WESTMINSTER SECURITY

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UAE SITREP DOCUMENT

DAY 217, THE 204TH EDITION. THE US BUILDS UP ITS FORCES WHILE THE CHANNEL STAYS OPEN. A THIRD CARRIER STRIKE GROUP (USS THEODORE ROOSEVELT) AND AN AMPHIBIOUS GROUP WITH MORE THAN 2,000 MARINES ARE HEADING FOR THE REGION, AND TRUMP CALLS RENEWED STRIKES "POSSIBLE" AND SAYS IRAN WILL BE "HIT VERY HARD" IF IT WAS BEHIND THE FLYDUBAI ATTACK (NO EVIDENCE OFFERED). A KUWAITI SUPERTANKER IS STRUCK IN THE STRAIT (AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY), AND AN IRANIAN AUTHORITY LISTS THREE UAE-LINKED TANKERS AS NON-COMPLIANT. THE SAUDI FRONT REACHES MEDINA AND YANBU. ARAGHCHI SAYS "THE CHOICE NOW IS WITH THE US". NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

2 October 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠️ **MAXIMUM ALERT:** THE US IS MOVING A THIRD CARRIER STRIKE GROUP AND MORE THAN 2,000 MARINES TOWARD THE REGION, TRUMP HAS TIED THE FLYDUBAI ATTACK TO IRAN WITHOUT EVIDENCE, AND THE STRAIT HAS PRODUCED ANOTHER TANKER STRIKE. THE ALERT REMAINS AT MAXIMUM. According to US officials, the USS Theodore Roosevelt carrier strike group and the USS Makin Island amphibious group, together carrying some 9,000 sailors and Marines, are deploying to the Middle East; reported arrival dates range from late October to the end of November. In a TIME interview published on Thursday, President Trump called renewed strikes on Iran "possible", and at the White House he said Iran would be "hit very hard" if it was involved in the flydubai attack, adding that "based on what I'm hearing" it was; he offered no evidence. UKMTO reported at 17:50 GMT on Thursday that a tanker transiting the Strait of Hormuz was struck by an unknown projectile and caught fire, crew safe; maritime security sources name it as the Kuwaiti supertanker Kazimah III. This was a vessel at sea, with the cause unconfirmed, and not a strike on UAE territory. Iran's Persian Gulf Strait Authority has listed three UAE-linked tankers struck on 29 September as non-compliant with its transit rules. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure. 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 Strait transits.

⚖️ **MIXED SIGNALS:** THE CHANNEL IS OPEN; THE FORCE POSTURE IS HARDENING AROUND IT. On the diplomatic side, Iran is studying the US counterproposal received through Qatar, President Pezeshkian says Iran has "never run away from dialogue", and Foreign Minister Araghchi says the Strait "could be reopened" if the necessary conditions are met, adding that "the choice now is with the US." Bloomberg reported that Araghchi floated restoring inspector access to bombed nuclear sites in return for sanctions relief; Iran's Fars agency called the report false, so we treat it as disputed. On the harder side: the US is adding a third carrier, Treasury has widened sanctions to Iran's auto, rail and metals sectors, President Trump says Iran "is ready to fold up" and that the war could be won "right

after the election", and the Saudi-Houthi front has widened to Medina and Yanbu. The talks continue under a visible military clock.

⚠️ **ASSESSMENT:** A MILITARY CLOCK ON THE TALKS. THE ESCALATION RISK HAS RISEN AGAIN. THE ALERT STAYS AT MAXIMUM. The deployment is the most concrete change in this period. Reported arrival dates put the full force in place from late October, which gives the sequencing talks a working deadline and gives Washington options it does not have today. President Trump's statements remain an unreliable guide to timing; the movement of ships is a firmer one. His link between Iran and the flydubai attack is new and unevidenced, but it attaches a possible trigger to an incident aboard a UAE carrier, which brings the UAE closer to the centre of any escalation narrative. At sea, the Strait remains hostile: the Joint Maritime Information Center rates the threat there as SEVERE, with deliberate hostile action "highly likely", and Iran's listing of three UAE-linked tankers as non-compliant suggests UAE-linked shipping is now treated by Tehran as a category of its own. There is NO CONFIRMED STRIKE on UAE territory. The posture remains MAXIMUM with high readiness.

1. SITUATION SUMMARY: DAY 217, A FORCE BUILD-UP, A NEW TANKER STRIKE, AND THE UAE NAMED AT SEA

The US is building up its forces while the diplomatic channel stays open. US officials say the USS Theodore Roosevelt carrier strike group, with the cruiser USS Chosin, and the USS Makin Island amphibious ready group, with more than 2,000 Marines, are deploying to the Middle East, joining the USS George H.W. Bush and USS George Washington; AP reports some 9,000 personnel in total, and arrival dates are reported between late October and the end of November. President Trump said in a TIME interview that renewed strikes after the midterm elections are "possible", and told a Texas audience on Thursday evening that Iran "is ready to fold up." He also said Iran would be "hit very hard" if it was involved in the attack aboard a flydubai flight on 30 September, without offering evidence. On the diplomacy, Iran is weighing the US counterproposal received through Qatari mediators; Araghchi says "the choice now is with the US", and the dispute over whether Iran's UN delegation was expelled remains unresolved. At sea, UKMTO reported a tanker struck by an unknown projectile in the Strait at 17:50 GMT on Thursday, with a fire on board and the crew safe; maritime security sources identify the Kuwaiti VLCC Kazimah III. The cause is unconfirmed and this was not a strike on UAE territory. Iran's Persian Gulf Strait Authority has named three tankers struck on 29 September, two of them managed by ADNOC Logistics and Services, as non-compliant with its rules. In Saudi Arabia, the coalition says a Houthi drone damaged a power station in Medina on 29 September (the Houthis deny it), and maritime security firms report a projectile and fire inside Yanbu port on Thursday (unconfirmed by Saudi Arabia). There is no confirmed strike on UAE territory, ports or infrastructure. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Friday 2 October)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. A force build-up around open but unresolved talks. Complete departures; high readiness; suspend all Strait transits.
US force posture	**THIRD CARRIER GROUP DEPLOYING.** USS Theodore Roosevelt strike group and USS Makin Island amphibious group (2,000+ Marines), about 9,000 personnel (AP). Arrival reported late October to end November. CENTCOM: 125 vessels redirected under the blockade as of 30 September.
Diplomacy	**COUNTERPROPOSAL UNDER STUDY.** Iran weighing the US document received via Qatar. Araghchi: "The choice now is with the US." Bloomberg report of an inspector-access offer denied by Fars (disputed). UN delegation expulsion still disputed.
Trump and flydubai	**UNEVIDENCED LINK TO IRAN.** Trump: Iran involvement "based on

	what I'm hearing, is yes"; Iran would be "hit very hard." No evidence offered. Co-pilot now in UAE custody; UAE prosecutor examining "terrorist activity or intent."
Strait incidents	**KUWAITI VLCC STRUCK (1 OCT).** UKMTO 17:50 GMT: tanker hit by unknown projectile, fire, crew safe; named as Kazimah III. JMIC: threat SEVERE. At sea, cause unconfirmed, not a strike on UAE territory.
UAE-linked shipping	**NAMED BY IRAN.** Iran's Persian Gulf Strait Authority lists Al Ruwais, Mersin Prosperity and Sinbad (struck 29 September) as non-compliant. ADNOC L&S manages two of them. Ships at sea, cause unconfirmed.
Saudi and Yemen front	**MEDINA AND YANBU.** Coalition blames the Houthis for a drone strike on a Medina power station (29 September); the Houthis deny it. Unconfirmed projectile and fire at Yanbu port (1 October). Drones and missiles intercepted over Khamis Mushait and Jazan. Truce not agreed.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure. DXB, DWC and AUH operating with regional delays; Iranian airlines still suspended; flydubai Israel flights suspended.

WS Assessment: The US has moved from statements to ships. The deployment does not change the situation in the Emirates today, but it sets a working timetable for the talks and widens the options for a strike that Iran says it would answer at Gulf airports and against US ships. Iran's naming of UAE-linked tankers is the sharpest UAE-specific signal at sea this week. The alert stays at MAXIMUM with high readiness.

2. THE DIPLOMACY: A COUNTERPROPOSAL UNDER STUDY, A DISPUTED OFFER, AND NO AGREED ORDER

- **Iran studies the US document:** AP reports that Iran has confirmed receipt of the official US response to its plan, which Araghchi presented to the cabinet; the content has not been published. President Pezeshkian said Iran will "make every effort to bring the agreement to fruition", and later that Iran has "never run away from dialogue", while warning that the US should abandon "the idea of bringing us to our knees."
- **Araghchi puts the onus on Washington:** Araghchi said: "If the necessary conditions are met, the strait could be reopened. The choice now is with the US." The statement restates Iran's sequencing position: US steps first, the Strait afterwards. It does not indicate movement on the order of steps.
- **A reported inspector-access offer, disputed:** Bloomberg reported that Araghchi floated restoring international inspectors' access to bombed nuclear sites in exchange for sanctions relief. Iran's Fars news agency called the report false. If accurate, it would bear on the US demand for verifiable nuclear steps; until confirmed, we treat it as a disputed report.
- **The UN delegation dispute:** Axios reports, citing a US official, that Secretary of State Rubio ordered Iran's UN delegation to leave because "the UN General Assembly was over, so it was time for them to go"; a second US official said the delegation had "overstayed their welcome." Iran's UN mission says the delegation left on Monday evening on a schedule notified to the State Department on 17 September. The account remains disputed. Axios reports that Qatari mediators are still working on a compromise.
- **Sanctions widen:** Treasury announced measures on Thursday against Iran's automotive, rail, iron, steel, aluminium and copper sectors and their foreign suppliers, and designated the Russia-linked A7 shadow banking network. Three UAE-based entities were among those designated: Integrated Auto Parts LLC, Silver Line Metal Trading LLC and Traco International FZE. Treasury Secretary Bessent said that Iran "loaded ZERO crude oil onto tankers in September"; that is a US claim and is to be verified against independent tracking data.

WS Assessment: The process is alive, and Iran's public line is that the decision now sits in Washington. Nothing in this period narrows the gap on sequencing, and the one report that might have done so is denied by Iranian state media. The new designations of UAE-based entities are a direct compliance matter for clients. Hold posture until an order of steps is agreed and implemented.

3. THE US BUILD-UP, TRUMP'S FLYDUBAI CLAIM, AND A NEW TANKER STRIKE

- **A third carrier strike group:** US officials say the USS Theodore Roosevelt carrier strike group, which sailed from San Diego, and the USS Makin Island amphibious ready group, with USS John P. Murtha and USS Anchorage and more than 2,000 Marines, are deploying to the Middle East. AP puts the total at about 9,000 personnel; other outlets report figures up to 10,000, and arrival estimates range from late October to the end of November. A US official told Al Jazeera that leaders "will have many options for dealing with Iran." Troop figures and timings differ between sources and are to be verified.
- **Trump on renewed strikes:** In his TIME interview, President Trump said renewed strikes after the midterms are "possible" and that "with Iran, I don't think you could ever have peace." On Thursday evening he said Iran "is ready to fold up" and that the US would win "right after the election, maybe before the election." His statements continue to swing between deal talk and threats; the deployment is the firmer indicator.
- **The flydubai link, unevidenced:** Asked whether Iran was behind the attack on flydubai flight FZ1073 on 30 September, President Trump said: "I would say the answer, based on what I'm hearing, is yes, but we're working on it right now," and that Iran would be "hit very hard." He gave no evidence. Investigators are examining "all possible scenarios, from terrorism to mental disorders", according to AP. No Iranian link has been officially established.
- **A Kuwaiti supertanker struck:** UKMTO reported at 17:50 GMT on Thursday that a tanker transiting the Strait of Hormuz was struck by an unknown projectile, causing a fire; the crew is safe and the damage and environmental impact are unknown. Maritime security firm Vanguard Tech and trade press identify the vessel as Kazimah III, a Kuwait-flagged VLCC owned by Kuwait Oil Tanker Company; it is the second KOTC supertanker struck in four days. Fars reported a supertanker burning about 8 km off the coast of Oman, which may be the same vessel; that is not confirmed. No position relative to the UAE coast has been reported, the cause is unconfirmed, and this is not a strike on UAE territory.
- **The maritime threat rated SEVERE:** The Joint Maritime Information Center's update of 1 October keeps the Strait of Hormuz at SEVERE, assessing deliberate hostile action as "highly likely", and records at least 16 vessels targeted in September. The Gulf of Oman and the Arabian Gulf are rated MODERATE, and the Bab el-Mandeb, southern Red Sea and Gulf of Aden SUBSTANTIAL. An Iranian military adviser claims Iran has hit moving targets with long-range ballistic missiles "in the past few days"; that is an unverified Iranian claim, but it bears directly on Iran's threat to US ships.

WS Assessment: The deployment, the President's unevidenced flydubai claim and a further tanker strike all point the same way: the risk of a US escalation has risen again, and the Strait remains hostile. Clients should treat the Strait as closed to their vessels and hold readiness.

4. THE UAE: SHIPPING NAMED, THE FLYDUBAI INVESTIGATION, AND IRAN'S WARNINGS

- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and none since the Barakah strike of 17 May 2026. We found no NCEMA alert in the period. The tanker incidents of 29 September and 1 October were at sea, with the cause unconfirmed.
- **UAE-linked tankers listed as non-compliant:** Iran's Persian Gulf Strait Authority has said that the tankers Al Ruwais, Sinbad and Mersin Prosperity, which it describes as UAE-owned or chartered, were attacked, and has placed all three on its non-compliance list. ADNOC Logistics and Services manages two of the three and has declined to comment; the three were sailing with transponders off. UKMTO's record for 28 to 29 September also includes an outbound tanker struck on its port side near Khor Fakkan; no distance from the coast was given. These were ships at sea, beyond any confirmed territorial incident, with the cause unconfirmed, and not a strike on UAE territory. The Iranian listing is nonetheless the clearest indication to date that UAE-linked shipping is being singled out under Iran's transit rules.
- **The flydubai investigation moves to the UAE:** The Omani co-pilot accused of stabbing the captain of flydubai flight FZ1073 has been transferred from Saudi Arabia to UAE custody, and the UAE's chief prosecutor is examining "terrorist activity or intent." According to reporting, President Sheikh Mohamed bin Zayed told Prime Minister Netanyahu he expected the transfer. flydubai's Tel Aviv flights remain suspended, Emirates has suspended its codeshare, and El Al has reportedly cancelled repatriation flights from Dubai. President Trump's claim of Iranian involvement is unevidenced; the motive has not been officially established.
- **Iran's warnings stand:** Iran's warnings to the UAE over Netanyahu's 27 September visit remain in place; Iran International reports a hardening of the rhetoric, and recirculated remarks by parliament speaker Ghalibaf that "no infrastructure will be safe" date from 29 September and are not new. We found no new Iranian statement on the UAE dated inside this period. The UAE's suspension of Iranian airlines continues, and Iran has asked Iraq to lift its own sanctions-related flight restrictions.
- **UAE diplomacy:** The UAE Foreign Ministry has "strongly condemned" the attack on the Taiba power station in Medina as "a flagrant violation of the sovereignty of Saudi Arabia", aligning with Riyadh as the Saudi front widens.

WS Assessment: The UAE has not been struck, but it now features in three threads at once: Iranian enforcement against UAE-linked tankers, a US claim tying an incident aboard a UAE carrier to Iran, and Iran's standing warnings over the Netanyahu visit. Each raises exposure without crossing the territorial threshold. Clients should hold high readiness and keep UAE-linked vessels clear of the Strait.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait contested, the blockade enforced:** CENTCOM says the USS George H.W. Bush is operating in the Arabian Sea in support of the blockade and that, as of 30 September, its forces have redirected 125 commercial vessels. Gulf flows remain well above their wartime low (Gulf News cites about 80 per cent of pre-war levels, unsourced; to be verified), but there is no verified safe passage, and VLCC rates for Hormuz voyages are reported above $1 million a day. The Strait does not meet the reopening test in our de-escalation gate.
- **Oil:** Brent December futures settled at $102.31 on Thursday, up 4.4 per cent, with WTI at $92.87, as the deployment reports and tighter fuel supplies lifted prices. Early on Friday, reports of an EU plan to release diesel and IEA crude stocks pushed prices lower, toward $99; the time of that figure relative to our cutoff is to be verified.
- **The Saudi front widens:** The Saudi-led coalition says a Houthi drone struck the Taiba power distribution station in Medina, which serves the Prophet's Mosque, on 29 September, disabling one transformer; Houthi spokesman Yahya Saree called the accusation "fabrications and lies". Turkey, Qatar, Egypt, the Arab League and Pakistan, which called it a "grave provocation", have condemned the attack. Maritime security firms report that a projectile landed inside Aramco's Yanbu port on Thursday, causing a fire near a tank farm and a brief suspension of loading; there is no Saudi or Aramco confirmation and no claim, and we treat it as unverified. Yanbu handles about 2 million barrels a day since the East-West pipeline restarted on 22 September.
- **The Yemen front:** The coalition says it destroyed four drones over Khamis Mushait and two ballistic missiles over Khamis Mushait and Jazan on Thursday, with debris causing limited damage. Yemen's government-aligned army reports strikes on "high-value targets" in Sanaa and Saada and 20 air strikes in Taiz on Friday morning, and the government has approved general mobilisation, with Saudi funding of $59 million reported. The UN envoy reports "deeply troubling reports of casualties" in Taiz. The Houthis hold the Red Sea coast and maintain their blockade of Saudi shipping. The proposed Saudi-Houthi truce has not been agreed.
- **Iraq, Lebanon and the UK:** Quds Force commander Qaani says the US has been "expelled from Iraq" after the completed withdrawal; Iraq has confirmed 30 June 2027 as its militia disarmament deadline. Israeli artillery fire continued in south Lebanon on Friday morning. In the UK, counter-terrorism police have arrested a British-Iranian dual national in connection with the RAF Fairford case, and Iran has summoned the British ambassador; the Iranian role remains alleged and disputed.

WS Assessment: The Saudi front is now the most active outside the Strait, with an attack reported near the holiest sites and an unconfirmed incident at the export port that carries Saudi crude around Hormuz. The Fujairah route continues to insulate UAE exports, but Yanbu shows that bypass routes are themselves exposed. UAE-linked operators should continue to suspend all Strait transits pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **A build-up, and no confirmed strike on UAE territory.** The US is adding a third carrier group, President Trump has linked the flydubai attack to Iran without evidence, a further tanker has been struck in the Strait, and Iran has listed UAE-linked tankers as non-compliant. There is no confirmed damaging strike on UAE territory, ports or infrastructure. The Iran-UAE thaw remains under strain, and the airports threat and the risk of a US escalation keep the danger elevated.
- **COMPLETE DEPARTURES NOW: THE BUILD-UP SETS A TIMETABLE.** DXB, DWC and AUH are operating, with delays and cancellations on regional routes. Several foreign carriers have extended Dubai suspensions (reported dates for Air France vary between 13 and 24 October; Cathay Pacific has cancelled Dubai flights to 31 January 2027), and flydubai's Israel flights are suspended. Reported arrival dates for US reinforcements begin in late October. Complete any deferred non-essential departure on scheduled commercial flights without delay, and confirm bookings directly with the carrier.
- **HOLD READINESS AT A HIGH LEVEL: THE AIRPORTS THREAT AND A NEW POSSIBLE TRIGGER.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level. Iran has said it would answer a US strike at Gulf airports and against US ships, and President Trump has now tied a possible strike to an incident aboard a UAE carrier. Review shelter locations and NCEMA guidance, keep go-bags current, plan for disruption at UAE airports, and be prepared to shelter promptly on any alert. The UAE hosts US forces at Al Dhafra.
- **PROTECT ENERGY AND WATER RESILIENCE.** Prices rose sharply on Thursday and UAE fuel prices are higher for October. Keep water, fuel and generator contingencies ready and budget for higher fuel costs; the Fujairah route continues to provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS. UAE-LINKED VESSELS ARE NAMED.** A Kuwaiti supertanker was struck on Thursday, JMIC rates the Strait SEVERE, and Iran has listed three UAE-linked tankers as non-compliant. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat UAE-linked tonnage as at elevated risk until a confirmed reopening with verified safe passage is in place.
- **Compliance and aviation security.** Review counterparties against Thursday's Treasury designations, which include three UAE-based entities, and consult qualified counsel; this is not legal advice. Note the flydubai investigation and the suspension of Israel routes, and review travel arrangements for staff on affected routes.

Return Guidance: MAXIMUM Held, High Readiness, a Build-Up Around Unresolved Talks

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The US is deploying a third carrier strike group, the counterproposal has not closed the sequencing gap, a further tanker has been struck in the Strait, and Iran has named UAE-linked tankers as non-compliant. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, note the airports threat, and plan for protracted disruption.

- **All returns, SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a counterproposal under study during a force build-up is not a settlement.
- **Non-essential personnel, COMPLETE DEPARTURES NOW:** Use the open airports to finish any deferred departures without delay, on scheduled commercial flights, allowing for carrier suspensions; do not defer in expectation of an imminent resolution.
- **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 sequencing talks, the arrival of US reinforcements, any US strike on Iran and Iran's

warned widening of the war, Iranian action against UAE-linked shipping, the Saudi-Houthi front, and any strike toward UAE territory or airports.

- **Business and compliance clients:** Review exposure given the widened US sanctions, including the three UAE-based designations, and the US restrictions on Iranian airlines, and consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM to HIGH):** An agreed sequence, the lifting of the US blockade, the Strait reopened with verified safe passage, a confirmed ceasefire, and a durable de-escalation across all fronts would allow the alert to come down. None of these is in place; Westminster Security is ready to lower the alert to HIGH promptly once they are.
- **Further escalation, the central risk:** A US strike on Iran, including one framed as a response to the flydubai attack, Iran's warned retaliation against US ships and Gulf airports, Iranian action against UAE-linked vessels, a collapse of the mediation, or a strike on UAE territory or airports would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness. A counterproposal under study, a US build-up, a further tanker struck, UAE-linked tankers named, and the Iran-UAE thaw under strain. Protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and note the airports threat.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS. A build-up around open talks.** A third US carrier strike group and an amphibious group with more than 2,000 Marines are deploying. President Trump calls renewed strikes "possible" and says Iran will be "hit very hard" if it was behind the flydubai attack, without evidence. A Kuwaiti supertanker was struck in the Strait on 1 October (at sea, cause unconfirmed). Iran has listed three UAE-linked tankers as non-compliant. There is no confirmed strike on UAE territory.
- **WATCH THE SHIPS AND THE SEQUENCE, NOT THE STATEMENTS.** The arrival of US reinforcements and any agreed order of steps are the two indicators that matter. Statements from either capital are signals; hold posture until a sequence is agreed and implemented.
- **TREAT UAE-LINKED SHIPPING AS A DISTINCT RISK.** Iran's listing of UAE-linked tankers, two of them ADNOC-managed, places UAE tonnage in a category of its own under Iran's transit rules. Keep UAE-linked vessels out of the Strait and review routing through the Gulf of Oman.
- **NOTE THE FLYDUBAI TRIGGER.** The President's unevidenced claim of Iranian involvement attaches a possible strike rationale to an incident aboard a UAE carrier. Monitor the UAE prosecutor's findings and US statements closely, and hold high readiness for the airports threat.
- **CHECK COUNTERPARTIES AGAINST THE NEW DESIGNATIONS.** Treasury's 1 October action names three UAE-based entities. Screen counterparties and consult qualified counsel; this is not legal advice. Continue to use the Fujairah route.
- **Monitor for:** (1) whether the sides agree a sequence or the talks break; (2) the arrival of US reinforcements and any US strike on Iran; (3) Iran's warned widening of the war, to US ships and Gulf airports; (4) Iranian action against UAE-linked shipping; (5) findings in the flydubai investigation; (6) the Saudi-Houthi front, including Yanbu and Medina; (7) any strike on UAE territory.
- **A build-up under way. Emergency updates to follow.** Westminster Security will issue immediate updates on any agreement or collapse of the talks, any reopening of the Strait, any US strike on Iran, any threat to or strike on UAE territory, airports or UAE-linked shipping, or any major development, and will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.
- **This is the two hundred and fourth edition.** Day 217 of the war.

8. KEY POINTS

- **A US FORCE BUILD-UP.** The USS Theodore Roosevelt carrier strike group and the USS Makin Island amphibious group, with more than 2,000 Marines, are deploying to the Middle East, about 9,000 personnel in all according to AP. Arrival is reported between late October and the end of November. Figures differ between sources.
- **TRUMP RAISES THE STAKES, WITHOUT EVIDENCE ON FLYDUBAI.** President Trump calls renewed strikes “possible”, says Iran “is ready to fold up”, and says Iran will be “hit very hard” if it was behind the flydubai attack. No Iranian link has been established; the UAE prosecutor is investigating.
- **THE CHANNEL STAYS OPEN.** Iran is studying the US counterproposal received via Qatar. Araghchi says “the choice now is with the US.” A Bloomberg report of an inspector-access offer is denied by Fars. The order of steps remains unagreed.
- **A KUWAITI SUPERTANKER STRUCK; UAE-LINKED TANKERS NAMED.** UKMTO reports a tanker struck by an unknown projectile in the Strait on 1 October, named as Kazimah III; at sea, cause unconfirmed, not a strike on UAE territory. Iran’s Persian Gulf Strait Authority lists three UAE-linked tankers struck on 29 September as non-compliant. JMIC rates the Strait SEVERE.
- **THE SAUDI FRONT WIDENS.** The coalition blames the Houthis for a drone strike on a Medina power station, which the Houthis deny; an unconfirmed projectile caused a fire at Yanbu port. The UAE has condemned the Medina attack. The Saudi-Houthi truce has not been agreed. Brent settled at $102.31 on Thursday.
- **MAXIMUM HELD, HIGH READINESS. NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDRED AND FOURTH EDITION. DAY 217.** A build-up around open but unresolved talks, a further tanker struck, UAE-linked shipping named, and the Iran-UAE thaw under strain; no UAE territory has been struck. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, note the airports threat, and plan for protracted disruption. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 2nd October 2026. Information current as of 09:00 GMT.

THE US IS BUILDING UP ITS FORCES WHILE THE CHANNEL STAYS OPEN. A THIRD CARRIER STRIKE GROUP AND AN AMPHIBIOUS GROUP WITH MORE THAN 2,000 MARINES ARE DEPLOYING, PRESIDENT TRUMP CALLS RENEWED STRIKES “POSSIBLE”, AND HE SAYS IRAN WILL BE “HIT VERY HARD” IF IT WAS BEHIND THE FLYDUBAI ATTACK, WITHOUT OFFERING EVIDENCE. IRAN IS STUDYING THE US COUNTERPROPOSAL AND SAYS THE CHOICE NOW LIES WITH WASHINGTON.

A KUWAITI SUPERTANKER WAS STRUCK BY AN UNKNOWN PROJECTILE IN THE STRAIT ON 1 OCTOBER: A VESSEL AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY. IRAN HAS LISTED THREE UAE-LINKED TANKERS AS NON-COMPLIANT, AND THE SAUDI FRONT HAS REACHED MEDINA AND YANBU. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM ALERT HELD, HIGH READINESS. COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH THE SHIPS AND THE SEQUENCE, NOT THE STATEMENTS; TREAT UAE-LINKED SHIPPING AS A DISTINCT RISK; NOTE THE FLYDUBAI TRIGGER AND THE AIRPORTS THREAT; AND CHECK COUNTERPARTIES AGAINST THE NEW DESIGNATIONS. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND FOURTH EDITION. DAY 217.