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DAY 198 – ESCALATION AND DIPLOMACY DIVERGE: THE HOUTHIS SEIZE THE ISLAND IN THE MIDDLE OF BAB EL-MANDEB (A PHYSICAL OUTPOST CONTROLLING THE STRAIT), AND SAUDI ARABIA'S EAST-WEST PIPELINE STAYS SHUT (~700,000 BPD LOST) – BUT GENUINE DIPLOMATIC THREADS EMERGE: AN IRAN-UAE THAW (PEZESHKIAN AND THE ABU DHABI CROWN PRINCE HAD A "CONSTRUCTIVE EXCHANGE," WANT TO "TURN THE PAGE"), AND IRAN-GULF TALKS IN OMAN ON MONDAY – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

13 September 2026 (1100 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE MILITARY SITUATION HAS CONTINUED TO ESCALATE, EVEN AS GENUINE DIPLOMATIC THREADS HAVE EMERGED. On the Red Sea front, the Houthis have seized the island in the middle of the Bab el-Mandeb Strait – a physical outpost that divides the strait into two channels and tightens their grip on the chokepoint – and Saudi Arabia's East-West oil pipeline remains shut, with a reported loss of some 700,000 barrels a day; the comprehensive squeeze on Gulf oil exports persists, and the Houthis have vowed to continue their "blockade for blockade." But, in a significant shift, diplomatic threads have emerged: Iran's president has reported a "constructive exchange" with the Crown Prince of Abu Dhabi, with both sides seeking to "turn the page" on their deteriorated relations; Saudi Arabia has accepted a channel to Tehran through Oman; and Iran is due to meet Gulf states in Oman on Monday to discuss the Strait. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. 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 – while watching the emerging diplomacy.

✓ **DIPLOMATIC THREAD:** THE FIRST REAL DIPLOMATIC THREADS – AN IRAN-UAE THAW OF PARTICULAR NOTE. Amid the continued military escalation, the day has brought the first genuinely positive diplomatic developments in this phase, and one of particular relevance to the UAE. Iran's president has reported a constructive exchange with the Crown Prince of Abu Dhabi on the sidelines of a summit, with both sides seeking to turn the page on relations that had deteriorated sharply since the war began – a direct Iran-UAE thaw that vindicates the UAE's pragmatic engagement and may help insulate it further. Alongside this, Saudi Arabia has accepted a channel to Tehran through Oman, and Iran is due to meet Gulf states in Oman on Monday – suggesting Iran may be seeking to convert its strategic gains into diplomatic leverage, and that the Gulf states are pursuing a negotiated de-escalation. These are threads, not a settlement: the Red Sea front is escalating, the comprehensive squeeze on Gulf oil persists, the pipeline is shut, and the Houthis vow to continue. But they are the most hopeful signs in weeks, and the Iran-UAE thaw is of direct significance to the UAE.

⚠ **ASSESSMENT:** THE POSTURE REMAINS AT MAXIMUM – THE MILITARY SITUATION IS SEVERE, THE THREADS UNPROVEN. The diplomatic threads are genuinely encouraging, but they are unproven and set against a severe military situation, and the alert stays at MAXIMUM. Nothing has been resolved: the Houthis have seized the Bab el-Mandeb island and vow to continue their campaign, Saudi Arabia's East-West pipeline remains shut, the comprehensive squeeze on Gulf oil exports persists across all major routes, and Iran's threatened disproportionate strike still looms. The Iran-UAE thaw and the Oman talks are openings, not agreements, and this war has repeatedly seen apparent diplomatic progress collapse; whether Iran converts its strategic gains into a genuine de-escalation, or uses the talks to consolidate them, remains to be seen. For UAE clients, the posture must remain at its most cautious while the diplomacy is tested: MAXIMUM, high readiness, complete departures, suspend all transits, protect energy and water resilience, and vigilance – while watching the Iran-UAE thaw and the Oman talks closely. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 198 – ESCALATION AND DIPLOMACY DIVERGE

The war has entered a phase of divergence, with the military situation continuing to escalate even as the first genuinely positive diplomatic threads in this phase have emerged. On the Red Sea front, the Houthis have seized the island in the middle of the Bab el-Mandeb Strait – a small volcanic formation that divides the strait into two channels, giving the movement a physical outpost that tightens its grip on the chokepoint, though analysts note that holding the exposed island may prove difficult; Saudi Arabia's East-West oil pipeline, struck by Iran-aligned drones from Iraq, remains shut, with the loss placed at some 700,000 barrels a day, and the comprehensive squeeze on Gulf oil exports across all major routes persists. But diplomatic threads of real significance have emerged. Most notably for the UAE, Iran's president reported a constructive exchange with the Crown Prince of Abu Dhabi on the sidelines of a summit, with both sides expressing a desire to turn the page on relations that had deteriorated sharply since the war began – a direct Iran-UAE thaw. Alongside this, Saudi Arabia has accepted a channel to Tehran through Oman, Iran is due to meet Gulf states in Oman on Monday to discuss the Strait, and Iran has offered to support negotiations to end the Yemen conflict. In the Gulf, the tanker war has quietened, with only about eight commercial vessels transiting the Strait and no new attacks reported in either strait in the latest data. There is no confirmed strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. 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, while watching the emerging diplomacy.

Where Things Stand

Element	Status (as of 1100 GMT Sunday 13 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. Escalation and diplomacy diverge. Complete departures; high readiness; suspend all transits.
Iran-UAE thaw	**CONSTRUCTIVE EXCHANGE.** Pezeshkian and the Abu Dhabi Crown Prince had a "constructive exchange" on a summit sideline; both want to "turn the page." A direct Iran-UAE opening.
Oman talks	**MONDAY.** Iran to meet Gulf states in Oman Monday; Saudi Arabia has accepted a channel to Tehran through Oman (Salalah). Iran offers to support Yemen talks.
Red Sea front	**HOUTHIS SEIZE THE ISLAND.** Houthis have seized the island in the middle of Bab el-Mandeb, a physical outpost controlling the strait. They vow "blockade for blockade."
Saudi pipeline	**STILL SHUT.** Saudi Arabia's East-West pipeline (its Hormuz bypass) remains shut; ~700,000 bpd lost. The comprehensive squeeze on Gulf oil persists.
Gulf tanker war	**QUIETER.** Only ~8 vessels transited the Strait; no new attacks in either strait in the latest data, though vessels remain hesitant.

UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE in the latest period. Airports open.

WS Assessment: Escalation and diplomacy have diverged: the Red Sea front is escalating and the comprehensive squeeze on Gulf oil persists, but genuine diplomatic threads – an Iran-UAE thaw, the Oman channel, the Monday talks – have emerged, the first in weeks. The alert stays at MAXIMUM with high readiness while the diplomacy is tested; the Iran-UAE thaw is of direct significance to the UAE, and clients should watch it and the Oman talks closely, without yet reading them as a settlement.

2. THE RED SEA FRONT ESCALATES – THE HOUTHIS SEIZE THE BAB EL-MANDEB ISLAND; THE PIPELINE STAYS SHUT

- **The island seized:** The Houthis have seized the island in the middle of the Bab el-Mandeb Strait – a volcanic formation of some thirteen square kilometres that sits in the middle of the strait and divides it into two channels – giving the movement a physical outpost between the channels and a decisive position over the chokepoint, following its capture of Yemen's entire Red Sea coast.
- **A grip on the chokepoint:** Control of the island tightens the Houthis' grip on the Bab el-Mandeb, the southern gateway to the Red Sea and the approach to the Saudi terminals built to move crude to Europe without touching Hormuz; its passage into Houthi hands compounds the shutdown of the East-West pipeline rather than merely coinciding with it, deepening the squeeze on Saudi oil exports.
- **Difficult to hold:** Analysts assess the seizure as a significant military advance that could reshape the Houthis' conflict with Saudi-backed forces and benefit Iran, but caution that holding the island over time may prove difficult – it is small, exposed, dependent on resupply across water, and within reach of air power belonging to at least three states; the advance is significant but not necessarily durable.
- **The pipeline stays shut:** Saudi Arabia's East-West oil pipeline, struck by Iran-aligned drones launched from Iraq, remains shut, with Saudi energy ministry sources placing the loss from damage to a pumping station at approximately 700,000 barrels a day; the shutdown removes, for now, Saudi Arabia's principal means of circumventing the Hormuz blockade.
- **The Houthis vow to continue:** The Houthis have vowed to continue their "blockade for blockade," including attacks on Saudi-backed forces and further escalation, until, they say, the aggression against Yemen ends and the Saudi blockade is lifted; the Red Sea front therefore remains on an escalatory path despite the emerging diplomacy.

WS Assessment: The Houthi seizure of the Bab el-Mandeb island and the continued shutdown of Saudi Arabia's pipeline deepen the comprehensive squeeze on Gulf oil exports and keep the Red Sea front escalating. For the UAE and the wider Gulf, the energy picture remains severely tight; clients should protect energy resilience and treat both straits as hostile, even as the diplomacy develops.

3. DIPLOMATIC THREADS EMERGE – THE IRAN-UAE THAW, THE OMAN CHANNEL, THE MONDAY TALKS

- **The Iran-UAE thaw:** In the most significant diplomatic development for the UAE, Iran's president has reported a constructive exchange with the Crown Prince of Abu Dhabi, Sheikh Khaled bin Mohamed bin Zayed Al Nahyan, on the sidelines of a summit, saying it was the first such exchange since the war and the incidents in the Gulf, and that both sides wished to turn the page on relations that had deteriorated sharply since the war began.
- **A vindication of the UAE's engagement:** The Iran-UAE thaw vindicates the UAE's consistent, pragmatic policy of maintaining communication with Iran despite the escalation, and may help insulate the UAE further from the confrontation; a direct channel between Tehran and Abu Dhabi, if sustained, would reduce the risk to the UAE and support a broader de-escalation.
- **The Oman channel and the Monday talks:** Alongside the Iran-UAE thaw, Saudi Arabia has accepted a channel to Tehran through Oman, reflected in a meeting at Salalah, and Iran is due to meet Gulf states in Oman on Monday to discuss the Strait of Hormuz; the Gulf states are pursuing a negotiated de-escalation, and the UAE, as a Gulf state, would be a party to the Monday talks.
- **Iran seeking leverage:** Iran has also called for an end to Saudi Arabia's blockade of Yemen and offered to support negotiations to end the Yemen conflict; experts assess that Iran's strategic gains – the comprehensive squeeze on Gulf oil – could give it more leverage in negotiations with the United States, and Iran may be seeking to convert those gains into a negotiated outcome on its terms.
- **Threads, not a settlement:** These are diplomatic threads, not a settlement: the Red Sea front is escalating, the pipeline is shut, the comprehensive squeeze persists, and the Houthis vow to continue; and this war has repeatedly seen apparent diplomatic progress collapse. But the Iran-UAE thaw and the Oman talks are the most hopeful signs in weeks, and warrant close attention.

WS Assessment: The emergence of genuine diplomatic threads – the Iran-UAE thaw above all, alongside the Oman channel and the Monday talks – is the most encouraging development in this phase, and of direct significance to the UAE. But the threads are unproven and set against a severe, escalating military situation; clients should watch them closely without yet treating them as a de-escalation, and hold their posture until a durable outcome is confirmed.

4. THE GULF TANKER WAR; THE UAE; THE REGIONAL PICTURE

- **The Gulf tanker war quietens:** In the Gulf, the tanker war has quietened from its peak: only about eight commercial vessels transited the Strait in the latest data, and no new attacks were reported in either the Strait or the Bab el-Mandeb in the most recent period, though vessels remain hesitant to cross and the Strait is far below its pre-war traffic of some 130 ships a day.
- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack in the waters near the UAE in the latest period; the vessel incidents of recent days – the seafarer killed off Dubai, the vessel listing off Port Rashid – have not been repeated, and the quietening of the Gulf tanker war has, for now, reduced the immediate maritime danger near the UAE.
- **The UAE's energy picture:** The comprehensive squeeze on Gulf oil exports – across Hormuz, the Red Sea and the East-West pipeline – keeps the UAE's energy picture tight, though the UAE has not been struck; the Iran-UAE thaw and the Oman talks, if they progress, could begin to ease the pressure on the region's export routes.
- **The UAE's diplomatic position:** The Iran-UAE thaw places the UAE at the centre of the emerging diplomacy, and the UAE would be a party to the Monday Gulf-Iran talks in Oman; the UAE's pragmatic posture appears to be bearing fruit, and clients should watch whether the thaw and the talks develop into a durable de-escalation.
- **US security posture:** US security alerts for the region remain in force, and the threat environment across the Gulf is heightened; the UAE hosts US forces at Al Dhafra, and the Gulf states hosting US forces remain exposed to Iranian retaliation should the diplomacy fail. Clients should hold high readiness and protect energy resilience.

WS Assessment: The quietening of the Gulf tanker war and the Iran-UAE thaw have reduced the immediate danger to the UAE, though the comprehensive squeeze on Gulf oil persists and the military situation remains severe. Clients should hold high readiness, protect energy and water resilience, watch the Iran-UAE thaw and the Oman talks closely, and remain vigilant for any renewed escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **All major oil routes still under threat:** All of the region's major oil-export routes remain under threat: the Strait of Hormuz, blockaded and interdicted by Iran and far below normal traffic; the Bab el-Mandeb and the Red Sea, with the Houthis now controlling the coast and the mid-strait island; and the East-West pipeline, shut after the Iraqi drone strike – the comprehensive squeeze on Gulf oil exports persists.
- **Oil and diesel elevated:** Oil prices remain elevated and diesel at record highs, driven by the comprehensive squeeze; the emerging diplomacy – the Iran-UAE thaw and the Oman talks – could begin to ease prices if it progresses, but the pipeline shutdown, the Red Sea escalation, and the risk of a renewed disruption keep the risk premium high.
- **The Gulf tanker war quieter:** The Gulf tanker war has quietened, with no new attacks reported in either strait in the latest data and only about eight vessels transiting the Strait; but traffic remains far below normal, vessels remain hesitant, and the waters of the Strait and the Gulf of Oman remain a hostile zone.
- **The Red Sea front:** The Red Sea front has escalated, with the Houthis controlling Yemen's Red Sea coast and the mid-strait island and threatening Saudi oil tankers; Saudi Arabia is responding with air strikes but has accepted a channel to Tehran through Oman, and the US has declined to strike the Houthis.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports, and no new attack near the UAE in the latest period; vessels remain anchored off the UAE's east coast at Khor Fakkan. UAE-linked operators should continue to treat the Strait, the Bab el-Mandeb and the waters near the UAE as hostile and suspend all transits.

WS Assessment: The maritime and energy picture remains one of a comprehensive squeeze on the region's oil exports, with oil and diesel elevated, though the Gulf tanker war has quietened; the emerging diplomacy offers the prospect of easing if it progresses. For UAE-linked operators, all transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **An Iran-UAE thaw and a quieter Gulf – but the squeeze persists, and no confirmed strike on UAE territory.** An Iran-UAE thaw has emerged and the Gulf tanker war has quietened, reducing the immediate danger to the UAE; but the comprehensive squeeze on Gulf oil persists and the Red Sea front is escalating. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. The UAE is at the centre of the emerging diplomacy.
- **USE THE QUIETER PERIOD – COMPLETE OUTSTANDING DEPARTURES.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The diplomacy is unproven and the military situation severe; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – THE DIPLOMACY IS UNPROVEN.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the Iran-UAE thaw and the Oman talks are openings, not agreements, and the escalation could resume. 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 COMPREHENSIVE SQUEEZE PERSISTS.** All major Gulf oil routes remain threatened and oil and diesel are at record highs. Protect energy resilience; keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption.
- **Shipping: SUSPEND ALL TRANSITS – THE STRAITS REMAIN HOSTILE DESPITE THE LULL.** Although the Gulf tanker war has quietened, the Strait of Hormuz, the Bab el-Mandeb and the waters near the UAE remain hostile, and traffic is far below normal. Suspend all transits, hold vessels clear of both straits and the waters near the UAE, and treat the region's waters as hostile until a durable de-escalation is confirmed.
- **Watch the Iran-UAE thaw and the Oman talks.** The Iran-UAE thaw and the Monday Gulf-Iran talks in Oman are the most encouraging developments in weeks and place the UAE at the centre of the emerging diplomacy; watch whether they develop into a durable de-escalation, while holding posture until one is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – Diplomatic Threads Emerging, the Squeeze Persisting

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. Genuine diplomatic threads have emerged – an Iran-UAE thaw, the Oman channel, the Monday talks – but the comprehensive squeeze on Gulf oil persists, the Red Sea front is escalating, and the threads are unproven. Clients should complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the diplomacy closely.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation is confirmed; emerging diplomatic threads amid a severe military situation are not a settlement.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the open airports and the quieter period to finish any deferred departures without delay, on scheduled commercial flights; do not assume the lull will hold.
- **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 the Iran-UAE thaw, the Oman talks, any renewed escalation, and any strike toward UAE territory.
- **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 durable de-escalation from the Oman talks and the Iran-UAE thaw, the lifting of the US blockade, a confirmed ceasefire, and a genuine

reopening of the straits with verified safe passage would allow the alert to come down. The emerging diplomacy is the most promising step in weeks; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.

- **Further escalation – still possible:** A collapse of the diplomacy, a strike on UAE territory, a disproportionate Iranian strike, a further move against Gulf oil infrastructure, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – diplomatic threads emerging but unproven, the comprehensive squeeze persisting; protect people first, complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the Iran-UAE thaw and the Oman talks.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – escalation and diplomacy diverge.** The Houthis have seized the Bab el-Mandeb island and Saudi Arabia's East-West pipeline stays shut, the comprehensive squeeze on Gulf oil persisting. But genuine diplomatic threads have emerged – an Iran-UAE thaw (Pezeshkian and the Abu Dhabi Crown Prince had a "constructive exchange," want to "turn the page"), the Oman channel, and Iran-Gulf talks in Oman on Monday. There is no confirmed strike on UAE territory.
- **WATCH THE IRAN-UAE THAW – THE MOST SIGNIFICANT UAE DEVELOPMENT IN WEEKS.** The Iran-UAE thaw vindicates the UAE's pragmatic engagement and may help insulate it; the UAE is at the centre of the emerging diplomacy, and would be a party to the Monday Oman talks. Watch whether it develops into a durable de-escalation.
- **BUT DO NOT YET READ THE THREADS AS DE-ESCALATION.** The threads are unproven, the Red Sea front is escalating, the pipeline is shut, and the squeeze persists; this war has seen diplomatic progress collapse before. Hold posture until a durable de-escalation is confirmed.
- **COMPLETE DEPARTURES NOW; PROTECT ENERGY AND WATER RESILIENCE.** Use the quieter period to complete deferred non-essential departures on scheduled flights, keep shelter readiness current, and protect energy resilience. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **SUSPEND ALL TRANSITS – THE STRAITS REMAIN HOSTILE DESPITE THE LULL.** The Gulf tanker war has quietened, but the Strait, the Bab el-Mandeb and the waters near the UAE remain hostile. Suspend all transits until a durable de-escalation is confirmed.
- **Monitor for:** (1) the Iran-UAE thaw and the Oman talks; (2) any strike on UAE territory, ports or infrastructure; (3) a renewed escalation or a disproportionate Iranian strike; (4) the Houthi campaign for Bab el-Mandeb; (5) whether the US strikes the Houthis; (6) an Iranian attack on Israel.
- **Escalation and diplomacy diverge – emergency updates to follow.** Westminster Security will issue immediate updates on any breakthrough or collapse in the Iran-UAE thaw or the Oman talks, any strike on UAE territory, any renewed escalation, 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-fifth edition.** Day 198 of the war.

8. KEY POINTS

- **THE FIRST REAL DIPLOMATIC THREADS – AN IRAN-UAE THAW.** Iran's president has reported a "constructive exchange" with the Crown Prince of Abu Dhabi, with both sides seeking to "turn the page" on relations that had deteriorated since the war – a direct Iran-UAE thaw, the most significant UAE development in weeks. It vindicates the UAE's pragmatic engagement and may help insulate it; the UAE is at the centre of the emerging diplomacy.
- **THE OMAN CHANNEL AND THE MONDAY TALKS.** Saudi Arabia has accepted a channel to Tehran through Oman, and Iran is due to meet Gulf states in Oman on Monday to discuss the Strait of Hormuz; Iran has also offered to support Yemen negotiations. The Gulf states are pursuing a negotiated de-escalation, and Iran may be seeking to convert its strategic gains into leverage. These are threads, not a settlement.
- **BUT THE MILITARY SITUATION IS SEVERE – THE RED SEA FRONT ESCALATES.** The Houthis have seized the island in the middle of the Bab el-Mandeb, a physical outpost controlling the strait, and Saudi Arabia's East-West pipeline remains shut (~700,000 bpd lost); the comprehensive squeeze on Gulf oil persists, and the Houthis vow "blockade for blockade." The threads are unproven and set against a severe, escalating military situation; do not yet read them as de-escalation.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE GULF TANKER WAR QUIETENS.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period; the Gulf tanker war has quietened, with only about eight vessels transiting the Strait and no new attacks reported in either strait. The quieter period and the Iran-UAE thaw have reduced the immediate danger to the UAE, though the squeeze persists.
- **OIL AND DIESEL ELEVATED; THE COMPREHENSIVE SQUEEZE PERSISTS.** All major Gulf oil routes remain under threat – Hormuz, the Red Sea coast and mid-strait island, and the shut East-West pipeline – and oil and diesel remain elevated. The emerging diplomacy could ease prices if it progresses, but the squeeze persists. Protect energy resilience and suspend all transits until a durable de-escalation is confirmed.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND EIGHTY-FIFTH EDITION. DAY 198.** Escalation and diplomacy have diverged – an Iran-UAE thaw and Oman talks amid a continued Red Sea escalation and a persisting squeeze – 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, and watch the Iran-UAE thaw and the Oman talks closely. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 13th September 2026 – Information current as of 11:00 GMT

ESCALATION AND DIPLOMACY HAVE DIVERGED. THE MILITARY SITUATION CONTINUES TO ESCALATE – THE HOUTHIS HAVE SEIZED THE ISLAND IN THE MIDDLE OF THE BAB EL-MANDEB, AND SAUDI ARABIA'S EAST-WEST OIL PIPELINE REMAINS SHUT (~700,000 BPD LOST), THE COMPREHENSIVE SQUEEZE ON GULF OIL PERSISTING. BUT GENUINE DIPLOMATIC THREADS HAVE EMERGED, MOST NOTABLY AN IRAN-UAE THAW: PRESIDENT PEZESHKIAN AND THE ABU DHABI CROWN PRINCE HAD A "CONSTRUCTIVE EXCHANGE" AND BOTH WANT TO "TURN THE PAGE."

SAUDI ARABIA HAS ACCEPTED A CHANNEL TO TEHRAN THROUGH OMAN, AND IRAN WILL MEET GULF STATES IN OMAN ON MONDAY. THESE ARE THE MOST HOPEFUL SIGNS IN WEEKS – BUT THEY ARE UNPROVEN, AND THIS WAR HAS SEEN DIPLOMATIC PROGRESS COLLAPSE BEFORE. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE IN THE LATEST PERIOD; THE GULF TANKER WAR HAS QUIETENED. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH THE IRAN-UAE THAW AND THE OMAN TALKS CLOSELY – THE MOST SIGNIFICANT UAE DEVELOPMENTS IN WEEKS – BUT DO NOT YET READ THEM AS DE-ESCALATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-FIFTH EDITION. DAY 198.