WESTMINSTER SECURITY

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DAY 218, THE 205TH EDITION. TRUMP'S TOP NATIONAL SECURITY AIDES MEET UNANNOUNCED AT CAMP DAVID ON IRAN AND YEMEN, AND AXIOS REPORTS THAT "THINGS WERE DECIDED OR AT LEAST DEEPLY DISCUSSED". THE IRGC WARNS OF A RESPONSE "MORE DEADLY" THAN TRUE PROMISE 2, AND A TEHRAN SOURCE SAYS IRAN ASSESSES THAT "THE WAR IS RESUMING". TWO MORE TANKERS ARE STRUCK OFF OMAN (AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY). AN IRANIAN MP CALLS FOR THE UAE TO BE OCCUPIED. SAUDI ARABIA PREPARES AN OFFENSIVE FOR BAB EL-MANDEB. NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

3 October 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠️ **MAXIMUM ALERT:** WASHINGTON IS WEIGHING ITS NEXT STEP BEHIND CLOSED DOORS, TEHRAN SAYS IT IS PREPARING FOR WAR, AND THE STRAIT HAS PRODUCED TWO MORE TANKER STRIKES. THE ALERT REMAINS AT MAXIMUM. Axios reports that Vice President Vance chaired an unannounced meeting of President Trump's top national security officials at Camp David on Friday, covering the Iran war and the Saudi-Houthi conflict, including whether to resume major combat operations against Iran and a Saudi request for US strikes on the Houthis; one official said "things were decided or at least deeply discussed." The IRGC says the "era of cost-free threats has come to an end" and that any aggression will meet a response "more deadly than Operation True Promise 2", and a Tehran source told The National that "assessments in Iran are that the war is resuming." UKMTO reported two tankers struck by unidentified projectiles on Friday, one leaving the Strait (a small fire and blackout, since extinguished) and one about four nautical miles east of Oman; crews safe. These were vessels at sea off Oman, with the cause unconfirmed, and not strikes on UAE territory. 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 DOOR IS DESCRIBED AS OPEN; THE PREPARATIONS POINT THE OTHER WAY. On the easing side, the Tehran source says "the door to diplomacy remains open and has not been closed", The National reports an Iranian offer to transfer its 60 per cent enriched uranium stockpile to a third party within a phased road map (to be verified), the Qatari channel remains in place, and the G7's agreed release of 100 million barrels of diesel and crude pulled Brent below $100 on Friday. On the harder side: the Camp David meeting, an IRGC warning, President Trump's statement at a rally that the war will end "very soon and probably right after the midterms", two more tankers struck, a Saudi offensive in preparation on the Red Sea coast, and an Iranian lawmaker's call for the UAE to be occupied. The signals of preparation outweigh the signals of settlement.

⚠️ **ASSESSMENT:** DECISION TIME MAY BE APPROACHING. THE ESCALATION RISK HAS RISEN FOR A SECOND DAY. THE ALERT STAYS AT MAXIMUM. The Camp David meeting is the most significant development in this period. Its agenda (resuming combat against Iran and a Saudi request for US strikes in Yemen) and the reported comment that matters were "decided or at least deeply discussed" suggest that Washington is moving from posture to options; Axios notes that a comparable Camp David meeting in June 2025 came days before Israel's war with Iran. We do not know what was decided, and President Trump's public remarks remain an unreliable guide to timing. Tehran's messaging has hardened in step. At sea, the southern Strait off Oman remains the active strike zone, with six ships reported struck in a week. For the UAE, the risk picture is unchanged in kind but higher in degree: a US decision to resume strikes would test Iran's threats against Gulf airports and US ships, and the call by an Iranian MP to occupy the UAE, while not government policy, shows the tone in parts of Tehran. There is NO CONFIRMED STRIKE on UAE territory. The posture remains MAXIMUM with high readiness.

1. SITUATION SUMMARY: DAY 218, A CAMP DAVID MEETING, IRANIAN WAR PREPARATIONS, AND TWO MORE TANKERS STRUCK

Washington appears to be weighing its next step while Tehran prepares for renewed fighting. Axios reports that Vice President Vance chaired an unannounced meeting at Camp David on Friday attended by Secretary of State Rubio, Secretary of Defense Hegseth, envoy Steve Witkoff, CIA Director Ratcliffe and the Chairman of the Joint Chiefs, General Caine. The agenda covered the Iran war and the Saudi-Houthi conflict, including whether to resume major combat operations against Iran and a Saudi request for US air strikes on the Houthis. One official told Axios that "things were decided or at least deeply discussed"; no decision has been announced. At a rally in Mobile, Alabama, on Friday evening, President Trump said the war would "end very soon and probably right after the midterms" and that "we could leave tomorrow, and it would take them years to rebuild." In Tehran, the IRGC marked the anniversary of Operation True Promise 2 with a warning that "the era of cost-free threats has come to an end", and a Tehran source told The National that Iran is preparing for a "major round of fighting." At sea, UKMTO reported two tankers struck by unidentified projectiles on Friday, both off Oman; crews are safe. These were vessels at sea, cause unconfirmed, and not strikes on UAE territory. In Saudi Arabia, debris from an intercepted Houthi missile injured a resident in Asir late on Friday, and Reuters reports that Riyadh is preparing an offensive to retake Bab el-Mandeb. An Iranian lawmaker has called for the UAE to be occupied. 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 Saturday 3 October)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. US options under review; Iran preparing for renewed fighting. Complete departures; high readiness; suspend all Strait transits.
US decision-making	**CAMP DAVID MEETING (2 OCT).** Vance chaired; Rubio, Hegseth, Witkoff, Ratcliffe and Caine attended (Axios). Agenda: resuming combat against Iran; Saudi request for US strikes on the Houthis. "Things were decided or at least deeply discussed." No announcement.
US force posture	**BUILD-UP CONTINUING.** USS Theodore Roosevelt strike group and USS Makin Island amphibious group (2,000+ Marines) en route; arrival reported late October to end November. Patriot batteries reported delivered to Saudi Arabia and Qatar to protect energy sites.
Diplomacy	**OPEN BUT STALLED.** No Iranian reply to the US counterproposal reported. Tehran source: "The door to diplomacy remains open" but "the war is resuming." Reported Iranian offer to transfer its 60 per cent stockpile to a third party (to be verified). Sequencing unresolved.

Iran's posture	**HARDENING.** IRGC: "the era of cost-free threats has come to an end"; any aggression to meet a response "more deadly than Operation True Promise 2." Conditional threats against Gulf airports and US ships stand.
Strait incidents	**TWO TANKERS STRUCK (2 OCT).** UKMTO: outbound tanker struck, small fire and blackout, fire out, underway; a crude tanker struck on the port side about 4 nm east of Oman, crew safe. Off Oman, at sea, cause unconfirmed, not a strike on UAE territory.
UAE rhetoric and flydubai	**MP CALLS FOR OCCUPATION.** Iranian MP Haji-Deligani: "we should occupy the UAE" (Iran International; not government policy). UAE attorney general treats FZ1073 as an attempted terrorist act; Gargash warns on extremism. No Iranian link established.
Saudi and Yemen front	**OFFENSIVE IN PREPARATION.** Reuters: Saudi-backed offensive to retake Bab el-Mandeb within weeks. Three missiles and four drones intercepted over Khamis Mushait; debris injured a resident in Asir; a school in Najran hit. Heavy fighting in Taiz. Truce not agreed.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure. DXB, DWC and AUH operating with regional disruption; UAE-Israel flights suspended; Iranian airlines suspended.

WS Assessment: The centre of gravity has shifted from the deployment to the decision. The Camp David meeting does not tell us what Washington will do, but it tells us that the options are being worked through at the top, and Tehran is signalling that it expects a fight. Nothing has yet touched UAE territory. The alert stays at MAXIMUM with high readiness.

2. THE DIPLOMACY: A DOOR DESCRIBED AS OPEN, AND A WAR DESCRIBED AS RESUMING

- **No reply to the counterproposal:** We found no report in this period of a formal Iranian response to the US counterproposal received through Qatari mediators on 1 October. Axios describes the underlying impasse as one of mistrust and timing: Iran accuses the US of attacking during negotiations twice, and the US says Iran breached the June memorandum by attacking ships in the Strait soon after signing it.
- **A Tehran source on the state of play:** A source in Tehran told The National that recent talks in New York produced no breakthrough and that “the door to diplomacy remains open and has not been closed. But assessments in Iran are that the war is resuming.” The sides remain deadlocked on sequencing: Iran wants concrete US steps before reopening the Strait, and Washington wants the Strait reopened first.
- **A reported stockpile offer:** The National reports that Iran has proposed transferring its 60 per cent enriched uranium stockpile to a third party as part of a phased road map, extending ideas previously discussed with Oman. We have not seen this confirmed by Iranian or US officials and treat it as a report to be verified; it would bear on the US demand for verifiable nuclear steps.
- **The President’s line:** At a rally in Mobile, Alabama, on Friday evening, President Trump said: “That war is going to be over soon. It’s going to end very soon and probably right after the midterms,” and “We could leave tomorrow, and it would take them years to rebuild from what we did to them because they just wouldn’t negotiate.” Axios also quotes him as saying he must decide whether “Iran signs the deal, or it won’t exist any longer”; the occasion of that remark is to be verified.

WS Assessment: The channel has not closed, but both capitals are now speaking as if the next phase is military. No order of steps has been agreed. Hold posture until a sequence is agreed and implemented.

3. CAMP DAVID, THE IRGC WARNING, AND TWO MORE TANKERS STRUCK

- **An unannounced Camp David meeting:** Axios reports that President Trump's top national security officials met at Camp David on Friday, with Vice President Vance in the chair, to discuss the Iran war and the conflict in Yemen. The President is reported to be weighing whether to resume major combat operations against Iran, and a Saudi request for US air strikes on the Houthis. One official said "things were decided or at least deeply discussed." Separately, Defense News, citing Reuters, reports that the US provides intelligence and targeting support to Saudi Arabia but that the President had declined requests for direct military help; the two accounts are not yet reconciled.
- **The IRGC warning:** Marking the second anniversary of Operation True Promise 2 (Iran's missile attack on Israel of 1 October 2024), the IRGC said "the era of cost-free threats has come to an end and every aggression will be followed by a painful and regret-inducing response", and pledged a response "decisive, immediate, painful, regret-inducing and more deadly than Operation True Promise 2" to any aggression by the US or its regional allies (Tasnim, 2 October).
- **Two more tankers struck off Oman:** UKMTO reported on Friday afternoon that a tanker sailing out of the Strait of Hormuz was struck by an unidentified projectile, causing a small fire and blackout; the fire was extinguished, there were no injuries, and the vessel continued its voyage. On Friday evening UKMTO reported that the master of a crude oil tanker about four nautical miles east of Oman reported being struck on the port side by an unknown projectile; the crew is safe and no environmental damage was reported. Maritime Executive, citing Ambrey, describes a Panama-flagged crude tanker about 5.3 nautical miles off Oman's coast; vessel names and the match between reports are to be verified. Both incidents were at sea off Oman, with the cause unconfirmed, and were not strikes on UAE territory. No party has claimed either attack.
- **The tempo at sea:** Maritime Executive counts six ships struck in a week. The New York Times, as cited by JINSA, reports that Iran has averaged about 10 anti-ship missile and 30 drone attacks a week against commercial shipping in the Strait since August; that figure is attributed and is to be verified. Five Indian crew members from the Kazimah III, struck on 1 October, were brought ashore with Omani assistance.

WS Assessment: A decision meeting at the top in Washington, an explicit IRGC warning and a steady run of tanker strikes off Oman all point to a higher risk of renewed US-Iran hostilities. Clients should treat the Strait as closed to their vessels and hold readiness.

4. THE UAE: AN IRANIAN MP'S OCCUPATION CALL, THE FLYDUBAI INVESTIGATION, AND NO STRIKE

- **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. Friday's two tanker incidents were off Oman, at sea, with the cause unconfirmed.
- **An Iranian MP calls for the UAE to be occupied:** Iran International reports that Iranian lawmaker Hossein-Ali Haji-Deligani said: "Yes, we should occupy the UAE. This can be done easily," describing the UAE as "a branch of Israel" and saying Prime Minister Netanyahu should have been targeted during his 27 September visit to Abu Dhabi. These are the remarks of an individual hardline MP, not a statement of Iranian government policy, and we have not seen the original broadcast; they are reported here as rhetoric. They nonetheless sharpen the hostility toward the UAE already evident in Iran's warnings over the Netanyahu visit.
- **The flydubai case, treated as terrorism:** The UAE's attorney general has classified the attack on flydubai flight FZ1073 as an attempted terrorist act, according to The National. Dr Anwar Gargash, diplomatic adviser to the President, said on Saturday that "the region's struggle with extremism persists, and justifying terrorism through hate speech is part of the danger, not its margins." The wounded captain, Smit Machchhar, has described fighting for his life to save the passengers. Officials say there is no confirmed evidence of Iranian involvement; President Trump's claim of a link remains unevidenced.
- **Repatriation flights and aviation:** An Arkia flight carrying Israeli passengers stranded in the UAE left Dubai on Friday night and landed at Ben Gurion shortly after 01:00 local time on Saturday, with further flights by Israeli carriers arranged. Commercial UAE-Israel flights remain suspended, as does the UAE's suspension of Iranian airlines. Gulf News reports that Air France, KLM, Wizz Air, Singapore Airlines and others have suspended Dubai services to 24 October, with longer suspensions by Finnair, Virgin Atlantic and Cathay Pacific (dates to be confirmed with each carrier).

WS Assessment: The UAE has not been struck. The new element is rhetorical: an Iranian MP's call to occupy the country, on top of standing warnings over the Netanyahu visit and Iran's naming of UAE-linked tankers. It is not policy, but it is a marker of how the UAE is viewed by hardliners if fighting resumes. Hold high readiness.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait contested, the blockade enforced:** CENTCOM's most recent figure, as of 30 September, is 125 commercial vessels redirected under the blockade. UANI counts at least 52 tankers laden with Iranian oil clustered along the Iranian coast. There is still no verified safe passage, and the Strait does not meet the reopening test in our de-escalation gate.
- **Oil and the G7 release:** The G7 has agreed a coordinated release of 100 million barrels over four months, half diesel and half crude, beginning immediately; President Trump said European leaders had agreed to release a "massive amount" of diesel. Brent settled at $99.74 on Friday, down 2.5 per cent, with WTI at $89.34; Brent fell about 4 per cent over the week. Analysts note that the main strain is now in refined products rather than crude.
- **A Saudi offensive in preparation:** Reuters reports that Saudi Arabia is preparing to back an offensive by Yemeni government forces to retake Bab el-Mandeb, possibly within weeks, with more than 100,000 Yemeni troops potentially mobilised and Saudi air support; estimates of timing range from within a week to after the US midterms. Defense News reports that France plans to send air defences and troops to protect Yanbu. Pakistan's foreign minister says the Makkah defence pact committee (Pakistan, Saudi Arabia and Türkiye) will meet in Riyadh next week on the Houthi attacks: "If any one of us faces a challenge, we will help each other."
- **Strikes on Saudi Arabia:** Late on Friday, shrapnel from an intercepted Houthi ballistic missile injured a resident in Ahad Rafidah, Asir, and damaged a prayer room and vehicles. At about 03:00 local time on Saturday the coalition intercepted three ballistic missiles fired toward Khamis Mushait and four drones; a Houthi projectile struck a school in Najran, causing material damage and no casualties (Arab News).
- **The Yemen front:** Yemen's government-aligned army claims 474 operations in 24 hours across Taiz, Marib, Sanaa and Saada, with 1,540 Houthi fighters killed or wounded; that is a partisan claim and is not independently verified. Xinhua, citing both sides, reports more than 70 killed in 24 hours of fighting in Taiz. The Houthis report 94 Saudi air and missile strikes in 24 hours. The Houthis hold the Red Sea coast and maintain their blockade of Saudi shipping; the proposed Saudi-Houthi truce has not been agreed.
- **Iraq and Europe:** Iraq's ambassador says flights between Iran and Iraq will resume despite US sanctions. Italy's foreign minister has called for stronger EU maritime security operations in Hormuz and the Red Sea.

WS Assessment: The Saudi front is moving toward a major ground offensive, which could draw in US air power and widen the war on the Red Sea route that carries Saudi crude around Hormuz. The G7 release eases prices but not the physical risk. 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 decision point, and no confirmed strike on UAE territory.** Washington's top officials have met on the next steps against Iran and in Yemen, the IRGC has warned of a heavier response than in 2024, two more tankers were struck off Oman, and an Iranian MP has called for the UAE to be occupied. 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 WINDOW MAY BE NARROWING.** DXB, DWC and AUH are operating, with disruption on regional routes. Several foreign carriers have suspended Dubai services to late October or longer, and UAE-Israel flights are suspended. 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.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level. A US decision to resume strikes would test Iran's threats against Gulf airports and US ships. 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.** The G7 release lowered prices on Friday, but refined products remain tight and UAE fuel prices are higher for October. Keep water, fuel and generator contingencies ready; the Fujairah route continues to provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS.** Two more tankers were struck off Oman on Friday, six in a week by one count, and UAE-linked tankers remain on Iran's non-compliance list. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters off Oman and 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.** Continue to screen counterparties against the 1 October Treasury designations, which include three UAE-based entities, and consult qualified counsel; this is not legal advice. Note the UAE's treatment of the flydubai attack as attempted terrorism, and review travel arrangements for staff on affected routes.

Return Guidance: MAXIMUM Held, High Readiness, a Decision Point in Washington

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. US officials have met at Camp David on resuming combat against Iran, Iran says it is preparing for renewed fighting, two more tankers were struck off Oman, and an Iranian MP has called for the UAE to be occupied. 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; an open channel with no agreed sequence 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 wait for the outcome of US deliberations.
- **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 any US decision on renewed strikes, Iran's warned retaliation, Iranian action against UAE-linked shipping, the Saudi offensive in Yemen, 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 decision to resume strikes on Iran, Iran's warned retaliation against US ships and Gulf airports, Iranian action against UAE-linked vessels, US strikes in Yemen, 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 decision point in Washington, Iran preparing for renewed fighting, two more tankers struck off Oman, hostile rhetoric toward the UAE, 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 decision point in Washington.** Top US national security officials met unannounced at Camp David on Friday on resuming combat against Iran and on a Saudi request for US strikes on the Houthis. The IRGC warns of a response "more deadly" than in 2024. Two tankers were struck off Oman on 2 October (at sea, cause unconfirmed). There is no confirmed strike on UAE territory.
- **WATCH FOR THE DECISION, NOT THE RHETORIC.** The outcome of the Camp David deliberations and any agreed order of steps are the indicators that matter. Rally statements and anniversary warnings are signals; hold posture until a sequence is agreed and implemented.
- **NOTE THE HOSTILE RHETORIC TOWARD THE UAE.** An Iranian MP's call to occupy the UAE is not policy, but with Iran's warnings over the Netanyahu visit and its listing of UAE-linked tankers it marks the UAE as a likely focus of hardline anger if fighting resumes. Hold high readiness for the airports threat.
- **WATCH THE RED SEA AS A SECOND ESCALATION PATH.** A Saudi-backed offensive for Bab el-Mandeb, possibly with US air support, would widen the war along the route that carries Saudi crude around Hormuz. Continue to use the Fujairah route.
- **KEEP UAE-LINKED VESSELS OUT OF THE STRAIT.** The southern Strait off Oman remains the active strike zone. Keep UAE-linked vessels clear and review routing through the Gulf of Oman.
- **Monitor for:** (1) any announced US decision on renewed strikes on Iran; (2) whether the sides agree a sequence or the talks break; (3) Iran's warned retaliation against US ships and Gulf airports; (4) Iranian action against UAE-linked shipping; (5) the Saudi offensive in Yemen and any US strikes there; (6) further hostile statements toward the UAE; (7) any strike on UAE territory.
- **A decision point. Emergency updates to follow.** Westminster Security will issue immediate updates on any US decision to resume strikes, any agreement or collapse of the talks, any reopening of the Strait, 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 fifth edition.** Day 218 of the war.

8. KEY POINTS

- **A CAMP DAVID MEETING ON IRAN AND YEMEN.** Vice President Vance chaired an unannounced meeting of top national security officials on Friday on resuming combat against Iran and a Saudi request for US strikes on the Houthis. “Things were decided or at least deeply discussed” (Axios). No decision has been announced.
- **IRAN SAYS IT IS PREPARING FOR WAR.** The IRGC warns of a response “more deadly than Operation True Promise 2”, and a Tehran source says “the war is resuming” while the door to diplomacy stays open. No reply to the US counterproposal has been reported.
- **TWO MORE TANKERS STRUCK OFF OMAN.** UKMTO reports an outbound tanker hit (small fire and blackout) and a crude tanker hit about 4 nm east of Oman on 2 October; crews safe. At sea, cause unconfirmed, not a strike on UAE territory.
- **HOSTILE RHETORIC TOWARD THE UAE.** An Iranian MP says “we should occupy the UAE” (Iran International); not government policy. The UAE treats the flydubai attack as attempted terrorism; no Iranian link has been established.
- **THE SAUDI FRONT HEADS FOR AN OFFENSIVE.** Reuters reports a Saudi-backed offensive to retake Bab el-Mandeb within weeks; missiles and drones intercepted over Khamis Mushait, a resident injured in Asir. The G7 is releasing 100 million barrels; Brent settled at $99.74 on Friday.
- **MAXIMUM HELD, HIGH READINESS. NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDRED AND FIFTH EDITION. DAY 218.** A decision point in Washington, Iran preparing for renewed fighting, two more tankers struck, and hostile rhetoric toward the UAE; 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 3rd October 2026. Information current as of 09:00 GMT.

WASHINGTON IS WEIGHING ITS NEXT STEP. PRESIDENT TRUMP’S TOP NATIONAL SECURITY OFFICIALS MET UNANNOUNCED AT CAMP DAVID ON RESUMING COMBAT AGAINST IRAN AND ON A SAUDI REQUEST FOR US STRIKES IN YEMEN, AND TEHRAN SAYS IT IS PREPARING FOR A MAJOR ROUND OF FIGHTING WHILE KEEPING THE DOOR TO DIPLOMACY OPEN.

TWO MORE TANKERS WERE STRUCK OFF OMAN ON 2 OCTOBER: VESSELS AT SEA, CAUSE UNCONFIRMED, NOT STRIKES ON UAE TERRITORY. AN IRANIAN MP HAS CALLED FOR THE UAE TO BE OCCUPIED, AND SAUDI ARABIA IS PREPARING AN OFFENSIVE FOR BAB EL-MANDEB. 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 FOR THE DECISION, NOT THE RHETORIC; NOTE THE HOSTILE TONE TOWARD THE UAE AND THE AIRPORTS THREAT; WATCH THE RED SEA AS A SECOND ESCALATION PATH; AND KEEP UAE-LINKED VESSELS OUT OF THE STRAIT. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND FIFTH EDITION. DAY 218.