WESTMINSTER SECURITY

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UAE SITREP DOCUMENT

DAY 219, THE 206TH EDITION. THE SAUDI-BACKED OFFENSIVE TO RETAKE YEMEN'S RED SEA COAST HAS BEGUN, AND THE HOUTHIS CLAIM A STRIKE ON ARAMCO NEAR RIYADH (FIRE SEEN, CAUSE UNCONFIRMED BY SAUDI ARABIA). QALIBAF SAYS THE STRAIT WILL NOT OPEN UNTIL IRAN'S SEVEN CONDITIONS ARE MET, WHILE TEHRAN REVIEWS THE US COUNTERPROPOSAL. PRESIDENT TRUMP SAYS IRAN WILL END "THE EASY WAY OR THE HARD WAY". ANOTHER TANKER IS STRUCK IN THE STRAIT (AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY). A SENIOR ADVISER TO IRAN'S SUPREME LEADER WARNS THE UAE THAT "IMPORTED SECURITY HAS AN EXPIRATION DATE". NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

4 October 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠️ **MAXIMUM ALERT:** WASHINGTON HAS NOT ANNOUNCED ITS DECISION, TEHRAN HAS RESTATED ITS TERMS, AND THE SECOND FRONT IN YEMEN HAS MOVED FROM PREPARATION TO OPERATIONS. THE ALERT REMAINS AT MAXIMUM. Yemen's Presidential Leadership Council chairman, Rashad al-Alimi, announced on Saturday "the start of military operations to retake the remaining territories" held by the Houthis, with Saudi-led coalition support and air strikes on Sanaa and Saada. The Houthis claim to have struck Aramco facilities in Riyadh and the Khurais area; Reuters and AFP witnesses saw flames and heavy smoke near an Aramco site south of Riyadh on Saturday evening, but Saudi authorities have not confirmed an attack and the coalition calls the claim "misleading". In Tehran, Parliament Speaker Qalibaf said on Sunday that "the Strait of Hormuz will not be opened" until Iran's seven conditions are implemented. President Trump said the outcome would be "the easy way or the hard way". UKMTO reported on Sunday morning that a tanker in the Strait of Hormuz was struck by an unknown projectile, damaging its engine room; the crew is safe. This was a vessel at sea, with the cause unconfirmed, and not a strike 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:** A RESPONSE IS BEING DRAFTED; THE TERMS ARE HARDENING. On the easing side, Deputy Foreign Minister Gharibabadi says Tehran is reviewing the US counterproposal and preparing its own response, Foreign Minister Araghchi says "there is no military solution, nor any solution based on new sanctions", seven major producers (including Saudi Arabia, Iraq, Kuwait and Oman) have agreed to hold November output steady, and the IEA confirms 325 million barrels released from strategic stocks alongside the G7's 100 million. On the harder side: Qalibaf ties the Strait to seven conditions and says "the era of dragging out time and dictating unilateral demands is over"; President Trump frames the choice as "the easy way or the hard way"; the Yemen offensive has begun; the Houthis claim a strike near Riyadh; another tanker has been hit; and a senior adviser

to Iran's Supreme Leader has turned on the UAE over the three islands. The diplomatic thread is alive, but every party is negotiating from a harder position than a week ago.

⚠️ **ASSESSMENT:** THE RED SEA FRONT HAS OPENED IN EARNEST. THE US-IRAN DECISION IS STILL PENDING. THE ALERT STAYS AT MAXIMUM. The most consequential change in this period is in Yemen, not Washington. The Saudi-backed government offensive turns a threatened escalation into an active campaign along the Red Sea coast and Bab el-Mandeb, the route that carries Saudi crude around Hormuz, and the Houthi claim against Aramco near Riyadh (unconfirmed by Saudi Arabia) shows the retaliation risk to Gulf energy sites. On the main front, the outcome of Friday's Camp David meeting has not been announced; President Trump's remarks keep both paths open and remain an unreliable guide to timing. Tehran's position has been restated rather than shifted: it is drafting a reply, but Qalibaf has made the Strait conditional on terms Washington has so far rejected. For the UAE, the rhetorical pressure has moved up a level, from an individual MP on Friday to Ali Akbar Velayati, a long-serving adviser to the Supreme Leader, on Saturday. It is a warning in words, not a change of policy, and there is NO CONFIRMED STRIKE on UAE territory. The posture remains MAXIMUM with high readiness.

1. SITUATION SUMMARY: DAY 219, THE YEMEN OFFENSIVE BEGINS, IRAN RESTATES ITS TERMS, AND ANOTHER TANKER IS STRUCK

The war has widened on its southern flank while the central decision in Washington remains unannounced. On Saturday, Yemen's Presidential Leadership Council chairman Rashad al-Alimi declared the start of operations to retake Houthi-held territory, and the Saudi-led coalition reported 97 "precise targeting operations" on the Tor al-Baha front and the Taiz axis early on Sunday. The Houthis claimed ballistic missile and drone strikes on Aramco facilities in Riyadh and the Khurais area; fire and heavy smoke were witnessed near an Aramco site south of Riyadh on Saturday evening, but Saudi authorities have not confirmed an attack. In Washington, the outcome of Friday's Camp David meeting has not been announced. President Trump told reporters: "We have a decision that I will make about Iran. Iran has been decimated. So the only question is, it will either be the easy way or the hard way." In Tehran, the Foreign Ministry says the US counterproposal is under review and a response is being prepared, while Parliament Speaker Qalibaf told parliament on Sunday that the Strait will not open until Iran's seven conditions, based on the Islamabad memorandum, are implemented. At sea, UKMTO reported a tanker struck in the Strait of Hormuz on Sunday morning, with damage to the engine room and the crew safe; this was a vessel at sea, cause unconfirmed, and not a strike on UAE territory. For the UAE, Ali Akbar Velayati, an adviser to Iran's Supreme Leader, warned that "imported security has an expiration date" after the UAE raised its claim to the three islands at the UN. 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 Sunday 4 October)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. US decision pending; Iran restating terms; Yemen offensive under way. Complete departures; high readiness; suspend all Strait transits.
US decision-making	**DECISION PENDING.** No outcome announced from the 2 October Camp David meeting. Trump: "it will either be the easy way or the hard way." Hegseth calls the blockade "ironclad": "They have literally gotten nothing through."
US force posture	**BUILD-UP CONTINUING.** Theodore Roosevelt strike group and Makin Island amphibious group en route. All US bombers withdrawn from RAF Fairford after a 27 September security incident and five arrests in the UK (Iranian link unconfirmed).

Diplomacy	**REVIEWING, NOT AGREEING.** Gharibabadi: Tehran reviewing the US counterproposal and preparing a response. Baqaei: reopening requires an end to disruption of Iranian shipping and the lifting of sanctions. Sequencing unresolved.
Iran's posture	**TERMS RESTATED.** Qalibaf (4 Oct): the Strait "will not be opened" until seven conditions based on the Islamabad memorandum are implemented. Araghchi: "no military solution". Conditional threats against Gulf airports and US ships stand.
Strait incidents	**TANKER STRUCK (4 OCT).** UKMTO: tanker struck by unknown projectile in the Strait, engine room damaged, crew safe, no pollution. Fars claims the Ore Vinst was hit under US escort (unverified). At sea, cause unconfirmed, not a strike on UAE territory.
UAE rhetoric and flydubai	**VELAYATI WARNS THE UAE.** Adviser to the Supreme Leader, on the three islands: "imported security has an expiration date." FZ1073 co-pilot named as an Omani national; Abu Dhabi leads the probe. No Iranian link established.
Saudi and Yemen front	**OFFENSIVE LAUNCHED.** Al-Alimi declares operations to retake Houthi-held territory (3 Oct). Coalition: 97 operations early Sunday. Houthis claim Aramco strikes near Riyadh; fire seen; coalition calls claim "misleading". 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 split. Washington's decision is still pending, but the Red Sea front has moved into open operations, and that front now carries its own escalation risk to Gulf energy sites and to the route around Hormuz. Nothing has touched UAE territory. The alert stays at MAXIMUM with high readiness.

2. THE DIPLOMACY: A REPLY IN PREPARATION, AND SEVEN CONDITIONS FOR THE STRAIT

- **Tehran reviewing the counterproposal:** Deputy Foreign Minister Kazem Gharibabadi said on Saturday that Tehran is reviewing the US counterproposal on reopening the Strait of Hormuz and is preparing its own response (CBS). Foreign Ministry spokesman Esmaeil Baqaei said reopening the Strait requires "an end to the disruptions to Iranian commercial maritime traffic and the lifting of sanctions". No formal reply had been reported by the cutoff.
- **Qalibaf's seven conditions:** Opening Sunday's parliamentary session, Speaker Mohammad Baqer Qalibaf, who led Iran's delegation in the earlier direct talks, said: "Until our seven conditions based on the Islamabad Memorandum of Understanding are implemented, the Strait of Hormuz will not be opened." He confirmed that Washington had recently sent proposals through a mediator, without giving details, and said "the era of dragging out time and dictating unilateral demands is over" (AP). The seven conditions were not listed; reporting associates them with a regionwide ceasefire, the release of frozen assets, the lifting of oil sanctions and an end to the blockade (to be verified).
- **The substance of the dispute:** Al Jazeera reports that the US is prioritising the nuclear file while Iran treats the reopening of the Strait as its primary objective. One Iranian account describes the US counterproposal as a restatement of earlier denuclearisation terms; we have not seen that characterisation from an official source and treat it as unverified.
- **Araghchi's line:** Foreign Minister Abbas Araghchi said: "There is no military solution, nor any solution based on new sanctions," adding that only negotiations based on justice could end the conflict, and warned of a stronger response to any renewed military confrontation.
- **The President's line:** President Trump told reporters: "We have a decision that I will make about Iran. Iran has been decimated. So the only question is, it will either be the easy way or the hard way." Asked about his plans, he said: "If I told you, you'd have a major story, right? But you will see." Energy Secretary Chris Wright said the President had been "well aware of the risks to energy flows" before the war began.

WS Assessment: Both sides are still talking, but neither has moved. Iran is drafting a reply while publicly fixing the Strait to conditions the US has rejected, and Washington is keeping both the diplomatic and the military path open. Hold posture until a sequence is agreed and implemented.

3. THE US DECISION, THE BLOCKADE, AND ANOTHER TANKER STRUCK

- **No announcement from Camp David:** No outcome has been announced from Friday's unannounced Camp David meeting, chaired by Vice President Vance, on resuming major combat operations against Iran and on a Saudi request for US strikes on the Houthis. The President's "easy way or the hard way" remark is consistent with a decision still pending; it does not tell us its timing or content.
- **The blockade:** Defense Secretary Pete Hegseth described the US blockade of Iranian ports as "ironclad", saying: "They have literally gotten nothing through." CENTCOM's most recent published figure, as of 30 September, is 125 commercial vessels redirected; we found no newer CENTCOM release in this period.
- **Another tanker struck:** UKMTO reported on Sunday morning that the master of a tanker transiting the Strait of Hormuz reported being struck by an unknown projectile, which damaged the engine room. The crew is safe and no environmental impact was reported. UKMTO did not identify the vessel or give the time of the strike. Separately, Fars, which is affiliated with the IRGC, claims that a tanker named Ore Vinst was hit while travelling under US escort toward Oman; the US had not responded and we have not verified the claim or whether the two reports refer to the same vessel. This was shipping at sea, cause unconfirmed, and not a strike on UAE territory. No party has claimed responsibility.
- **The tempo at sea:** This is at least the fourth tanker reported struck in or near the Strait since 1 October. UKMTO's weekly report of 2 October records 91 incidents of damage to vessels in the region since February (Middle East Eye).
- **A UK angle:** CBS reports that the US Air Force has withdrawn all bombers from RAF Fairford following a security incident on 27 September in which five British nationals were arrested on suspicion of terrorism offences. Any connection to Iran is unconfirmed.

WS Assessment: The US decision is still the hinge of the main front, and the tanker strikes in the Strait continue at a steady rate. Clients should treat the Strait as closed to their vessels and hold readiness.

4. THE UAE: A SENIOR IRANIAN WARNING OVER THE ISLANDS, 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. Sunday's tanker incident was in the Strait, at sea, with the cause unconfirmed.
- **Velayati turns on the UAE:** Ali Akbar Velayati, an adviser to Iran's Supreme Leader, responded on Saturday to the UAE's claim at the UN General Assembly to Greater Tunb, Lesser Tunb and Abu Musa. "A country whose political life does not reach half a century makes claims from the UN podium about islands that have been recorded under Iran's name," he said, adding: "The neighbour stays, and the guest goes. Regional experience has shown that imported security has an expiration date." On the Netanyahu visit he said: "One week after warmly hosting Netanyahu, speaking of 'Arab rights' and 'Islamic solidarity' is more of a contradiction than a claim" (Press TV, Dawn). We found no UAE response by the cutoff.
- **Why it matters:** Velayati carries more weight than the individual MP who called on Friday for the UAE to be occupied. His remarks are a warning in words, not an announced change of policy, but they join the islands dispute to Iran's anger over the Netanyahu visit and its listing of UAE-linked tankers, and they mark the UAE as a focus of Iranian hostility if fighting resumes.
- **The flydubai investigation:** Al Jazeera identifies the FZ1073 co-pilot as Hamam al-Hammami, an Omani national born in the UAE, and reports that Omani authorities had previously barred him from flying over concerns about extremist views. Abu Dhabi is leading the investigation into the motives and connections, including whether he acted alone. UAE Prosecutor General Hamad Saif al-Shamsi said the suspect "assaulted the captain in the cockpit using the emergency axe". No Iranian link has been established.
- **Aviation:** DXB, DWC and AUH are operating. Gulf News reports suspensions by Air France, KLM, Wizz Air, Singapore Airlines, ITA Airways and airBaltic to 24 October, Lufthansa resuming on 25 October, British Airways in November, Cathay Pacific to 31 January 2027, Finnair to 27 March 2027 and Virgin Atlantic to October 2027; Korean Air is suspended indefinitely. flydubai has suspended Israel flights and Emirates its Tel Aviv codeshare; the UAE's suspension of Iranian airlines stands. Confirm dates directly with each carrier.

WS Assessment: The UAE has not been struck. The rhetorical pressure has moved from a backbench MP to a senior adviser to the Supreme Leader, and it now draws on the islands dispute as well as the Netanyahu visit. It is not policy, but it raises the profile of the UAE in Iranian messaging. Hold high readiness.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait contested, the blockade enforced:** Iran says the Strait stays shut to normal traffic until its conditions are met, and the US says the blockade is holding. Gulf News reports that 19 LNG cargoes passed through Hormuz in September, the highest monthly level since the war began, including six from the UAE. There is still no verified safe passage, and the Strait does not meet the reopening test in our de-escalation gate.
- **Oil:** Brent settled at $99.74 on Friday; markets were closed over the weekend. Seven major producers (Saudi Arabia, Russia, Iraq, Kuwait, Kazakhstan, Algeria and Oman) agreed to hold November production steady. The IEA confirms 325 million barrels released from strategic reserves, with the G7 committing a further 100 million over four months. CBS, citing Kpler, reports that Middle East exports excluding Iran have exceeded pre-war levels at 16.5 million barrels a day; that conflicts with Kpler's September data (12.8 million against a pre-war 18.8 million) and is to be verified.
- **The Yemen offensive begins:** Rashad al-Alimi, head of Yemen's Presidential Leadership Council, announced on Saturday: "I announce today the start of military operations to retake the remaining territories." Government forces claim 257 operations on Saturday with about 700 Houthi casualties, and the coalition reported 97 operations early on Sunday, which government forces spokesman Colonel Majed al-Nazili said targeted at least 260 Houthi fighters and destroyed or disabled 44 vehicles. These are partisan claims and are not independently verified. More than 70 combatants were killed in a day of fighting in Taiz, according to figures from both sides.
- **Strikes on Sanaa:** Explosions were heard in Sanaa through Saturday. Houthi media reported dozens of Saudi air strikes on the capital, and Yemen's government-aligned military said it had struck "vital targets" in Sanaa and Saada (AP).
- **The Houthi claim on Aramco:** Houthi military spokesman Yahya Saree claimed a "military operation with ballistic missiles and drones" against Aramco in Riyadh and the Khurais area, about 90 miles south-east of Riyadh, saying it caused fires. Reuters and AFP witnesses reported flames and heavy smoke near an Aramco facility south of Riyadh on Saturday evening. Saudi authorities and Aramco have not confirmed an attack or its cause, and coalition spokesman Turki al-Maliki called the Houthi claims "misleading", saying the group was "attempting to divert attention from the scale of the losses". The cause of the fire is unconfirmed.
- **The wider picture:** The Houthis hold the Red Sea coast, including Mocha, and maintain their blockade of Saudi shipping; the proposed Saudi-Houthi truce has not been agreed. The UN Population Fund reports more than 145,000 people displaced by the renewed fighting. The Makkah defence pact committee (Pakistan, Saudi Arabia and Türkiye) is due to meet in Riyadh this week on the Houthi attacks.

WS Assessment: The offensive in Yemen is now the most active escalation path in the region. If the Houthi claim against Aramco is confirmed, it would mark a return to strikes on Saudi energy infrastructure near the capital. UAE-linked operators should continue to suspend all Strait transits and review Red Sea exposure pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **A pending decision, a new front, and no confirmed strike on UAE territory.** The US decision on Iran is still pending, the Saudi-backed offensive in Yemen has begun, another tanker has been struck in the Strait, and a senior adviser to Iran's Supreme Leader has warned the UAE. 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 and several foreign carriers suspended to late October or longer. 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.** Brent remains close to $100 and refined products are tight. A confirmed Houthi strike on Saudi energy sites would add to the pressure. Keep water, fuel and generator contingencies ready; the Fujairah route continues to provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS.** Another tanker was struck in the Strait on Sunday, at least the fourth since 1 October, 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, review Red Sea and Bab el-Mandeb routing in light of the Yemen offensive, 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-led investigation into the flydubai attack, and review travel arrangements for staff on affected routes.

Return Guidance: MAXIMUM Held, High Readiness, a New Front in Yemen

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 decision on Iran is pending, Iran has tied the Strait to seven conditions, the Saudi-backed offensive in Yemen has begun, another tanker has been struck in the Strait, and a senior Iranian adviser has warned the UAE. 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 reply in preparation 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 Yemen offensive and Houthi strikes on Saudi Arabia, 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, a widening of the Yemen war to Gulf energy sites, 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 US decision pending, Iran restating its terms, an offensive under way in Yemen, another tanker struck in the Strait, senior Iranian rhetoric aimed at 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 pending, a front opened.** No outcome has been announced from Friday's Camp David meeting, and President Trump frames the choice as "the easy way or the hard way". The Saudi-backed offensive in Yemen began on 3 October. A tanker was struck in the Strait on 4 October (at sea, cause unconfirmed). There is no confirmed strike on UAE territory.
- **WATCH FOR THE DECISION AND THE REPLY, NOT THE RHETORIC.** The outcome of the US deliberations and the content of Iran's reply to the counterproposal are the indicators that matter. Qalibaf's conditions and the President's remarks are signals; hold posture until a sequence is agreed and implemented.
- **NOTE THE SENIOR IRANIAN WARNING TO THE UAE.** Velayati's remarks on the islands and "imported security" are not policy, but they come from close to the Supreme Leader and follow Friday's call by an MP to occupy the UAE. Hold high readiness for the airports threat.
- **TREAT THE RED SEA AS AN ACTIVE ESCALATION PATH.** The Yemen offensive is under way, Houthi strikes on Saudi Arabia continue, and a claimed strike near Riyadh is unconfirmed. Review exposure on the Red Sea and Bab el-Mandeb routes and continue to use the Fujairah route.
- **KEEP UAE-LINKED VESSELS OUT OF THE STRAIT.** Tankers continue to be struck in and near the Strait. 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) Iran's formal reply to the US counterproposal; (3) Iran's warned retaliation against US ships and Gulf airports; (4) Iranian action against UAE-linked shipping; (5) the course of the Yemen offensive, confirmation of the Aramco incident, and any US strikes in Yemen; (6) further senior Iranian statements toward the UAE; (7) any strike on UAE territory.
- **A decision pending. 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, any confirmed strike on Gulf energy infrastructure, 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 sixth edition.** Day 219 of the war.

8. KEY POINTS

- **THE YEMEN OFFENSIVE HAS BEGUN.** Rashad al-Alimi announced operations to retake Houthi-held territory on 3 October; the coalition reported 97 operations early on 4 October. The Houthis claim strikes on Aramco near Riyadh; fire was seen, but Saudi Arabia has not confirmed an attack and the coalition calls the claim “misleading”.
- **IRAN RESTATES ITS TERMS.** Qalibaf: the Strait “will not be opened” until seven conditions based on the Islamabad memorandum are implemented. Tehran is reviewing the US counterproposal and preparing a response; no reply had been reported by the cutoff.
- **A US DECISION STILL PENDING.** No outcome announced from the Camp David meeting. President Trump: “it will either be the easy way or the hard way.” Hegseth calls the blockade “ironclad”.
- **ANOTHER TANKER STRUCK IN THE STRAIT.** UKMTO reports a tanker hit by an unknown projectile on 4 October, engine room damaged, crew safe. At sea, cause unconfirmed, not a strike on UAE territory. A Fars claim of a tanker hit under US escort is unverified.
- **A SENIOR IRANIAN WARNING TO THE UAE.** Velayati, an adviser to the Supreme Leader, on the three islands: “imported security has an expiration date.” Not policy, but a step up from Friday’s MP. The flydubai co-pilot is named as an Omani national; no Iranian link established.
- **MAXIMUM HELD, HIGH READINESS. NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDRED AND SIXTH EDITION. DAY 219.** A US decision pending, Iran restating its terms, a new front open in Yemen, another tanker struck, and senior Iranian rhetoric aimed at 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 4th October 2026. Information current as of 09:00 GMT.

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ANOTHER TANKER WAS STRUCK IN THE STRAIT ON 4 OCTOBER: A VESSEL AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY. A SENIOR ADVISER TO IRAN’S SUPREME LEADER HAS WARNED THE UAE OVER THE THREE ISLANDS. 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 AND THE REPLY, NOT THE RHETORIC; NOTE THE SENIOR IRANIAN WARNING TO THE UAE AND THE AIRPORTS THREAT; TREAT THE RED SEA AS AN ACTIVE ESCALATION PATH; AND KEEP UAE-LINKED VESSELS OUT OF THE STRAIT. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND SIXTH EDITION. DAY 219.