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DAY 188 – THE CYCLE POISED AT HIGH TENSION: NO CONFIRMED MAJOR NEW STRIKES OVERNIGHT (AN APPARENT PAUSE AFTER TUESDAY'S EXCHANGE), BUT TRUMP THREATENS TO STRIKE KHARG ISLAND (IRAN'S OIL TERMINAL) AND IRAN THREATENS TO BLOCK ALL GULF OIL EXPORTS – WHILE THE MEDIATORS (QATAR, PAKISTAN, OMAN) PUSH HARD FOR "AN IMMEDIATE AND COMPLETE CESSATION" AND A RETURN TO TALKS – NO NEW DAMAGING STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

3 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE STRIKE CYCLE PERSISTS AT HIGH TENSION, POISED BETWEEN ESCALATION AND MEDIATED DE-ESCALATION. There have been no confirmed major new strikes in the latest period – an apparent pause after Tuesday's exchange – but both sides are threatening major escalation. President Trump is threatening to strike Kharg Island, Iran's main oil export terminal, and Iran has threatened to block all oil exports from the Gulf, not just its own, in retaliation. Iranian officials say Kharg is calm and it has not been struck, and Iran has told the United Nations it will answer any new attack "decisively and proportionately." US Treasury Secretary Bessent has warned of new sanctions, and the US embassy in Qatar has issued a security alert for the region. There is NO CONFIRMED NEW DAMAGING STRIKE on UAE territory, ports or infrastructure, and no new attack on the UAE in the latest period – but Iran's threat to block Gulf oil exports directly affects the UAE, and the threat remains acute. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, holds readiness at a high level, and advises clients to complete departures and suspend all Strait transits.

⚠ **ASSESSMENT:** POISED ON A KNIFE-EDGE – THE MEDIATORS PUSH FOR A STOP. The situation is poised on a knife-edge between two paths. On the escalation side, the threats are grave: a US strike on Kharg Island would hit Iran's oil-export lifeline and could trigger a major Iranian retaliation across the Gulf, and Iran's threat to block all Gulf oil exports would, if acted upon, be a dramatic escalation directly affecting the UAE. On the de-escalation side, the region's mediators – Qatar, Pakistan and Oman – are pushing hard for a stop: Qatar has called for "an immediate and complete cessation of all military actions" and a return to the negotiating track, warning that "we are all affected by this escalation," and Iran's president maintains Iran would reciprocate if Washington honoured its June commitments. The apparent pause after Tuesday's exchange is fragile but real, and offers a window the mediators are working to widen. The next moves – whether the US strikes Kharg, whether Iran acts on its oil threat, or whether the mediators secure a cessation – will determine whether the cycle escalates or subsides. For UAE clients, the posture must remain at its most cautious: MAXIMUM, high readiness, complete departures, suspend all Strait transits, and vigilance. There is NO NEW DAMAGING STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 188 – POISED ON A KNIFE-EDGE

The strike cycle persists at high tension but is poised on a knife-edge between further escalation and mediated de-escalation, with no confirmed major new strikes in the latest period suggesting a fragile pause after Tuesday's exchange. Both sides, however, are threatening major escalation: President Trump is threatening to strike Kharg Island, Iran's principal oil export terminal, and Iran's parliament speaker has threatened that if Iran is prevented from exporting oil, no one will be able to export oil from the Persian Gulf – a threat directly affecting the UAE and the other Gulf producers. Iranian officials have dismissed the Kharg threat, saying the terminal is calm and continuing repairs from earlier damage, and Iran has told the United Nations it will answer any new attack decisively and proportionately. Against these threats, the region's mediators – Qatar, Pakistan and Oman – are pushing hard for de-escalation: Qatar has called for an immediate and complete cessation of all military actions and a return to the negotiating track, warning that all are affected by the escalation, and Iran's president has reiterated that Iran would reciprocate if Washington honoured its June commitments. US Treasury Secretary Bessent has warned of new sanctions, and the US embassy in Qatar has issued a security alert for the region. There is no confirmed new damaging strike on UAE territory, and no new attack on the UAE in the latest period, but the threat remains acute. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, hold high readiness, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Thursday 3 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The cycle is poised. Complete departures; high readiness; suspend all Strait transits.
Strike exchange	**APPARENT PAUSE.** No confirmed major new strikes in the latest period after Tuesday's exchange – a fragile pause, with major escalation threatened.
Kharg Island threat	**THREATENED, NOT STRUCK.** Trump threatens to strike Iran's main oil terminal; Iranian officials say Kharg is "calm" and not struck. A major potential escalation.
Iran oil threat	**BLOCK ALL GULF EXPORTS.** Iran threatens that "no one will be able to export oil" from the Gulf – a threat directly affecting the UAE.
Mediation	**PUSHING FOR CESSATION.** Qatar calls for "an immediate and complete cessation" and a return to talks; intensifying efforts with Pakistan and Oman.
Iran's offer	Pezeshkian: Iran would reciprocate immediately if Washington honoured its June commitments. The conditional off-ramp stands.
UAE	**NO NEW STRIKE; THREAT ACUTE.** No new damaging strike on UAE territory; no new attack in the latest period. Iran's oil threat affects the UAE. Airports open.

WS Assessment: The cycle is poised on a knife-edge: an apparent pause after Tuesday, but grave escalation threatened (a Kharg strike, Iran's all-Gulf oil threat) against a hard mediation push for cessation. The alert stays at MAXIMUM with high readiness, and the next moves will determine whether the cycle escalates or subsides; clients should remain at their most cautious and watch closely.

2. THE ESCALATION THREATS – KHARG ISLAND AND IRAN'S OIL-EXPORT THREAT

- **The Kharg Island threat:** President Trump is threatening to strike Kharg Island, Iran's principal oil export terminal in the Persian Gulf, through which the bulk of Iran's crude is shipped; a strike on the terminal's oil infrastructure would hit Iran's economic lifeline and mark a major escalation beyond the military and tanker targets struck so far.
- **Not struck – Iran dismisses it:** Iranian officials have dismissed the threat: the head of the state oil company said conditions at Kharg are calm and that workers are continuing to repair damage from earlier attacks, indicating the terminal has not been struck in the current escalation – the threat is, for now, rhetorical, but it is a serious escalation risk to watch.
- **Iran's all-Gulf oil threat:** Iran has escalated its own threats, with its parliament speaker warning that if Iran is prevented from exporting oil, then no one will be able to export oil from the Persian Gulf – a threat to disrupt not just Iranian but all Gulf oil exports, of direct and serious concern to the UAE and the other Gulf producers.
- **A dangerous linkage:** The two threats are linked and dangerous: a US strike on Kharg could prompt Iran to act on its threat to block all Gulf oil exports, and to retaliate across the Gulf, including potentially against the UAE; the oil-export dimension raises the stakes of the confrontation for the entire region.
- **Iran's stated posture:** Iran has told the United Nations it will answer any new attack decisively and proportionately, and has shown no public sign of yielding to the pressure; the risk is that a further US strike – on Kharg or elsewhere – triggers a major Iranian retaliation and a further escalation of the cycle.

WS Assessment: The Kharg Island threat and Iran's all-Gulf oil threat are the most serious escalation risks of the moment, and either's realisation would sharply escalate the confrontation with direct implications for the UAE. Clients should watch closely for any US strike on Kharg or Iranian move against Gulf oil exports, either of which would be a major escalation.

3. THE MEDIATORS PUSH FOR CESSATION – QATAR, PAKISTAN, OMAN

- **Qatar's call for cessation:** Qatar has called for an immediate and complete cessation of all military actions and attacks that threaten the security and stability of the region, warning that the continuation of the strikes represents a dangerous escalation that would undermine the diplomatic efforts seeking security and stability – a clear diplomatic push from a key mediator for an immediate stop.
- **"We are all affected":** Qatar's foreign ministry spokesman warned that leaving the issue of control over the Strait unresolved would end in escalation, as had now been seen, and that this escalation would benefit no one: all are affected by it, he said, urging the parties to exercise wisdom and return to the negotiating track.
- **Intensifying mediation:** Qatar said it was continuing and intensifying its efforts with its mediation partners – Pakistan and Oman – to ensure a return to the negotiating track, building on the Qatari foreign minister's visit to Tehran last week; the proven mediators are working actively to halt the escalation and revive the diplomacy.
- **Iran's conditional off-ramp:** Iran's president, at the SCO summit, reiterated that Iran would reciprocate immediately if Washington honoured its commitments under the June memorandum – the conditional off-ramp remains on the table, offering the mediators a basis on which to seek a de-escalation despite the strikes.
- **The window:** The apparent pause after Tuesday's exchange offers a window for the mediators to work; whether they can secure a cessation and a return to talks before either side escalates further – with a Kharg strike or an oil-export blockade – is the central question, and the mediators' efforts are the main hope for de-escalation.

WS Assessment: The hard push by Qatar, Pakistan and Oman for an immediate cessation and a return to talks, together with Iran's conditional off-ramp, is the main de-escalation hope, and the apparent pause gives them a window to work. But the escalation threats are grave, and the mediators' success is not assured; clients should watch whether the mediation gains traction or the cycle escalates.

4. AN APPARENT PAUSE; THE UAE; THE REGIONAL PICTURE

- **An apparent pause:** There have been no confirmed major new strikes in the latest period, following the exchanges of Sunday through Tuesday – an apparent, if fragile, pause; whether it holds or gives way to further escalation depends on the next moves by the US and Iran and the success of the mediation.
- **No new attack on the UAE:** There has been no new attack on the UAE in the latest period, beyond Sunday's intercepted drone; there is no new damaging strike on UAE territory, ports or infrastructure, and no casualties in the UAE – the UAE has not been struck again as the cycle has paused.
- **But the oil threat affects the UAE:** Iran's threat to block all Gulf oil exports directly affects the UAE, a major oil exporter, and a US strike on Kharg could prompt Iranian retaliation across the Gulf; the UAE remains exposed both to the economic threat and to potential further Iranian attacks as a host of US forces.
- **US security alert:** The US embassy in Qatar has issued a security alert warning of the potential for unforeseen escalation and urging heightened vigilance amid possible flight cancellations, airspace closures and travel disruptions – a reflection of the heightened threat environment across the Gulf, relevant to the UAE and its airports.
- **The regional fronts:** Israel is bracing for a possible Iranian attack during the Jewish holidays, the Houthi campaign against Saudi shipping continues, and the US blockade remains in force; the regional fronts remain active, and the arena could widen further if the cycle escalates.

WS Assessment: The apparent pause and the absence of a new attack on the UAE are modest reliefs, but the escalation threats – the Kharg strike, Iran's oil-export threat – and the heightened threat environment mean the UAE remains exposed and the situation dangerous. Clients should hold high readiness and watch closely for any escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait a strike zone:** The Strait remains a strike zone: tankers have been struck – the Bahri-operated Sidr and the South Korean-operated Senegal Prosperity among them – the US and Iran have exchanged strikes, and the waterway is mined and blockaded; transit is acutely dangerous, and Iran now threatens to block all Gulf oil exports.
- **The Kharg and oil-export threats:** The threats to Iran's Kharg oil terminal and to all Gulf oil exports have raised the risk premium; a strike on Kharg or an Iranian move to block exports would sharply disrupt global oil supply, on top of the existing disruption from the closed Strait.
- **Oil elevated:** Oil prices have risen with the escalation, with Brent around $91 a barrel; the risk premium has climbed as fears of a wider conflict and of strikes on oil infrastructure grow, reversing the easing of the previous week.
- **The blockade and regional fronts:** The US naval blockade remains in force, the Houthi campaign against Saudi shipping continues, and Israel is bracing for an Iranian attack; the regional fronts are active, with the direct US-Iran exchange the dominant dynamic and the oil-export dimension raising the stakes.
- **UAE approaches:** Beyond Sunday's intercepted drone, there is no damage to UAE territory or to shipping in UAE waters; vessels remain anchored off the UAE's east coast at Khor Fakkan. UAE-linked operators should treat the Strait as a strike zone and suspend all transits.

WS Assessment: The Strait remains a strike zone and the oil-export threats have raised the stakes for global supply and for the UAE; the danger to shipping is acute. For UAE-linked operators, all Strait transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **An apparent pause – but the threat acute, and no new damaging strike on UAE territory.** The strike cycle has apparently paused, and there has been no new attack on the UAE in the latest period. But both sides threaten major escalation – a US strike on Kharg, Iran's threat to block all Gulf oil exports – and the threat to the UAE remains acute. There is no new damaging strike on UAE territory, ports or infrastructure.
- **COMPLETE DEPARTURES NOW – USE THE PAUSE.** With airports operating and an apparent pause in the strikes, complete any deferred non-essential departure on scheduled commercial flights without delay. The pause is fragile and the threat acute; completing departures now is a priority, and the window should not be assumed to remain open.
- **HOLD READINESS AT A HIGH LEVEL – WATCH FOR ESCALATION.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the cycle could escalate rapidly if the US strikes Kharg or Iran acts on its oil threat. Review shelter locations and NCEMA guidance, keep go-bags current, and be prepared to shelter promptly on any alert. The UAE hosts US forces at Al Dhafra.
- **Review Iran-related sanctions exposure.** US Treasury Secretary Bessent has warned of new sanctions. Review exposure to Iran-related sanctions risk through exchange houses, trade finance, shipping and re-export, and watch for new designations; consult qualified counsel. This is not legal advice.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT IS A STRIKE ZONE.** Tankers have been struck, the US and Iran are exchanging strikes, the Strait is mined and blockaded, and Iran threatens to block all Gulf oil exports. Suspend all transits, hold vessels clear of the Strait and the Bab al-Mandeb, and treat the Strait as a strike zone until a durable de-escalation is confirmed.
- **Utility and shelter measures should remain in place, with attention to water and energy.** Keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption, and Iran's threats to Gulf energy make resilience a priority amid the escalation. Follow official UAE and NCEMA guidance.

Return Guidance: MAXIMUM Held, High Readiness – the Cycle Poised

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The cycle is poised between escalation and mediated de-escalation; both sides threaten major escalation, but there is an apparent pause and the mediators are pushing hard for a cessation. Clients should complete departures now, hold high readiness, suspend all Strait transits, and watch for escalation or a mediated stop.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE; the cycle is poised and major escalation is threatened – this is not a setting for returns.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the apparent pause and the open airports to finish any deferred departures without delay, on scheduled commercial flights; do not assume the window remains open.
- **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 for a US strike on Kharg, an Iranian move against Gulf oil exports, any attack on the UAE, and any further widening of the strikes.
- **Business/compliance clients:** Bessent has warned of new sanctions; review exposure given the direct sanctions, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A mediated cessation of the strikes, the lifting of the US blockade, a confirmed de-escalation or ceasefire, and a genuine reopening of the Strait with verified safe passage would allow the alert to come down. The mediators are

pushing for a cessation, and Iran's conditional offer stands; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.

- **Further escalation – the central risk:** A US strike on Kharg Island, an Iranian move to block Gulf oil exports, a damaging strike on UAE territory, an Iranian attack on Israel, or a collapse of the mediation would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the cycle poised, major escalation threatened, the mediators pushing for a stop; protect people first, complete departures now, hold high readiness, suspend all Strait transits, and protect energy and water resilience.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the cycle is poised.** There are no confirmed major new strikes in the latest period (an apparent pause), but Trump threatens to strike Kharg Island and Iran threatens to block all Gulf oil exports; the mediators (Qatar, Pakistan, Oman) push for "an immediate and complete cessation." There is no new damaging strike on UAE territory, but the threat is acute.
- **WATCH FOR A KHARG STRIKE OR AN IRANIAN OIL-EXPORT MOVE – EITHER WOULD BE A MAJOR ESCALATION.** A US strike on Iran's oil terminal, or an Iranian move to block Gulf oil exports, would sharply escalate the confrontation with direct implications for the UAE. Watch closely for either.
- **NOTE THE MEDIATION PUSH – THE MAIN DE-ESCALATION HOPE.** Qatar, Pakistan and Oman are pushing hard for a cessation and a return to talks, and Iran's conditional offer stands. The apparent pause gives them a window; watch whether the mediation gains traction.
- **COMPLETE DEPARTURES NOW; SUSPEND ALL STRAIT TRANSITS.** Use the apparent pause to complete deferred non-essential departures on scheduled flights without delay, and do not assume the window remains open. The Strait is a strike zone; suspend all transits until a durable de-escalation is confirmed.
- **HOLD HIGH READINESS; REVIEW SANCTIONS EXPOSURE.** The cycle could escalate rapidly. Hold shelter and evacuation readiness at a high level, review NCEMA guidance, and review Iran-related sanctions exposure given Bessent's warning of new sanctions. Consult qualified counsel; this is not legal advice.
- **Monitor for:** (1) a US strike on Kharg Island; (2) an Iranian move to block Gulf oil exports; (3) any attack on the UAE or damaging strike on UAE territory; (4) whether the mediators secure a cessation; (5) an Iranian attack on Israel during the Jewish holidays.
- **The cycle is poised – emergency updates to follow.** Westminster Security will issue immediate updates on any strike on Kharg, any Iranian oil-export move, any attack on the UAE, or any major development, and will lower the alert to HIGH only once a durable de-escalation is confirmed and safe passage verified.
- **This is the one hundred and seventy-fifth edition.** Day 188 of the war.

8. KEY POINTS

- **THE CYCLE IS POISED – AN APPARENT PAUSE, BUT MAJOR ESCALATION THREATENED.** There are no confirmed major new strikes in the latest period, an apparent pause after Tuesday's exchange. But President Trump threatens to strike Kharg Island (Iran's main oil terminal) and Iran threatens to block all Gulf oil exports – grave escalation risks. The next moves will determine whether the cycle escalates or subsides; the situation is on a knife-edge.
- **THE KHARG ISLAND AND OIL-EXPORT THREATS.** Trump threatens to strike Iran's Kharg oil terminal – a major escalation beyond the military and tanker targets so far – though Iranian officials say Kharg is "calm" and not struck. Iran threatens that if it cannot export oil, "no one will be able to export oil" from the Gulf – a threat directly affecting the UAE. Either's realisation would sharply escalate the confrontation.
- **THE MEDIATORS PUSH FOR CESSATION – THE MAIN DE-ESCALATION HOPE.** Qatar has called for "an immediate and complete cessation of all military actions" and a return to the negotiating track, warning "we are all affected by this escalation," and is intensifying efforts with Pakistan and Oman. Iran's president maintains Iran would reciprocate if Washington honoured its June commitments. The apparent pause gives the mediators a window to work.
- **NO NEW DAMAGING STRIKE ON UAE TERRITORY.** There has been no new attack on the UAE in the latest period, beyond Sunday's intercepted drone, and no new damaging strike on UAE territory, ports or infrastructure. But Iran's threat to block all Gulf oil exports directly affects the UAE, a US strike on Kharg could prompt Iranian retaliation across the Gulf, and the US embassy in Qatar has issued a regional security alert. The threat remains acute; hold high readiness.
- **THE STRAIT A STRIKE ZONE; OIL ELEVATED.** The Strait remains a strike zone – tankers struck (the Sidr and Senegal Prosperity among them), the US and Iran exchanging strikes, the waterway mined and blockaded – and Iran threatens to block all Gulf oil exports. Oil has risen, with Brent around $91, and a strike on Kharg or an export blockade would sharply disrupt global supply. Suspend all Strait transits.
- **MAXIMUM HELD, HIGH READINESS – NO NEW DAMAGING STRIKE ON UAE TERRITORY. ONE HUNDRED AND SEVENTY-FIFTH EDITION. DAY 188.** The cycle is poised on a knife-edge – an apparent pause, grave escalation threatened, the mediators pushing for a stop. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, review sanctions exposure, and watch for a Kharg strike, an Iranian oil-export move, or a mediated cessation. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 3rd September 2026 – Information current as of 09:00 GMT

THE STRIKE CYCLE IS POISED ON A KNIFE-EDGE – THERE ARE NO CONFIRMED MAJOR NEW STRIKES IN THE LATEST PERIOD (AN APPARENT PAUSE AFTER TUESDAY'S EXCHANGE), BUT TRUMP THREATENS TO STRIKE KHARG ISLAND (IRAN'S MAIN OIL TERMINAL) AND IRAN THREATENS TO BLOCK ALL GULF OIL EXPORTS ("NO ONE WILL BE ABLE TO EXPORT OIL") – A THREAT DIRECTLY AFFECTING THE UAE.

THE REGION'S MEDIATORS – QATAR, PAKISTAN AND OMAN – ARE PUSHING HARD FOR "AN IMMEDIATE AND COMPLETE CESSATION OF ALL MILITARY ACTIONS" AND A RETURN TO TALKS, AND IRAN'S CONDITIONAL OFFER (RECIPROCATE IF WASHINGTON HONOURS ITS JUNE COMMITMENTS) STANDS. THERE IS NO CONFIRMED NEW DAMAGING STRIKE ON UAE TERRITORY, AND NO NEW ATTACK IN THE LATEST PERIOD, BUT THE THREAT IS ACUTE. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS.

THE NEXT MOVES – A KHARG STRIKE, AN IRANIAN OIL-EXPORT MOVE, OR A MEDIATED CESSATION – WILL DETERMINE WHETHER THE CYCLE ESCALATES OR SUBSIDES. WATCH

CLOSELY; PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND SEVENTY-FIFTH EDITION. DAY 188.