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WORLD

MIDDLE EAST NORTH AFRICA

BULLETIN

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GRAPHIC DESIGN:
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EDITOR'S NOTE

This bulletin covers conflict and security, politics and geopolitics, mining and critical minerals, and energy across the Middle East and North Africa – including Egypt – for the week of September 6–13, 2026, with a deliberate focus this issue on the Yemen war and the Hormuz and Bab al-Mandeb chokepoints, Israel's operations against Gaza, Lebanon and Syria, and Iraq's weapons-control and pipeline crisis. It draws on three distinct source bases: the Mergen open-source news archive, this project's own periodic intelligence summaries (used as a starting point and re-sourced against Mergen and named outlets wherever possible), and the Enerji project's Yahoo Finance-derived commodity feed for all energy and metals pricing, in preference to the price series embedded in the periodic summaries themselves. Conflict mapping draws on ACLED, both this project's own local archive and ACLED-attributed figures already published in the week's underlying reporting; ACLED's standard one-to-two-week coding lag applies throughout but, per the brief for this issue, is noted once here rather than repeated in the text.

Sourcing discipline follows a single rule applied consistently throughout: a claim whose only attribution was a Telegram channel, an OSINT aggregator or tracker account, or a similar informal source is presented here as “according to open sources,” never under the channel's own name and never re-attributed to a named news organisation that did not in fact report it. Claims from wire services, major newspapers, broadcasters, official bodies (the UN and its agencies, the IAEA, the IEA, ACLED, CENTCOM, national governments) and named financial institutions are attributed to those organisations directly. Where a party is describing its own actions – a Houthis, Israeli military or Iraqi militia statement, for instance – that is treated as a primary-source claim and attributed to the party itself, flagged as unverified where no independent corroboration was found. Three of this issue's most consequential claims – the fall of Perim Island, the Saudi pipeline strike, and the destruction of Hezbollah's Ali al-Taher tunnel

complex – were separately cross-checked against Mergen's own archive and are described here as confirmed rather than merely reported, in line with that standard.

Two limitations are worth flagging directly rather than leaving implicit. First, this project's local ACLED archive does not currently track Yemen, Syria, Egypt, or Israel/Palestine as a combined entry, or Turkey; the conflict-mapping section therefore relies on ACLED figures already cited within the week's own reporting for those specific countries, a secondary rather than a primary pull, and should be read with that caveat. Second, despite a direct search of both the periodic summaries and the Mergen archive, no report could be found this week of a specific handover of weapons by Iraq's Sinjar Resistance Units (YBS) to the Iraqi army, a story requested for this issue; rather than fabricate that development, this bulletin documents the closely related, well-sourced story that could be verified – the state's broader, contested effort to bring Iran-aligned Shia factions' weapons under central command – and notes the gap explicitly in Section 2. Readers should treat any single-source or single-fighter claim flagged as such in the text below as exactly that, regardless of how consequential it sounds.

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Levent Kemal

Executive Director, MINTEL WORLD





CONF- LICT AND WAR OVERVIEW

SEC.2

YEMEN AND THE COLLAPSE OF THE RED SEA FRONT.

Fighting on Yemen's western coast, which had simmered for months, re-erupted sharply from September 3, with the International Organization for Migration recording roughly 18,500 people displaced within 72 hours across Taiz and Al Hudaydah governorates. By September 5–6, government-aligned forces claimed counter-offensive gains in Taiz and Al Hudaydah, while open-source military analysts offered a contrasting reading, suggesting Houthi forces were in fact advancing and that government claims of air support were implausible given Sanaa's forces lack of aircraft. The UN Special Envoy for Yemen, Hans Grundberg, warned as early as September 6 that the escalation was "extremely alarming" and risked expanding the conflict.

The decisive shift came on **September 10**, when Ansar Allah forces took the Red Sea port city of Mocha after Saudi-backed Presidential Leadership Council (PLC) units withdrew toward Lahj; commander Tareq Saleh ordered his troops to regroup around an alternative command centre. Ansar Allah's Supreme Political Council said it had halted clashes on the coast and declared Red Sea navigation safe for all shipping except Saudi-flagged vessels – a carve-out signalling an intent to use the position as leverage rather than to close the strait outright. Reuters, citing three Yemeni government sources, confirmed the loss of Mocha. Two further claims that day, the "liberation" of Zuqar Island (corroborated by AFP's military source) and a landing on Mayyun (Perim) Island (disputed – described by one open-source tracker as a probing operation rather than a capture), remained contested.

By **September 11**, the picture had clarified: Ansar Allah pushed south from Mocha, took Dhubab without significant resistance, and then seized Mayyun/Perim Island itself – the strait's narrowest point. This was confirmed by official sources: a Yemeni government official and eyewitnesses cited by AFP, and separately by Yemeni government officials cited by CNN and Al Jazeera, all confirmed the loss of the island. Fi-

ghting for Zuqar Island continued in parallel. An Israeli official told Channel 12 that Houthi control of the strait posed a greater practical threat to shipping than the Hormuz standoff, since vessels passing Mayyun Island are within visual range and can be targeted with unguided weapons, requiring no radar or targeting systems. The Yemeni Armed Forces (Houthi-aligned) declared the "successful end" of an offensive it named "God Is Strongest in Might and Punishment," claiming control of 5,400 square kilometres of coastline; this figure has not been independently verified. The UN Security Council was briefed by Grundberg, who said the country had entered "a new and more dangerous phase" of war, with roughly 11,400 families displaced by the latest fighting alone.



By **September 12–13**, the Houthi position had hardened into a fait accompli. Ansar Allah conducted its first-ever naval patrols inside Bab al-Mandeb. Egypt said the disruption to navigation had already cost the Suez Canal \$11 billion in lost transit revenue, with vessels that once transited the Mediterranean-to-Arabian-Sea route in about four days now taking roughly 34-day detours around Africa.

A CNN account of the fall of Al-Mokha attributed the collapse to a hollowed-out defending force – a Western source told the network the army’s actual fighting strength was roughly 20% of its official payroll, the rest consisting of fictitious names used to draw salaries – and to a total failure of political leadership among Yemen’s fractured opposition camp.

An Ansar Allah fighter framed the moment as a joint achievement with Iran, saying the key to Hormuz now rests with Iran while the key to Bab al-Mandeb rests with Yemen’s forces; this is the claim of a single fighter, not a verified operational reality, but the underlying territorial facts (the fall of Mocha and the capture of Perim) are consistent across independent sourcing.

Riyadh’s response has been calibrated rather than direct. Crown Prince Mohammed bin Salman telephoned President Trump twice on September 11 urging direct US strikes on the Houthis; Trump declined both times, offering intelligence and targeting support instead through roughly 200 US personnel and a visit by CENTCOM commander Adm. Brad Cooper to Saudi Arabia.

According to open sources citing CNN reporting, American officials believe hundreds of Islamic Revolutionary Guard Corps officers are inside Yemen working alongside Ansar Allah, and two Iranian sources told Reuters that Tehran had instructed the Houthis to escalate against Saudi Arabia and promised additional funding and weapons, even as Iran’s Foreign Ministry publicly maintained that Ansar Allah “is an independent Yemeni actor that makes its own decisions.” In a striking parallel track, Middle East reporting relayed through the same channels said Mohammed bin Salman had quietly invited an Iranian delegation, reportedly including parliament speaker Mohammad Bagher Ghalibaf and Foreign Minister Abbas Araghchi, to visit Riyadh to discuss both the Yemen war and the Hormuz standoff – a sign Saudi Arabia may be hedging toward direct engagement with Tehran even as fighting continues on its southern border.

Ansar Allah’s own political bureau has continued to frame the offensive as connected to the wider Gaza and Lebanon fronts, accusing Israel of continuing “assassinations” and ceasefire violations in Gaza “with direct American support,” and mourning the death of Mohammed Abdulsalam al-Yazouri, commander of its Khan Younis brigade, in a separate Israeli strike.



THE STRAIT OF HORMUZ: US-IRAN NAVAL COMBAT

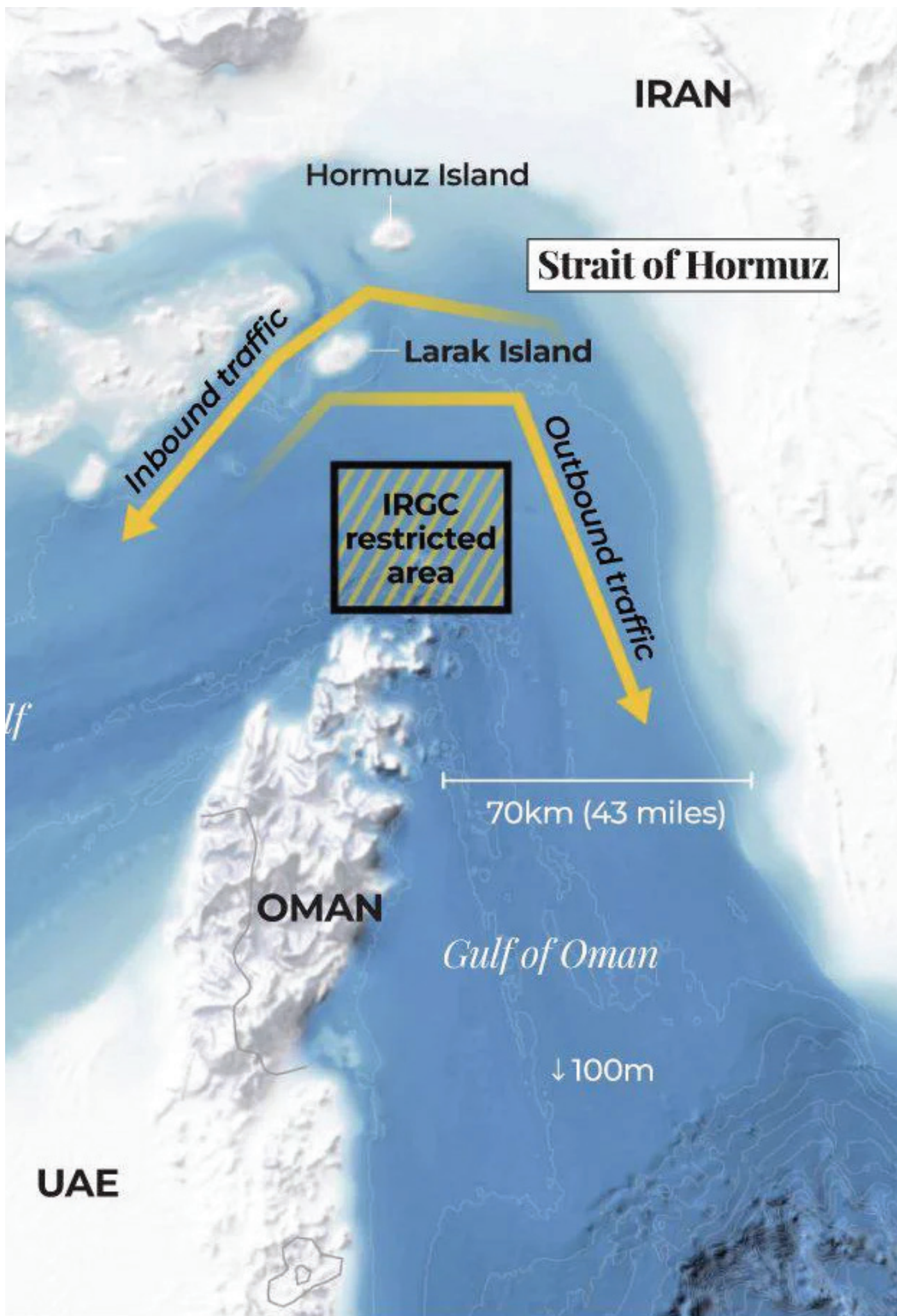
On the evening of **September 5**, US Central Command struck three Iranian crude tankers (M/T Downy, M/T Stark 1, M/T Kylo) after Iran's Revolutionary Guard Corps (IRGC) fired ballistic missiles at two US Navy vessels – an aircraft carrier and an Arleigh Burke-class destroyer – both of which evaded the fire without casualties, CENTCOM said. The IRGC Navy responded within hours, claiming strikes on three further tankers and three US-linked vessels, and releasing footage of kamikaze-drone hits on shipping. The exchange marked the sharpest test of a ceasefire framework, referred to in wire reporting as the Islamabad memorandum of understanding, that had held for roughly a month.

The confrontation escalated through the following days. By **September 8–9**, CENTCOM said it had destroyed a total of ten Iranian tankers over the preceding week, including the M/T Derya, M/T Horizon 1, M/T Kaviz, M/T Charminar and M/T Riesco. Iran's response, delivered in three escalating statements from its Aerospace Force, claimed a barrage of 30–40 ballistic missiles against US air bases in Jordan (Muwaffaq Salti and Prince Hassan, hitting F-35/F-16/F-15 maintenance hangars), a strike on the destroyers USS Delbert D. Black and USS John Paul Jones, and a combined operation against two US vessels and eighteen commercial ships in the strait. Shipping data from Kpler showed the effect on the water directly: transits fell to a ten-day average of roughly ten vessels a day, the lowest since May, with as few as two vessels crossing on a single day in early September.

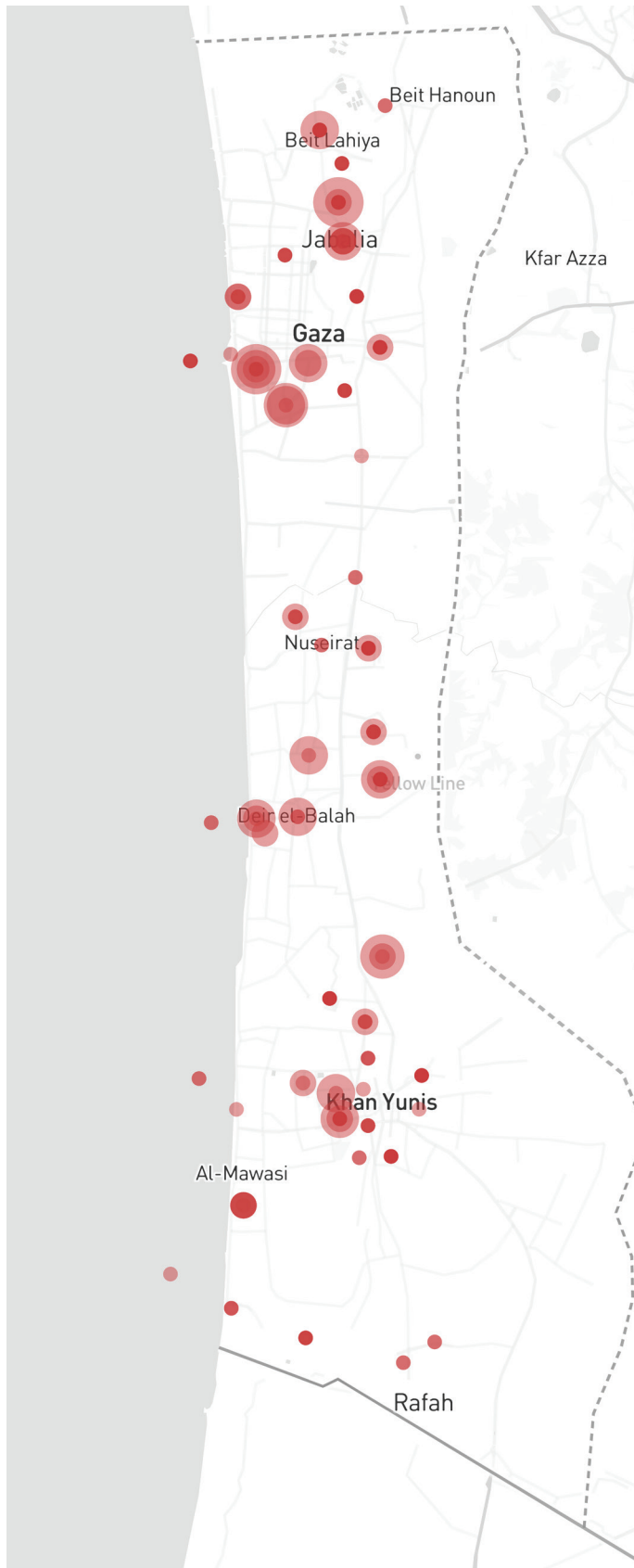
Iran moved in parallel to formalise unilateral control over the waterway. Supreme National Security Council Secretary Mohsen Rezaei said Tehran expected to announce a new, Iran-controlled shipping corridor, alongside a parallel restricted zone barring vessels it deems unauthorised, and rejected President Trump's public claim that the strait remained open as "a great lie." By **September 10–11**, the IRGC Navy said it had destroyed a US Saildrone Explorer uncrewed surface vessel near the strait's entrance and separately claimed capture of a US Dive-LD

autonomous underwater drone, a capture that defence analysts said could let Iran reverse-engineer parts of the system, echoing its 2011 handling of a captured RQ-170 stealth drone. UKMTO confirmed vessels struck near Khasab, Oman, and Iranian state media reported explosions near Qeshm Island; one attack there on **September 13** killed one crew member and injured three others aboard an Iranian commercial vessel, according to Qeshm's governor.

Diplomatically, Oman has positioned itself as the principal broker. By **September 11–12**, Bloomberg and the Financial Times reported that Oman was convening a rare meeting of Gulf Cooperation Council and Iranian foreign ministers in Salalah – the first GCC-level engagement with a senior Iranian official since the war began – to discuss a proposed safe-navigation corridor. A source close to the talks described a framework under which the inbound route would run entirely through Iranian territorial waters, with Gulf states and Iraq briefed on but excluded from the technical decisions; Iran has presented Washington with seven conditions for reopening the strait and says it will remain closed until they are met. Iran's Foreign Ministry cautioned publicly that any Oman-brokered understanding "does not necessarily mean the strait is safe for navigation." President Trump, for his part, said in a Fox News interview that the United States, not Iran, now controls Hormuz, citing the escorting of 22 vessels out of the strait overnight, and said he expects the war to end only after November's midterm elections. On the nuclear file, the IAEA Board of Governors voted on September 9 to refer Iran's file to the UN Security Council over non-compliance with inspections (23 in favour, three against – Russia, China and Niger – eight abstentions); Iran, Russia and China issued a joint statement at the same session condemning Israeli strikes on Syria. Iran's Foreign Ministry said Sunday, September 13, that US and Israeli attacks on its nuclear facilities were the principal reason it had refused IAEA access to some sites, formalising what had previously been an informal restriction. Iran's economic toll has become acute: the Wall Street Journal reported not a single Iranian crude shipment cleared the Persian Gulf since the naval blockade resumed in mid-July, with floating storage falling from 90 million to 29 million barrels; the rial has repeatedly hit new record lows against the dollar through the week, and Tehran has twice raised petrol prices for its heaviest consumers.



GAZA



The Gaza ceasefire, agreed under the Sharm el-Sheikh framework, held in name only throughout the week. A Hamas political bureau official, Bassem Naim, said on September 11 that nine people had been killed in Gaza since dawn that day alone and put cumulative deaths since the ceasefire at roughly 1,400, with more than 4,500 wounded. The UN High Commissioner for Human Rights separately said Israel had killed more than 1,300 Palestinians in Gaza despite the ceasefire. Reported strikes through the week included attacks on Al-Tuffah, Al-Mawasi, Al-Qarara, Jabalia camp and Tal al-Hawa, several killing or wounding children; the Israeli military said individual strikes targeted Hamas figures it accused of rebuilding capability “in systematic violation of the ceasefire,” including the killing of Farah Hamed (a prisoner released under the 2011 Shalit exchange), Ismail Kandil (linked to the October 7 killing of a Nahal Brigade commander), and Muhammad Abdul Salam Al-Yazouri (commander of Hamas’s Khan Younis Brigade). Turkey’s Defence Ministry put the toll from Israeli strikes in Lebanon since March 2 at more than 4,300 dead; UNICEF’s Lebanon situation report separately recorded 4,333 conflict deaths and 12,242 injuries as of July 31, including 253 children killed.

A significant domestic story broke mid-week concerning the run-up to October 7, 2023: a Haaretz investigation, and separately sourced Israeli security-official accounts, reported that UAE President Mohammed bin Zayed had warned Prime Minister Netanyahu roughly ten to eleven days before the attack that Hamas was preparing a major operation, and that Netanyahu did not pass the warning to the military or Shin Bet. Netanyahu said he would sue Haaretz for libel over the report, which the UAE has not denied. Officials separately said Egypt had passed a warning to Shin Bet weeks earlier that Hamas intended to “create an earthquake,” initially misread as relating to a different hostage case, and that the security establishment had repeatedly flagged the unresolved prisoner-exchange issue to Netanyahu as “an open file.”

Diplomatically, eight Arab and Muslim-majority states (Egypt, Turkey, Saudi Arabia, Qatar, the UAE, Jordan, Indonesia and Pakistan) issued a joint condemnation of remarks by Israeli ministers Itamar Ben-Gvir and Yisrael Katz over renewed calls for displacement of Gaza’s population, warning of “serious consequences” if displacement hardens into policy; Ben-Gvir

was separately reported to have unveiled a plan termed “Disengagement 710” for a phased, seven-year removal of Gaza’s population, which critics describe as ethnic cleansing. The United Kingdom banned imports of goods from Israeli West Bank settlements on September 8, a step France and Canada echoed with parallel statements; Israeli Finance Minister Bezalel Smotrich called for the British ambassador’s expulsion in response, and the US ambassador to Israel accused Britain’s foreign secretary of antisemitism over the policy. Nickolay Mladenov, the Board of Peace’s high representative for Gaza, said continued stagnation combined with West Bank settler violence was making a two-state solution “practically impossible.” Israel’s own election calendar hardened around the crisis: candidate slates for the October 27 Knesset election were finalised mid-week, with opposition leader Yair Golan pledging to end the wars with Iran and elsewhere if his bloc wins.

LEBANON: CEASEFIRE IN NAME ONLY

Israeli strikes on southern Lebanon continued at a near-daily tempo despite the ceasefire reached in June. Early in the week (September 5–7), strikes on Nabatieh, Nabatieh al-Fawqa, Kfar Rumman and surrounding towns killed at least 27–29 people over 48 hours, including infants, paramedics and, in one case, a journalist and cameraman injured live on air; the Israeli military said strikes targeted Hezbollah weapons depots, infrastructure and a command centre inside the disused Gandour Hospital, which Lebanese reporting described as demolished. Parliament Speaker Nabih Berri accused Israel of turning south Lebanon into “a ballot box of blood” ahead of its own elections and called the pattern “state terrorism.” President Joseph Aoun repeatedly called on Washington and the international community to intervene, and made a surprise visit to Nabatieh on September 12–13, saying flatly that “there will be no new negotiations with Israel at the moment.”

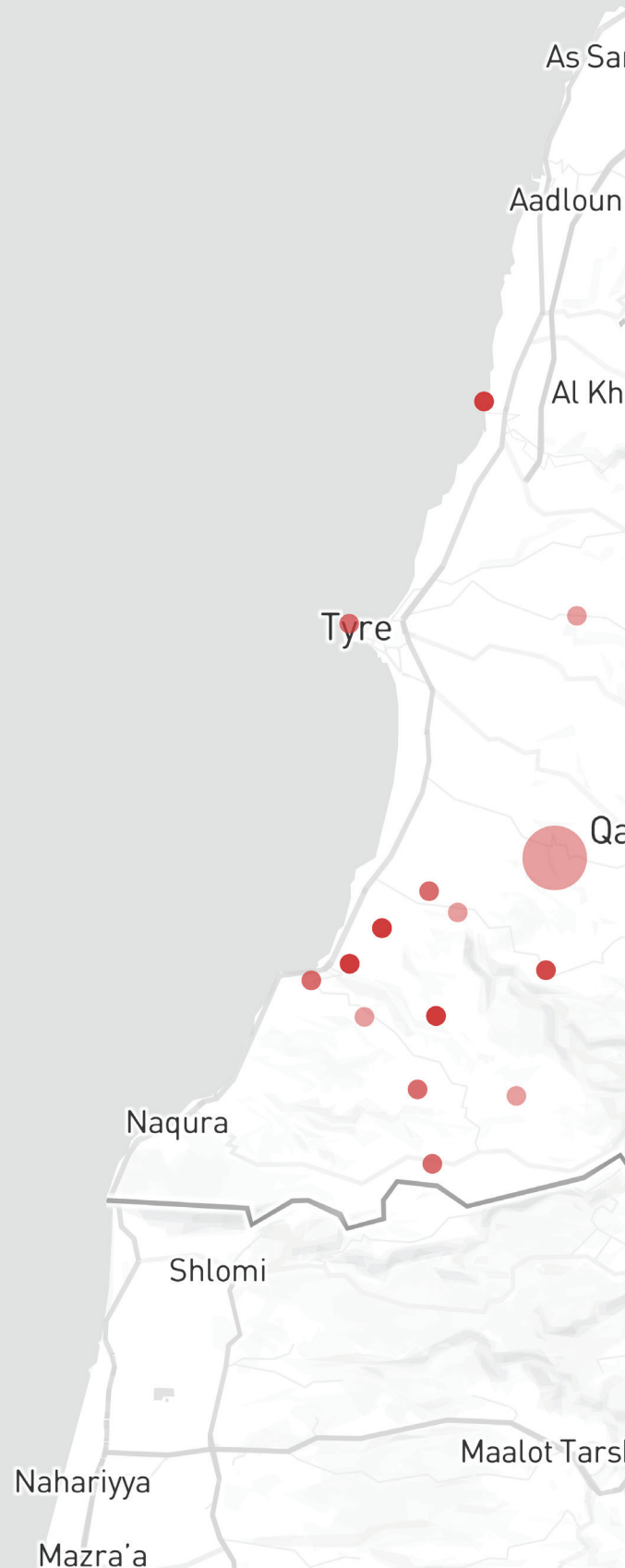
The central set-piece of the week was the destruction of Hezbollah’s underground complex beneath the Ali al-Taher ridge, completed around **September 11** and subsequently confirmed by the Israeli military itself: it said roughly 1,100 tonnes of explosives were used to destroy more than two kilometres of tunnels housing the group’s Badr Unit command centres, weapons storage and living quarters, along with Iranian-supplied rockets, missiles and anti-tank weapons. Around

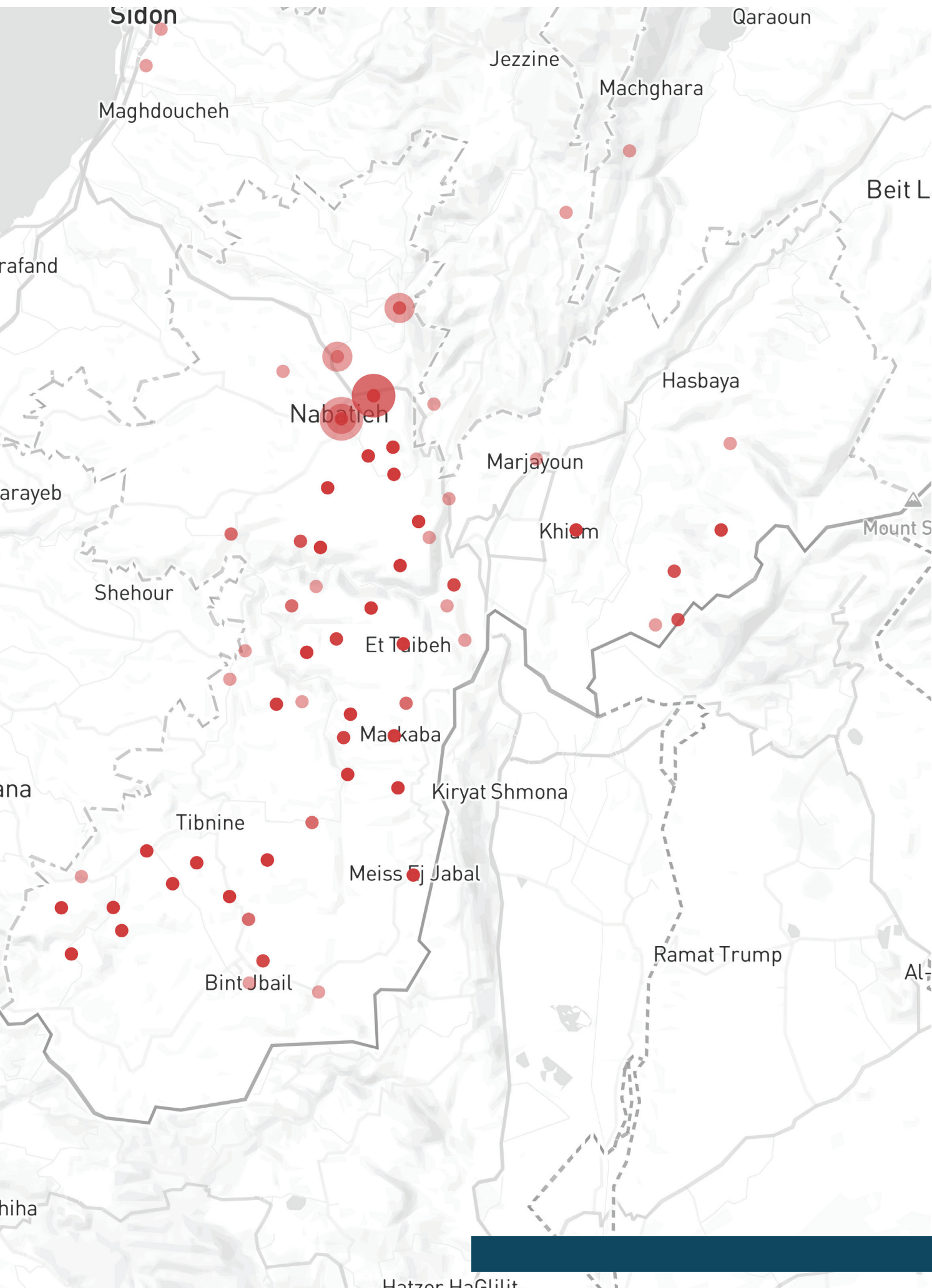


50 Hezbollah operatives were reportedly killed after refusing an offer to surrender. Netanyahu and Defence Minister Israel Katz called the site “strategic infrastructure built over two decades with Iranian funding.” Israeli forces subsequently withdrew from the ridge to positions around Beaufort, saying they would maintain the area through remote fire and surveillance rather than physical occupation.

Human Rights Watch and Harvard Law School’s International Human Rights Clinic published a 45-page report during the week documenting 23 instances of Israeli forces using white phosphorus munitions in south Lebanon between March and May, calling for the incendiary-weapons protocol of the 1980 Convention on Certain Conventional Weapons to be tightened. A retired senior Lebanese army officer and longtime Hezbollah defender, Hisham Jaber, said publicly on air that the group’s decision to open a “support front” against Israel on October 8, 2023 “was folly” – a notable public crack in previously unassailable internal support for that decision.

Negotiations between Israel and Lebanon over a verification mechanism for Hezbollah’s disarmament made no visible progress: an eighth round of talks, expected in Rome, was postponed to October, with US officials citing the need for further preparation; Lebanon’s army has reportedly told American mediators it is ready to take over Hezbollah facilities in the south but that Hezbollah has refused to hand them over.





SYRIA: SECURITY SITUATION

Israel carried out repeated incursions into southern Syria through the week. Prime Minister Netanyahu visited the summit of Mount Hermon inside Syrian territory on two occasions (an earlier visit in November 2025 and again this period), declaring “unprecedented total control” from the Hermon summit “to the Yarmouk river and on to the Mediterranean” and naming the defeat of Iran’s government as Israel’s remaining central objective. Syria’s Foreign Ministry condemned each visit as a violation of sovereignty and of the 1974 disengagement agreement. On September 13, Israeli tanks, a bulldozer and more than ten military vehicles entered the Beit Jann farming area in the western Damascus countryside, forcing farmers to abandon their fields, before withdrawing toward the Red Hills area; separate shelling struck farmland near Ain al-Shaara. Israeli forces also shelled areas near

Rafid, Al-Mashaa’la and Maariyah in Quneitra and Daraa provinces through the week, part of a continuing pattern Syrian sources link to monitoring of the Golan frontier.

Syria’s diplomatic response has increasingly leaned on multilateral solidarity rather than bilateral pressure: a gathering of roughly 40 UN member-state representatives in New York, joined by Syria’s own envoy, condemned Netanyahu’s Mount Hermon movements, and Damascus separately thanked the international community for the speed of its backing. A domestic security incident also surfaced mid-week: a prison uprising at the Ain al-Arab (Kobani) facility in the Aleppo countryside left seven to eight inmates dead and dozens injured after prisoners set fires during a resisted transfer; the facility remains under its former administration inherited from the dissolved Syrian Democratic Forces and has not yet been formally handed to the interior ministry, a jurisdictional gap that appears to have contributed to the breakdown in order.





IRAQ: MILITIA QUESTION

On **September 11**, drones struck multiple pumping stations along Saudi Arabia's East-West pipeline (Petroline), the 1,200-kilometre, roughly 5–7 million barrel-per-day conduit that had become Riyadh's principal remaining alternative to shipping crude through Hormuz. The strike and the resulting pipeline shutdown were subsequently confirmed by Saudi Arabia's own government; satellite imagery reviewed by open sources, including analysts tracking thermal anomalies, showed fire damage at pumping stations near Medina, and CNN, citing two US officials, reported the drones were launched from Iraq's Maysan province, near the Iranian border. Saudi Arabia's Foreign Ministry confirmed the Iraqi origin and said the strike "demonstrated the involvement of an Iranian-backed non-state actor," while stating Riyadh retains the right to respond but was, for now, deferring to Baghdad.

Iraq's government moved quickly to contain the political fallout. Prime Minister Ali al-Zaidi, acting as commander-in-chief, dismissed the Maysan provincial police chief and the province's military operations commander, ordered an investigation into the province's security-agency directors, and closed border crossings with Iran (later reopened, according to open sources, once the immediate security response eased). Iraqi President Nizar Amidi said Iraq "does not accept the use of its territory or airspace as a launchpad for attacks on neighbouring states." Armed factions operating under the banner "Islamic Resistance in Iraq" denied any role, calling the accusation "an honour we do not claim" while voicing solidarity with Houthi gains in Yemen and offering to join any investigating committee. Kuwait, Syria, Egypt and Lebanon all issued statements of condemnation and solidarity with Saudi Arabia.

The episode sharpened a long-running dispute inside Iraq over state control of weapons held by Iran-aligned Shia factions. Through the preceding weeks, Iraqi factions had proposed a weapons "freeze" in place of actual disarmament, even as the army publicly reaffirmed its intent to bring "all weapons under state control" and one faction handed over a small quantity of drones and a missile to the government as a gesture. The US Treasury separately sanctioned 14 individuals and five entities in mid-September that it said were moving hundreds of millions of dollars from the Revolutionary Guards to Hezbollah in Lebanon and Kata'ib Hezbollah in Iraq, describing a network of exchange houses and front companies spanning Iraq, Lebanon, Syria, Turkey and the UAE. *Note on sourcing: this bulletin found no confirmed report in the reviewed sources of a specific handover of weapons by the Sinjar Resistance Units (YBS) to the Iraqi army during this reporting week; the broader, well-documented story is the state's contested effort to bring Shia Hashd factions, not the Yazidi YBS specifically, under central command.*



Klawe Rze

POL- ITIC AND DIPLO- MACY

OVERVIEW

SEC.3

Diplomacy this week ran on at least four parallel, only loosely coordinated tracks: Oman's effort to broker a Hormuz shipping arrangement (detailed in Section 2); a stalled Israel-Lebanon negotiating process now pushed to October; the BRICS summit in New Delhi; and Syria's own accelerating diplomatic normalisation with the Gulf.

At the **BRICS summit** (New Delhi, concluding September 12–13), the eleven-member bloc reached a joint communique after talks that reportedly ran into the early hours, reflecting the difficulty of bridging positions among members including Iran, Saudi Arabia and the UAE. The declaration expressed “deep concern over the continued escalation of tensions in the Middle East/West Asia,” called for “maximum restraint,” affirmed commitment to Syria's sovereignty and territorial integrity, called on Israel to withdraw from Lebanese territory and abide by its understandings with Beirut, rejected unilateral changes to the status of Jerusalem, and demanded an immediate ceasefire in Sudan. Chinese President Xi Jinping urged BRICS to take on a Middle East peacemaking role, and Russian Foreign Minister Sergei Lavrov and Iranian Foreign Minister Abbas Araghchi were seen together on the sidelines – a visible marker of Moscow-Tehran-Beijing coordination during the Gulf standoff. Notably, the joint statement made no mention of Ukraine. Turkey positioned itself through the week as an interlocutor rather than a party to the Gulf crisis: Foreign Minister Hakan Fidan held calls with his Iranian counterpart on the Hormuz file and the Saudi pipeline attack, while separately condemning the pipeline strikes and praising what it called Saudi Arabia's restraint. Pakistan urged Iran to use its influence over the Houthis to halt attacks on Saudi Arabia, warning of a broader regional crisis; Tehran's public reply was that it “does not control the Houthis,” even as separate Iranian sourcing to Reuters indicated the opposite in practice (see Section 2). A Saudi request for Pakistani military support under the Mecca Pact was declined, Islamabad arguing the mutual-defence agreement covers state actors and post-signature conflicts, not a pre-existing Houthi threat. Egypt, Turkey, Saudi Arabia, Qatar, the UAE, Jordan, Indonesia and Pakistan repeated, in a second joint statement mid-week, their earlier condemnation of Israeli displacement rhetoric on Gaza and welcomed the UK's settlement-goods ban, calling on the wider international community to adopt similar measures.

SYRIA RE- CON- STRUC- TION OVERVIEW

SEC.4

Syria used the week to convert improving regional relations into concrete economic commitments, even as the domestic picture remains markedly uneven. Damascus and Doha launched a new economic partnership covering tourism, hospitality, real estate, energy, infrastructure and sustainable development; a separate Syrian foreign ministry delegation toured Kuwait, the UAE and Saudi Arabia to review national recovery priorities and financing, including talks with the Kuwaiti Fund for Arab Economic Development, while Syria's civil aviation authority met Saudi counterparts in Riyadh on air-link expansion. The 63rd Damascus International Fair drew more than 1.4 million visitors, with contracts and memoranda its director said exceeded \$1 billion in value – though separate commentary cautioned that investment-conference announcements have yet to translate into the factories and jobs ordinary Syrians are waiting for.

On the Kurdish file, integration of the dissolved Syrian Democratic Forces into state institutions accelerated in Hasakah and the Kobani area following pressure from President Ahmed al-Sharaa over the pace of the process; SDF official Ilham Ahmad said the file had entered “a new political phase” focused on securing Kurdish constitutional rights alongside completing the security-institution merger. Al-Hasakah's deputy governor said three tracks – military/security, administrative/civil, and a remaining unspecified third – still need resolution before integration is locally complete. The fragility beneath that process was visible on the ground: deadly tribal clashes in Hasakah killed two young men and burned homes, prompting calls for authorities to intervene, and the Kobani prison uprising described in Section 2 exposed a jurisdictional gap left by the SDF's dissolution.

Economically, Syria's central bank formally ended the legal-tender status of the old pound on July 31 as part of the currency transition, and separate analysis this period argued Syrian unemployment has hardened into a structural problem rooted in collapsed productive capacity and capital/labour flight rather than a simple skills mismatch. The scale of the reconstruction gap is stark: Syria imports 62.5% of the roughly 8 million tonnes of cement it consumes annually against about 3 million tonnes of domestic production, and the energy ministry's water-sector regulator described a national water deficit of roughly 2 billion cubic metres, with dam reservoirs below 50% of capacity. Security incidents

continued in parallel – a shooting inside the Latakia courthouse killed one person and wounded a police officer, and authorities in Aleppo and Idlib announced an emergency canal-winterisation plan ahead of the rainy season. Syria's UN standing improved procedurally as well: its Human Rights Council file moved from the fourth agenda item (reserved for states under scrutiny for systematic violations) to the second, which Syria's envoy described as reflecting "a genuine break" from the previous government's record, citing recent convictions of senior former officials – even as the UN's own Commission of Inquiry raised concern in the same period over continued Israeli incursions in Quneitra and Daraa.





ENER- GY AND SHIP- PING

OVERVIEW

SEC.5

OIL MARKETS: A WEEK ABOVE \$100

Brent crude began the week near \$96/bbl (September 5–6) and closed a full week above the \$100 mark for the first time since mid-May, a weekly gain approaching 13%.

US retail diesel crossed \$6 a gallon for the first time on record during the week, a threshold directly tied to reduced Hormuz throughput and the loss of Saudi pipeline capacity; US retail gasoline separately set a Labor Day-period record near \$4.03–4.14 a gallon earlier in the period. Basra Heavy crude, a more direct proxy for Gulf physical supply risk than the international benchmarks, closed the week at \$96.11/bbl, up 16.27% for the week – a far sharper move than Brent or WTI, reflecting how much more aggressively regional export grades are pricing the disruption than futures markets. Forecasting houses diverged sharply on how long the shock will last: Goldman Sachs has warned Brent could reach \$120 if Gulf shipping disruption broadens; HSBC put its average 2026 Brent forecast near \$90; Bank of America flagged an outside scenario of \$150 if energy infrastructure sustains major damage. The IEA cut its 2026 global oil demand growth forecast to a decline of 2.5 million barrels a day (from a prior 1.6 million), citing the impasse in US-Iran talks explicitly, and separately raised the priority of progress on both the Middle East and Ukraine conflicts as “greater than ever” for easing market tightness.

Saudi Aramco’s Jizan energy facilities were struck twice within roughly five weeks: an early-August strike shut the 400,000 bpd Jizan refinery for repairs, and a second Houthi strike on September 8 left the refinery ablaze and out of service again, visible burning from the city itself, alongside strikes on Aramco storage and distribution infrastructure near Abha, Khamis Mushait and Najran that wounded at least 73 people.

Both the Wall Street Journal and the New York Times identified the Jizan strikes as the immediate trigger for oil’s push toward \$100 that week. Saudi Arabia’s East-West pipeline (Petroline), the kingdom’s main overland alternative to Hormuz, was itself struck on September 11 by drones traced to Iraq’s Maysan province (Section 2), with satellite imagery showing fire damage at pumping stations near Medina; the line’s shutdown left Riyadh simultaneously squeezed at both ends of its export map, with Saudi crude output already down 23% in August to 6.24 million bpd – its lowest level since 1990 – and exports at roughly 3–3.2 million bpd, a 13-year low. On the Ukraine-Russia front, Ukrainian strikes hit Russian refineries at Ryazan, Perm, Saratov, Slavyansk-na-Kubani and Taneco (Nizhnekamsk) through the week, part of a sustained campaign against Russian refining capacity that is contributing separately to the global diesel and marine-fuel squeeze described below.

SHIPPING, FREIGHT AND WAR-RISK INSURANCE

The physical cost of moving oil has risen far faster than headline crude prices. Per Bloomberg figures cited in this week’s reporting, the cost of chartering oil tankers has roughly tripled since the war against Iran began, with daily supertanker income rising from \$218,000 to \$786,000; supertanker charter rates hit a record on the Reuters-tracked index (roughly 450 points, equivalent to about \$11.5 per barrel of freight cost). Marine fuel oil, the product ships and power plants depend on, has risen 76% since the conflict began, forcing Nigeria’s Dangote refinery to cut fuel-oil exports in favour of petrol, diesel and jet fuel. Saudi Arabia and Kuwait have moved to insulate shipping directly: Riyadh established a marine war-risk insurance pool, and Kuwait, Qatar, the UAE and Iraq are all now offering

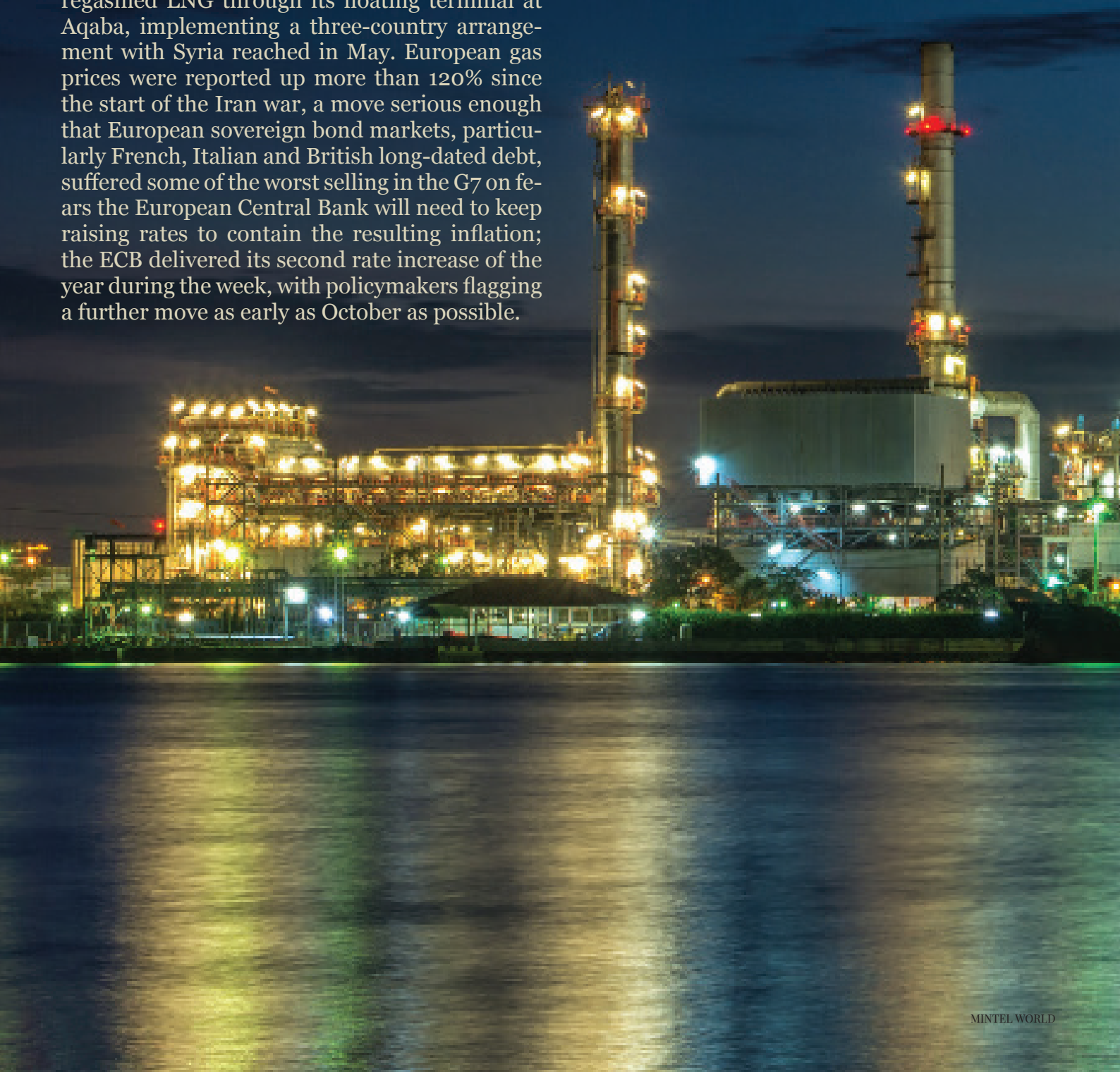
Date	Brent (\$/bbl)	WTI (\$/bbl)	Henry Hub (\$/MMBtu)	Note
Sep 4	96.28	91.48	2.97	Pre-escalation baseline
Sep 8	97.58	92.46	2.87	Houthi-Saudi (Jizan) strikes
Sep 9	101.16	96.35	2.86	Brent closes + \$100 for first time since July
Sep 10	106.60	101.21	2.79	Hormuz + Red Sea disruptions compound
Sep 11 (intraday high)	109.97	~103	2.83	Highest Brent level in four months
Sep 11 (settle)	104.80	99.41	2.81	Possible Oman-brokered Hormuz de-escalation
Sep 12–13	104.61	100.05	2.83	Saudi pipeline strike and Bab al-Mandeb crisis

ship-to-ship transfers outside Hormuz to keep cargoes moving, with Kuwaiti naphtha exports running near half pre-war volumes. The redirection of trade is visible further down the value chain: Singapore refiner Aster Chemicals and Energy, which once sourced around 70% of its crude from the Middle East, said it is leaning more heavily on West Africa, Latin America, the US and Canada; Nigeria's Dangote refinery bought roughly 520,000 bpd of Nigerian crude for October delivery as buyers seek alternatives to disrupted Middle East cargoes.



NATURAL GAS

Qatar, a major LNG exporter, had largely halted shipments through Hormuz since a tanker attack in late July, though ship-tracking data cited by Bloomberg showed several empty Qatari LNG carriers heading back toward the Gulf mid-week, a tentative signal of possible resumption; a Qatari LNG carrier, the Al-Murunah, did successfully transit using the Iran-designated corridor on September 8, a day after two other Qatari carriers attempted the same route and turned back. Qatar's foreign ministry said reopening the strait "unconditionally" is a diplomatic priority. Jordan announced it will supply Lebanon with regasified LNG through its floating terminal at Aqaba, implementing a three-country arrangement with Syria reached in May. European gas prices were reported up more than 120% since the start of the Iran war, a move serious enough that European sovereign bond markets, particularly French, Italian and British long-dated debt, suffered some of the worst selling in the G7 on fears the European Central Bank will need to keep raising rates to contain the resulting inflation; the ECB delivered its second rate increase of the year during the week, with policymakers flagging a further move as early as October as possible.







CONFLICT- DATA- OVER- VIEW

OVERVIEW

SEC.6



The table below combines two sources: direct queries against the ACLED archive maintained for this project (which currently tracks a defined set of countries and does not include Yemen, Syria, Egypt, Israel/Palestine as a combined figure, or Turkey) for the trailing period since August 20, and the ACLED trailing-window figures already cited, with their own coding-lag caveats, inside this week's underlying source reporting for the countries the local archive does not cover. Per the brief for this bulletin, ACLED's inherent coding lag (typically one to two weeks) is not further flagged in the discussion above; it is noted here once, for the table as a whole.

COUNTRY	RECORDED EVENTS	FATALITIES	DOMINANT EVENT TYPE
Iran	314	39	Protests (273); explosions/remote violence
Iraq	193	15	Protests (91); strategic developments (72)
Lebanon	635	11	Explosions/remote violence (404)
Palestine	674	72	Riots (232); strategic developments (184)
Saudi Arabia	5	0	Strategic developments; explosions/remote violence
Bahrain	25	0	Protests (16); riots (5)
Kuwait / Oman / Jordan / UAE	3–4 each	0	Strategic developments

For comparison, and to size the region against the period's other major conflict theatres: ACLED's trailing two-week counts cited in this week's source reporting put Ukraine at roughly 1,600–2,700 events and Russia at 550–1,200 events, several multiples of any single Middle Eastern country; Nigeria (130–230), Somalia (130–190) and Sudan (90–100) were the leading African entries in the same trailing window.



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