in a major escalation of their campaign to control the Bab el-Mandeb Strait; the seizure gains the Houthis territory toward the chokepoint and strengthens their ability to threaten shipping and Saudi oil exports through the Red Sea.
- **Advancing on Bab el-Mandeb:** The port seizure advances the Houthi campaign for the Bab el-Mandeb – the chokepoint connecting the Red Sea to the Gulf of Aden – and follows the group's major attack on Saudi Arabia earlier in the week; the Houthis have made clear their intent to control the strait and to sustain a "siege-for-siege" against Saudi Arabia.
- **The two-strait squeeze tightens:** The seizure tightens the two-strait squeeze on Gulf oil exports: with Iran's blockade and interdiction of Hormuz and the Houthis now advancing on Bab el-Mandeb, both of the chokepoints through which the region's oil reaches world markets are under intensifying threat, and the pressure on Saudi Arabia, the world's top oil exporter, is mounting on both routes.
- **Saudi facilities struck again:** Saudi Aramco's Jizan facilities were struck for the second time in a month, according to reporting citing people familiar with the matter, possibly delaying the facility's return to production; the repeated strikes on Saudi oil infrastructure demonstrate the vulnerability of Gulf energy assets to the Houthi campaign.
- **Oil climbs:** Oil prices climbed further on the Houthi port seizure and Iran's vessel attacks, remaining above $100 a barrel at six-week highs; the two-front war's pressure on the region's oil exports, and the fear of a sustained disruption, keep the risk premium high.

WS Assessment: The Houthi seizure of a Red Sea port is a significant escalation of the second front, tightening the two-strait squeeze and raising the pressure on Gulf oil exports and infrastructure. For the UAE and the wider Gulf, the energy picture remains acutely tight, and the Red Sea front is now escalating; clients should protect energy resilience and watch the Houthi advance closely.

3. THE TANKER WAR – THE LARGEST WAVE OF SHIPPING ATTACKS; A SEAFARER KILLED OFF DUBAI; A POSSIBLE PAUSE

- **The largest wave of shipping attacks:** Iran's mass attack on shipping the previous day – in which it claimed to have attacked ten vessels near the Strait – was, according to Reuters, the largest declared wave of tit-for-tat shipping attacks by either side since the war began, marking the enforcement of Iran's exclusion zone and a general assault on merchant shipping in and around the Strait.
- **A seafarer killed off Dubai:** The attacks left a trail of damage, including, of particular relevance to the UAE, at least one seafarer killed aboard a products tanker off Dubai – the first shipping fatality in the waters near the UAE in this sequence. This is a death aboard a vessel at sea, near the UAE's coast, not a strike on UAE territory, ports or infrastructure; the territorial threshold has not been crossed.
- **Further vessels hit:** The Panama-flagged tanker Andros was set afire by a drone in Iraqi territorial waters, with its 22 crew unhurt; a cargo ship was struck off al-Faw in Iraq; a vessel was seen listing off Port Rashid; and several merchant vessels in the northern Gulf and the Gulf of Oman were hit by disabling fire – the assault spanned Iraqi waters, the Gulf, the Gulf of Oman, and the waters near the UAE.
- **A possible pause in the US-Iran exchange:** US Central Command disputed Iran's claims – saying no US vessel was struck and all IRGC attempts failed – and, notably, has announced no new strike on an Iranian tanker since the five destroyed on Tuesday; this suggests the US-Iran tanker exchange may be pausing after its peak, though the pause is unconfirmed and Iran's threatened disproportionate strike still looms.
- **The Jordan strike reassessed:** Iran's earlier 20-missile salvo on Jordan's Muwaffaq Salti airbase, initially reported by Jordan as causing no casualties, is now assessed to have damaged an A-10 wing and eight F-15E aircraft – revising the picture of the attack and indicating Iran's strikes on US assets have been more effective than first reported.

WS Assessment: The tanker war reached a peak with the largest wave of shipping attacks of the war, and its human cost has reached the waters near the UAE with a seafarer killed off Dubai; but the US-Iran exchange may now be pausing. Clients should not read the possible pause as a de-escalation – the second front is escalating, Iran's disproportionate threat looms, and the danger near the UAE persists – and all transits should remain suspended.

4. THE UAE; THE REGIONAL PICTURE

- **No confirmed strike on UAE territory – but a seafarer killed off Dubai:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no casualties on UAE soil; but a seafarer was killed aboard a products tanker off Dubai, the human cost of the tanker war reaching the waters near the UAE, and a vessel was seen listing off Port Rashid. The territorial threshold has not been crossed, but the maritime danger near the UAE has heightened further.
- **The UAE's pragmatic engagement:** The UAE continues to pursue a pragmatic, de-escalatory posture, maintaining communication with Iran while the confrontation escalates around it; its diplomatic adviser has reaffirmed that geography leaves the UAE and its Gulf neighbours little choice but to keep channels open, a stance that may help insulate the UAE even as the danger near its waters grows.
- **The threats to the UAE:** Iran's exclusion zone and interdiction directly affect UAE-linked shipping, its threatened disproportionate response raises the risk of a strike on Gulf infrastructure or bases, and the two-strait squeeze tightens the UAE's energy picture; the danger to the UAE, while not yet a territorial strike, is acute and has moved into the waters near its coast.
- **US security posture:** US security alerts for the region, warning of the potential for unforeseen escalation and urging heightened vigilance amid possible flight cancellations and airspace closures, remain in force; the threat environment across the Gulf is heightened, and clients should hold high readiness and protect energy resilience.
- **Utility and shelter measures:** Keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption, and Iran's threats to Gulf energy infrastructure make resilience a priority. Follow official UAE and NCEMA guidance.

WS Assessment: The heightening of the maritime danger near the UAE – a seafarer killed off Dubai, a vessel listing off Port Rashid – raises the risk to the UAE and its shipping, even as the territorial threshold remains uncrossed and the UAE maintains its pragmatic engagement. Clients should hold high readiness, protect energy and water resilience, treat the waters near the UAE as hostile, and watch for any escalation toward UAE territory.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The danger near the UAE persists:** The maritime danger in the waters near the UAE persists, with a seafarer killed off Dubai and a vessel listing off Port Rashid, following the largest wave of shipping attacks of the war; UKMTO has advised vessels to proceed with caution across the northern Gulf, the Gulf of Oman and the Strait.
- **Oil above $100:** Oil prices remain above $100 a barrel at six-week highs, having climbed further on the Houthi seizure of a Red Sea port and Iran's vessel attacks; the two-front war, the two-strait squeeze, and the strikes on Saudi oil facilities keep the risk premium high, and a further escalation would drive prices higher still.
- **Both straits under intensifying threat:** Both the Strait of Hormuz and the Bab el-Mandeb are under intensifying threat, with Iran interdicting Hormuz and the Houthis advancing on Bab el-Mandeb; the region's key oil corridors, and the waters between them, are an active strike zone, and transit is acutely dangerous.
- **The blockade and the fronts:** The US naval blockade remains in force, though the US may have paused its tanker strikes; the Houthi campaign for Bab el-Mandeb is escalating, and Israel is bracing for an Iranian attack – the regional fronts remain wide as the confrontation continues.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports; a seafarer was killed off Dubai and a vessel was reported listing off Port Rashid. UAE-linked operators should treat the Strait, the Bab el-Mandeb, and the waters near the UAE as active, hostile strike zones and suspend all transits.

WS Assessment: The maritime picture remains acutely dangerous, with the danger near the UAE persisting, oil above $100, and both straits under intensifying threat; the possible pause in the US-Iran exchange does not lift the danger. For UAE-linked operators, all transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **The danger near the UAE persists – but no confirmed strike on UAE territory.** A seafarer was killed off Dubai and a vessel was seen listing off Port Rashid, the maritime danger reaching the waters near the UAE; but there is no confirmed damaging strike on UAE territory, ports or infrastructure. The second front is escalating with the Houthi port seizure, and Iran's threats directly affect the UAE.
- **COMPLETE DEPARTURES NOW – THE DANGER IS NEAR.** With airports operating, complete any deferred non-essential departure on scheduled commercial flights without delay. The maritime danger has reached the waters near the UAE and Iran's disproportionate threat looms; completing departures now is a priority, and the window should not be assumed to remain open.
- **HOLD READINESS AT A HIGH LEVEL – WATCH FOR ANY ESCALATION TOWARD UAE TERRITORY.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the danger has moved into the waters near the UAE, and Iran has threatened a heavier response. Review shelter locations and NCEMA guidance, keep go-bags current, and be prepared to shelter promptly on any alert. The UAE hosts US forces at Al Dhafra.
- **PROTECT ENERGY AND WATER RESILIENCE.** The two-strait squeeze, the Houthi port seizure and strikes on Saudi oil facilities, and the risk of an Iranian response against Gulf oil infrastructure keep energy resilience a priority. Keep water, fuel and generator contingencies ready.
- **Shipping: SUSPEND ALL TRANSITS – THE WATERS NEAR THE UAE REMAIN A STRIKE ZONE.** A seafarer has been killed off Dubai, a vessel is listing off Port Rashid, and Iran is enforcing its exclusion zone. Suspend all transits, hold vessels clear of the Strait, the Bab el-Mandeb, the Gulf of Oman and the waters near the UAE, and treat the region's waters as an active strike zone until a durable de-escalation is confirmed.
- **Review Iran-related sanctions exposure.** Review exposure to Iran-related sanctions risk through exchange houses, trade finance, shipping and re-export, and watch for new designations under the US "Operation Economic Outcast" campaign; consult qualified counsel. This is not legal advice.

Return Guidance: MAXIMUM Held, High Readiness – the Second Front Escalating, the Danger Near the UAE

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The second front is escalating with the Houthi seizure of a Red Sea port, the Gulf tanker exchange may be pausing, and a seafarer has been killed off Dubai; but there is no confirmed strike on UAE territory. Clients should complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch for any escalation toward UAE territory.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE; the second front is escalating and the danger has reached the waters near the UAE – this is not a setting for returns.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the open airports to finish any deferred departures without delay, on scheduled commercial flights; do not assume the window remains open.
- **Essential personnel – high readiness:** Maintain shelter-in-place and evacuation readiness at a high level, review shelter locations, keep documentation and go-bags current, and monitor for any escalation toward UAE territory, a disproportionate Iranian response, further vessel attacks near the UAE, and the Houthi campaign for Bab el-Mandeb.
- **Business/compliance clients:** Review exposure given the US sanctions campaign, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A confirmed cessation of the strikes on both fronts, the lifting of the US blockade, a confirmed de-escalation or ceasefire, and a genuine reopening of the straits with verified safe passage would allow the alert to come down. The

possible pause in the Gulf tanker exchange is not a confirmed de-escalation, and the second front is escalating; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.

- **Further escalation – the central risk:** A strike on UAE territory, ports or infrastructure, a disproportionate Iranian strike, an Iranian move against Gulf oil infrastructure, a further escalation of the Houthi campaign, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the second front escalating, the danger near the UAE, the disproportionate threat looming; protect people first, complete departures now, hold high readiness, suspend all transits, and protect energy and water resilience.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the second front escalates, the danger reaches near the UAE.** The Houthis have seized a key Red Sea port, advancing their campaign for Bab el-Mandeb and tightening the two-strait squeeze; oil is above $100. In the Gulf, Iran's mass attack (the war's largest wave) left a seafarer killed off Dubai, though the US may have paused its tanker strikes. There is no confirmed strike on UAE territory, but the danger has reached the waters near the UAE.
- **NOTE THE POSSIBLE PAUSE IN THE GULF – BUT DO NOT READ IT AS DE-ESCALATION.** CENTCOM has announced no new tanker strike since Tuesday, suggesting a possible pause; but the second front is escalating, Iran's disproportionate threat looms, and the pause is unconfirmed. Await a confirmed, durable de-escalation on both fronts.
- **A SEAFARER KILLED OFF DUBAI – THE DANGER IS NEAR, BUT THE THRESHOLD NOT CROSSED.** The human cost has reached the waters near the UAE, but this is a shipping fatality at sea, not a strike on UAE territory. Suspend all transits and watch for any escalation toward UAE territory.
- **WATCH THE HOUTHI ADVANCE ON BAB EL-MANDEB – THE TWO-STRAIT SQUEEZE TIGHTENS.** The Houthi seizure of a Red Sea port tightens the squeeze on Gulf oil exports. Protect energy resilience and watch the Houthi campaign and any further strikes on Saudi oil infrastructure.
- **COMPLETE DEPARTURES NOW; PROTECT ENERGY AND WATER RESILIENCE.** Complete deferred non-essential departures on scheduled flights without delay, keep shelter readiness current, and protect energy resilience. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) any strike on UAE territory, ports or infrastructure; (2) a disproportionate Iranian strike; (3) further vessel attacks in the waters near the UAE; (4) the Houthi advance on Bab el-Mandeb; (5) whether the US-Iran tanker exchange resumes or pauses; (6) an Iranian attack on Israel.
- **The second front escalates, the danger reaches near the UAE – emergency updates to follow.** Westminster Security will issue immediate updates on any strike on UAE territory, any further vessel attacks near the UAE, any disproportionate Iranian strike, any major escalation on either front, or any major development, and will lower the alert to HIGH only once a durable de-escalation is confirmed.
- **This is the one hundred and eighty-third edition.** Day 196 of the war.

8. KEY POINTS

- **THE SECOND FRONT ESCALATES – THE HOUTHIS SEIZE A RED SEA PORT.** Iran-backed Houthi rebels have seized a key port city on Yemen's western coast, a major escalation of their campaign to control the Bab el-Mandeb Strait; the seizure gains territory toward the chokepoint and tightens the two-strait squeeze on the region's oil exports. Saudi Aramco's Jizan facilities were struck again, and oil climbed further, above $100.
- **THE GULF TANKER WAR MAY BE PAUSING – BUT NOT DE-ESCALATING.** Iran's mass attack on shipping was the largest declared wave of the war, but US Central Command has announced no new tanker strike since Tuesday, suggesting the US-Iran exchange may be pausing. This is not a confirmed de-escalation: the second front is escalating, Iran's threatened disproportionate strike looms, and the danger near the UAE persists.
- **A SEAFARER KILLED OFF DUBAI – THE DANGER REACHES NEAR THE UAE.** At least one seafarer was killed aboard a products tanker off Dubai – the first shipping fatality in the waters near the UAE in this sequence. This is a death aboard a vessel at sea, not a strike on UAE territory, ports or infrastructure; the territorial threshold has not been crossed. But it marks a further heightening of the maritime danger near the UAE. Hold high readiness.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE UAE MAINTAINS ENGAGEMENT.** There is no confirmed damaging strike on UAE territory, ports or infrastructure. The UAE continues its pragmatic engagement with Iran, maintaining communication while the confrontation escalates – a stance that may help insulate it, though the danger near its waters has grown. Iran's exclusion zone and threats directly affect the UAE; protect energy resilience.
- **OIL ABOVE $100; BOTH STRAITS UNDER INTENSIFYING THREAT.** Oil remains above $100 at six-week highs, having climbed on the Houthi port seizure and Iran's vessel attacks. Both the Strait of Hormuz and the Bab el-Mandeb are under intensifying threat, with the waters between – including near the UAE – an active strike zone. Iran's Jordan base strike is now assessed to have damaged US aircraft. Suspend all transits.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND EIGHTY-THIRD EDITION. DAY 196.** The second front is escalating with the Houthi port seizure, the Gulf exchange may be pausing, and a seafarer has been killed off Dubai – but no UAE territory has been struck. Both phases remain suspended; complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, review sanctions exposure, and watch for any escalation toward UAE territory. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 11th September 2026 – Information current as of 11:00 GMT

THE TWO-FRONT WAR HAS CONTINUED TO ESCALATE, BUT IN A DIVERGENCE. ON THE RED SEA FRONT, IRAN-BACKED HOUTHI REBELS HAVE SEIZED A KEY PORT CITY ON YEMEN'S WESTERN COAST, ADVANCING THEIR CAMPAIGN FOR BAB EL-MANDEB AND TIGHTENING THE TWO-STRAIT SQUEEZE; OIL HAS CLIMBED FURTHER, ABOVE $100. IN THE GULF, IRAN'S MASS ATTACK ON SHIPPING (THE WAR'S LARGEST WAVE) LEFT A SEAFARER KILLED OFF DUBAI – BUT THE US HAS ANNOUNCED NO NEW TANKER STRIKE SINCE TUESDAY, SUGGESTING A POSSIBLE PAUSE.

THERE IS NO CONFIRMED DAMAGING STRIKE ON UAE TERRITORY, PORTS OR INFRASTRUCTURE – THE THRESHOLD IS NOT CROSSED – BUT A SEAFARER WAS KILLED OFF DUBAI (SHIPPING AT SEA), AND THE MARITIME DANGER NEAR THE UAE HAS HEIGHTENED. IRAN'S THREATENED DISPROPORTIONATE STRIKE HAS NOT YET MATERIALISED. DO NOT READ THE POSSIBLE GULF PAUSE AS DE-ESCALATION – THE SECOND FRONT IS ESCALATING. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH THE HOUTHI ADVANCE ON BAB EL-MANDEB, ANY ESCALATION TOWARD UAE TERRITORY, AND WHETHER THE US-IRAN TANKER EXCHANGE RESUMES. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-THIRD EDITION. DAY 196.