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UAE SITREP DOCUMENT

DAY 201 – THE SQUEEZE EASES AT THE MARGINS: THE SAUDI EAST-WEST OIL PIPELINE IS TO RESUME, AND THE SAUDI AIR CAMPAIGN HAS PUSHED THE HOUTHIS BACK FROM BAB EL-MANDEB – EASING TWO OF THE THREE BLOCKED OIL ROUTES; BUT HORMUZ STAYS SHUT (SINGLE-DIGIT TRANSITS), OIL HOLDS NEAR $108, AND THE OMAN TALKS REMAIN STALLED. CENTCOM REFUTES AN IRANIAN SUPERTANKER-MINE CLAIM. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

16 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE COMPREHENSIVE SQUEEZE ON THE REGION'S OIL EXPORTS HAS BEGUN TO EASE AT THE MARGINS, BUT THE CORE BLOCKADE PERSISTS AND THE ALERT REMAINS AT MAXIMUM. Of the three blocked oil-export routes, two are seeing relief: the United States says Saudi Arabia's East-West oil pipeline – its principal route to bypass Hormuz, which was shut after an Iraqi drone strike – is to resume, and the Saudi air campaign has, by two accounts, pushed the Houthis back from the Bab el-Mandeb, easing the threat to Saudi Arabia's Red Sea exports. But the third and most important route, the Strait of Hormuz, remains effectively shut, at single-digit daily transits; oil is holding near $108 a barrel at four-month highs; and the Iran-Gulf talks on the Strait remain postponed with no new date. CENTCOM has refuted an Iranian claim that a supertanker was struck by mines in the Strait. The Iran-UAE thaw stands. 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.

✓ **EASING SIGNALS:** TWO OF THE THREE BLOCKED OIL ROUTES ARE EASING. For the first time in this phase, the comprehensive squeeze on Gulf oil exports is loosening at the margins. Saudi Arabia's East-West pipeline, which had carried rerouted crude to the Red Sea to bypass Hormuz before being shut by an Iraqi drone strike, is to resume, according to the United States – restoring an important export route. And on the Red Sea front, the Saudi air campaign has, by two accounts, pushed the Houthis back from the Bab el-Mandeb, contesting and partly reversing the Houthi advance of the past week and easing the threat to Saudi Arabia's Red Sea oil exports and to the strait. Together with the standing Iran-UAE thaw, these are the first tangible signs that the pressure on the region's energy exports may be easing. They are, however, partial and reversible: the Strait of Hormuz – the largest of the three routes – remains shut, oil is holding near $108, and the multilateral diplomacy is stalled. The easing is real but marginal, and does not yet change the fundamental picture.

⚠ **ASSESSMENT:** THE CORE BLOCKADE PERSISTS – THE ALERT STAYS AT MAXIMUM. The easing at the margins is genuinely encouraging, but it does not change the fundamental picture, and the alert stays at MAXIMUM. The Strait of Hormuz – the route through which the UAE, Saudi Arabia, Iraq and Qatar export the bulk of their oil – remains effectively shut, blockaded and interdicted, at single-digit daily transits; oil is holding near $108 at four-month highs; and the Iran-Gulf talks remain postponed with no new date and a real gap between Iran's terms and the Gulf's. The rogue-hardliner risk identified over the weekend persists, and the Red Sea and pipeline gains are partial and reversible. For the UAE, the easing is a positive – and the UAE can export roughly half its oil through Fujairah, bypassing Hormuz – but the core blockade of the Strait keeps the energy picture tight and the danger elevated. The Iran-UAE thaw remains the most favourable thread for the UAE. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 201 – THE SQUEEZE EASES AT THE MARGINS; HORMUZ STAYS SHUT

The comprehensive squeeze on the region's oil exports has begun to ease at the margins, though the core blockade of the Strait of Hormuz persists and the alert remains at MAXIMUM. Of the three routes through which the region's oil has been blocked or threatened, two are now seeing relief. The United States says Saudi Arabia's East-West oil pipeline – the kingdom's principal route to move crude to the Red Sea and bypass Hormuz, shut last week after an Iraqi drone strike damaged a pumping station – is to resume, restoring an important export route. And on the Red Sea front, the Saudi air campaign has, by two accounts, pushed the Houthis back from the Bab el-Mandeb, contesting and partly reversing the Houthi advance of the past week and easing the threat to Saudi Arabia's Red Sea oil exports. But the third and most important route, the Strait of Hormuz, remains effectively shut, at single-digit daily transits, blockaded and interdicted; oil is holding near $108 a barrel at four-month highs; and the Iran-Gulf talks on the Strait, postponed on Sunday over a lack of Gulf consensus, remain without a new date. CENTCOM has refuted an Iranian claim that a supertanker was struck by mines in the Strait, the latest in a series of disputed Iranian claims. The Iran-UAE thaw reported over the weekend stands. 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.

Where Things Stand

Element	Status (as of 0900 GMT Wednesday 16 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The squeeze eases at the margins, but the core blockade persists. Complete departures; high readiness; suspend all transits.
Saudi pipeline	**TO RESUME.** The US says Saudi Arabia's East-West pipeline (its Hormuz bypass), shut by the Iraqi drone strike, is to resume – restoring an export route.
Bab el-Mandeb	**HOUTHIS PUSHED BACK.** The Saudi air campaign has, by two accounts, pushed the Houthis back from the strait – easing the Red Sea threat.
Strait of Hormuz	**STILL SHUT.** The Strait – the largest route – remains effectively shut at single-digit daily transits, blockaded and interdicted.
Oil	**NEAR $108.** Brent holds near $108 (up 3.2% to $107.94) at four-month highs. Analysts see it falling to $80-85 if the Strait reopens.
Oman talks	**STILL STALLED.** The Iran-Gulf Hormuz talks remain postponed, no new date; Saudi amendments over the Iran-Oman corridor stand. CENTCOM refutes an Iranian supertanker-mine claim.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE. UAE exports ~half its oil via Fujairah, bypassing Hormuz. Airports open.

WS Assessment: The squeeze is easing at the margins – the Saudi pipeline to resume, the Houthis pushed back from Bab el-Mandeb – the first tangible relief in this phase; but the core blockade of Hormuz persists, oil holds near $108, and the multilateral diplomacy is stalled. The alert stays at MAXIMUM with high readiness. The easing is real but partial and reversible; clients should watch whether it broadens to the Strait, while the Iran-UAE thaw remains the most favourable thread.

2. THE SQUEEZE EASES AT THE MARGINS – THE PIPELINE TO RESUME, THE HOUTHIS PUSHED BACK

- **The pipeline to resume:** The United States says Saudi Arabia's East-West oil pipeline – the kingdom's principal route to move crude across the country to the Red Sea and bypass the blockaded Strait of Hormuz – is to resume, having been shut last week after Iran-aligned drones launched from Iraq damaged a pumping station; the restoration of the pipeline restores an important export route and eases one arm of the squeeze on the region's oil exports.
- **The Houthis pushed back from Bab el-Mandeb:** On the Red Sea front, the Saudi air campaign has, by two accounts, pushed the Houthis back from the Bab el-Mandeb, contesting and partly reversing the rapid Houthi advance of the past week that had given the group control of Yemen's Red Sea coast and the mid-strait island; the pressure on the strait and on Saudi Arabia's Red Sea oil exports has eased as a result.
- **Two of three routes easing:** With the pipeline to resume and the Houthis pushed back from the Bab el-Mandeb, two of the three routes through which the region's oil had been blocked or threatened are now seeing relief; this is the first tangible easing of the comprehensive squeeze in this phase, and if sustained would begin to relieve the pressure on the region's energy exports and on oil prices.
- **The Iran-UAE thaw stands:** Together with the easing on the pipeline and the Red Sea, the Iran-UAE thaw reported over the weekend stands, and the broader diplomatic climate – while the multilateral talks are stalled – has not deteriorated further; the combination of the ground easing and the bilateral thaw offers the first signs that the pressure may be beginning to ease.
- **Partial and reversible:** The easing is, however, partial and reversible: the gains on the Red Sea rest on a continuing Saudi air campaign against a Houthi movement that retains its capabilities, the pipeline's resumption has yet to be confirmed as sustained, and the largest route – the Strait of Hormuz – remains shut; the easing is real but marginal, and could be reversed.

WS Assessment: The easing at the margins – the pipeline to resume, the Houthis pushed back from the Bab el-Mandeb – is the first tangible relief in this phase and a genuinely encouraging development; but it is partial and reversible, and does not yet change the fundamental picture. Clients should watch whether the easing is sustained and whether it broadens to the Strait of Hormuz.

3. BUT THE CORE BLOCKADE PERSISTS – HORMUZ SHUT, OIL NEAR $108, THE TALKS STALLED

- **The Strait still shut:** The Strait of Hormuz – the largest of the region's oil-export routes, through which the UAE, Saudi Arabia, Iraq and Qatar export the bulk of their oil – remains effectively shut, at single-digit daily transits, blockaded by the US and interdicted by Iran, which continues to require permission for passage; the easing on the pipeline and the Red Sea does not extend to the Strait, and the core blockade persists.
- **Oil near $108:** Oil is holding near $108 a barrel at four-month highs, up more than 3% early in the week, against roughly $72 before the war; while sell-side forecasts see prices falling to $80-85 if the Strait reopens, the continued closure keeps oil above $100, and the easing at the margins has not yet materially eased the price.
- **The talks stalled:** The Iran-Gulf talks on the Strait, postponed on Sunday over a lack of Gulf consensus – Saudi Arabia's amendments to the proposed Iran-Oman corridor arrangement, and Bahrain's refusal to attend – remain postponed with no new date; the gap between Iran's terms, which include sanctions relief and the release of frozen assets, and the Gulf's, remains real, and the multilateral diplomacy is stalled.
- **A disputed Iranian claim:** CENTCOM has refuted an Iranian claim that a supertanker was struck by mines in the Strait, the latest in a series of Iranian claims disputed by the US; clients should treat Iranian claims of attacks and of control over the Strait with caution, as several have been contested or overstated.
- **The rogue-hardliner risk persists:** The rogue-hardliner risk identified over the weekend – the New York Times report that the July attacks that collapsed the June ceasefire were carried out by hardliners without the leadership's authorization – persists, and remains a wildcard capable of reversing the easing and triggering a renewed escalation; the easing at the margins does not eliminate this risk.

WS Assessment: The core blockade of the Strait persists, oil holds near $108, and the multilateral diplomacy is stalled, so the fundamental picture is unchanged despite the easing at the margins; the rogue-hardliner risk remains. The alert stays at MAXIMUM with high readiness, and clients should not read the marginal easing as a de-escalation.

4. THE UAE; THE IRAN-UAE THAW; THE REGIONAL PICTURE

- **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 Gulf tanker war remains at a lower intensity, and the immediate maritime danger near the UAE remains reduced from its peak.
- **The UAE's Fujairah advantage:** The UAE is able to export roughly half of its daily oil production through its ports in the Fujairah emirate, on the Gulf of Oman, bypassing the Strait of Hormuz – a significant advantage that has insulated the UAE's oil exports from the worst of the blockade, and that distinguishes its position from that of Gulf producers wholly dependent on the Strait.
- **The Iran-UAE thaw stands:** The Iran-UAE thaw reported over the weekend – the constructive exchange between Iran's president and the Crown Prince of Abu Dhabi – stands, and remains the most favourable diplomatic development for the UAE; conducted with Pezeshkian's leadership, it may prove more durable than the stalled multilateral process, and places the UAE in a favourable position.
- **The easing eases the UAE's picture:** The easing at the margins – the pipeline to resume, the Houthis pushed back – is a positive for the UAE and the wider Gulf, easing the pressure on the region's energy exports; but the core blockade of the Strait, and the rogue-hardliner risk, keep the UAE's energy picture tight and the danger elevated, and readiness must be maintained.
- **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, including a rogue hardliner attack. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE has not been struck, its Fujairah exports insulate it from the worst of the blockade, and its bilateral thaw with Iran is a genuine positive; the easing at the margins further eases its picture. But the core blockade and the rogue-hardliner risk keep the danger elevated. Clients should hold high readiness, protect energy and water resilience, build on the thaw, and watch whether the easing is sustained.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **Two of three routes easing, the Strait still shut:** Of the region's three blocked or threatened oil routes, two are easing – the Saudi East-West pipeline to resume, and the Houthis pushed back from the Bab el-Mandeb – but the largest, the Strait of Hormuz, remains effectively shut at single-digit daily transits; the maritime and energy picture is easing at the margins but remains severe.
- **Oil near $108:** Oil is holding near $108 a barrel at four-month highs, with the continued closure of the Strait keeping prices above $100; analysts see prices falling to $80-85 if the Strait reopens, so a broadening of the easing to the Strait would ease prices materially, while a reversal would drive them higher.
- **The Red Sea front turns:** The Red Sea front, which had escalated sharply with the Houthi seizure of Yemen's coast and the mid-strait island, has begun to turn, with the Saudi air campaign pushing the Houthis back from the Bab el-Mandeb; the front remains contested, but the pressure on the strait and on Saudi Red Sea exports has eased.
- **A disputed claim:** CENTCOM has refuted an Iranian claim that a supertanker was struck by mines in the Strait; the waters of the Strait remain hostile, but Iranian claims of attacks should be treated with caution given the pattern of disputed or overstated claims.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports, and no new attack near the UAE; vessels remain anchored off the UAE's east coast at Khor Fakkan, and the UAE's Fujairah ports continue to export oil bypassing the Strait. UAE-linked operators should continue to treat the Strait and the waters near the UAE as hostile and suspend all transits through the Strait.

WS Assessment: The maritime and energy picture is easing at the margins – two of three routes easing, oil potentially set to fall if the Strait reopens – but the core blockade of the Strait persists and oil holds near $108. For UAE-linked operators, all transits through the Strait should remain suspended pending a durable de-escalation and a confirmed, sustained easing.

6. DUBAI AND THE UAE

Operational Picture

- **The squeeze eases at the margins – but the core blockade persists, and no confirmed strike on UAE territory.** The Saudi pipeline is to resume and the Houthis have been pushed back from the Bab el-Mandeb, easing the squeeze at the margins; but the Strait remains shut, oil holds near $108, and the diplomacy is stalled. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The UAE's Fujairah exports and its thaw with Iran keep it in a relatively favourable position.
- **COMPLETE DEPARTURES NOW – THE EASING IS PARTIAL AND REVERSIBLE.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The easing is partial and reversible, the core blockade persists, and a rogue escalation remains possible; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A ROGUE ESCALATION REMAINS POSSIBLE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the easing does not eliminate the rogue-hardliner risk or the core blockade. 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 – OIL NEAR $108.** The Strait remains shut and oil is near $108, though the easing at the margins may begin to relieve the pressure. Protect energy resilience; keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption, though the UAE's Fujairah exports provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT REMAINS SHUT AND HOSTILE.** Despite the easing on the pipeline and the Red Sea, the Strait of Hormuz remains effectively shut and hostile, at single-digit daily transits. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat the Strait as hostile until a durable de-escalation and a confirmed, sustained reopening are in place.
- **Build on the Iran-UAE thaw; watch whether the easing is sustained.** The Iran-UAE thaw remains a positive the UAE should build on, and the easing at the margins – the pipeline, the Red Sea – is encouraging; watch whether the easing is sustained and broadens to the Strait, and whether the Oman talks are rescheduled, while holding posture until a durable de-escalation is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – Easing at the Margins, the Core Blockade Persisting

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The squeeze is easing at the margins – the Saudi pipeline to resume, the Houthis pushed back from the Bab el-Mandeb – but the core blockade of the Strait persists, oil holds near $108, and the diplomacy is stalled. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the easing is sustained.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed, sustained easing are in place; a marginal, reversible easing amid a persisting core blockade is 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 easing 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 whether the easing is sustained, any rescheduling of the Oman talks, the Iran-UAE thaw, a rogue hardliner 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 sustained easing broadening to the Strait, a rescheduling and successful outcome of the Oman talks, progress on the Iran-UAE thaw, the lifting of the US blockade, a confirmed ceasefire, and a genuine reopening of the Strait with verified safe passage would allow the alert to come down. The easing at the margins is a first step; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.
- **Further escalation – still possible:** A reversal of the easing, a rogue hardliner attack, a definitive collapse of the diplomacy, a strike on UAE territory, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – easing at the margins but the core blockade persisting, oil near $108, the rogue-hardliner risk standing, but the Iran-UAE thaw favourable; protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the easing is sustained.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the squeeze eases at the margins, the core blockade persists.** The Saudi East-West pipeline is to resume and the Saudi air campaign has pushed the Houthis back from the Bab el-Mandeb – easing two of the three blocked oil routes; but the Strait of Hormuz stays shut (single-digit transits), oil holds near $108, and the Oman talks remain stalled. CENTCOM refutes an Iranian supertanker-mine claim. The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **WELCOME THE EASING – BUT DO NOT READ IT AS DE-ESCALATION.** The pipeline and Red Sea easing is the first tangible relief in this phase, but it is partial and reversible, and the core blockade of the Strait persists. Watch whether the easing is sustained and broadens to the Strait before easing posture.
- **BUILD ON THE IRAN-UAE THAW; NOTE THE FUJAIRAH ADVANTAGE.** The Iran-UAE thaw remains the most favourable thread for the UAE, and the UAE's Fujairah exports insulate it from the worst of the blockade. Build on both while holding posture.
- **GUARD AGAINST A ROGUE ESCALATION; TREAT IRANIAN CLAIMS WITH CAUTION.** The rogue-hardliner risk persists and could reverse the easing; and CENTCOM has again refuted an Iranian claim. Guard against a rogue escalation, and treat Iranian claims of attacks and control with caution.
- **COMPLETE DEPARTURES NOW; SUSPEND ALL STRAIT TRANSITS.** Use the quieter period to complete deferred non-essential departures on scheduled flights, keep shelter readiness current, and suspend all transits through the Strait. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) whether the easing on the pipeline and the Red Sea is sustained and broadens to the Strait; (2) any rescheduling of the Oman talks and the Iran-UAE thaw; (3) a rogue hardliner escalation or reversal; (4) any strike on UAE territory; (5) an Iranian attack on Israel.
- **The squeeze eases at the margins – emergency updates to follow.** Westminster Security will issue immediate updates on any reversal of the easing, any rogue hardliner escalation, any breakthrough or collapse in the diplomacy, any strike on UAE territory, 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-eighth edition.** Day 201 of the war.

8. KEY POINTS

- **THE SQUEEZE EASES AT THE MARGINS – TWO OF THREE ROUTES EASING.** Of the three blocked oil-export routes, two are easing: the US says Saudi Arabia's East-West pipeline (its Hormuz bypass) is to resume, and the Saudi air campaign has, by two accounts, pushed the Houthis back from the Bab el-Mandeb. This is the first tangible relief in this phase, easing the pressure on the region's energy exports; but it is partial and reversible.
- **BUT THE CORE BLOCKADE PERSISTS – HORMUZ STAYS SHUT.** The Strait of Hormuz – the largest route, through which the UAE, Saudi Arabia, Iraq and Qatar export the bulk of their oil – remains effectively shut at single-digit daily transits, blockaded and interdicted; oil holds near $108 at four-month highs; and the Oman talks remain postponed with no new date. The easing does not extend to the Strait, and the fundamental picture is unchanged. CENTCOM has refuted an Iranian supertanker-mine claim.
- **THE ROGUE-HARDLINER RISK PERSISTS.** The rogue-hardliner risk identified over the weekend – the NYT report that the July attacks that collapsed the June ceasefire were unauthorised by Iran's leadership – persists, and remains a wildcard capable of reversing the easing and triggering a renewed escalation. The easing at the margins does not eliminate this risk; guard against a rogue escalation.
- **THE IRAN-UAE THAW STANDS; THE FUJAIRAH ADVANTAGE.** The Iran-UAE thaw stands and remains the most favourable diplomatic development for the UAE; conducted with Pezeshkian's leadership, it may prove more durable than the stalled multilateral process. The UAE also exports roughly half its oil through Fujairah, bypassing Hormuz – an advantage that insulates it from the worst of the blockade. Build on both.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE UAE'S PICTURE EASES.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE; the Gulf tanker war remains quieter. The easing at the margins, the Fujairah advantage, and the Iran-UAE thaw keep the UAE in a relatively favourable position, though the core blockade and the rogue-hardliner risk keep the danger elevated. Hold high readiness and protect energy resilience.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND EIGHTY-EIGHTH EDITION. DAY 201.** The squeeze is easing at the margins – the pipeline to resume, the Houthis pushed back – but the core blockade of the Strait persists, oil holds near $108, and the diplomacy is stalled; the easing is partial and reversible. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the easing is sustained. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 16th September 2026 – Information current as of 09:00 GMT

THE COMPREHENSIVE SQUEEZE ON THE REGION'S OIL EXPORTS HAS BEGUN TO EASE AT THE MARGINS. OF THE THREE BLOCKED ROUTES, TWO ARE EASING: THE US SAYS SAUDI ARABIA'S EAST-WEST OIL PIPELINE (ITS HORMUZ BYPASS) IS TO RESUME, AND THE SAUDI AIR CAMPAIGN HAS PUSHED THE HOUTHIS BACK FROM THE BAB EL-MANDEB. TOGETHER WITH THE STANDING IRAN-UAE THAW, THESE ARE THE FIRST TANGIBLE SIGNS THE PRESSURE MAY BE EASING.

BUT THE CORE BLOCKADE PERSISTS: THE STRAIT OF HORMUZ – THE LARGEST ROUTE – REMAINS EFFECTIVELY SHUT AT SINGLE-DIGIT DAILY TRANSITS, OIL HOLDS NEAR $108 AT FOUR-MONTH HIGHS, THE OMAN TALKS REMAIN STALLED, AND THE ROGUE-HARDLINER RISK STANDS; THE EASING IS REAL BUT PARTIAL AND REVERSIBLE. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE; THE UAE EXPORTS ~HALF ITS OIL VIA FUJAIRAH, BYPASSING HORMUZ. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WELCOME THE EASING BUT DO NOT READ IT AS DE-ESCALATION; WATCH WHETHER IT IS SUSTAINED AND BROADENS TO THE STRAIT, BUILD ON THE IRAN-UAE THAW, AND GUARD AGAINST A ROGUE ESCALATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-EIGHTH EDITION. DAY 201.