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DAY 190 – THE ESCALATION MAY BE APPROACHING A PLATEAU: AFTER THE CYCLE WIDENED THROUGH THURSDAY (IRAN'S ATTACK ON KUWAIT; OIL NEAR $97), PRESIDENT TRUMP HAS SIGNALLED HE DOES NOT EXPECT THE HOSTILITIES TO ESCALATE INTO A RETURN TO WAR AND THAT THE FIGHTING WILL NOT LAST "VERY MUCH LONGER," AND THE MEDIATORS (QATAR, PAKISTAN, OMAN) PUSH FOR A CESSATION – BUT NOTHING IS RESOLVED, THE KHARG AND OIL-EXPORT THREATS PERSIST – NO NEW DAMAGING STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

5 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE ESCALATION MAY BE APPROACHING A PLATEAU – BUT NOTHING HAS BEEN RESOLVED, AND THE ALERT REMAINS AT MAXIMUM. After the cycle widened through Thursday – with Iran firing missiles and drones at Kuwait, extending its retaliation across the Gulf, and oil surging to near $97 – President Trump has signalled that he does not expect the current round of hostilities to escalate into a return to war, saying the fighting will not last "very much longer," and the region's mediators – Qatar, Pakistan and Oman – continue pushing hard for an immediate cessation and a return to talks. But no cessation has been confirmed, the strike exchange has occurred, President Trump's threat to strike Kharg Island stands, and Iran's threat to block all Gulf oil exports persists. 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 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:** TENTATIVE SIGNS OF A PLATEAU – BUT DO NOT MISTAKE THEM FOR A DE-ESCALATION. There are, for the first time this week, tentative signs that the escalation may be topping out rather than spiralling: President Trump has indicated he does not expect a return to full war and that the fighting will end soon, the mediators are pushing hard for a cessation, Iran's conditional off-ramp stands, and there has been no confirmed further escalation – no Kharg strike and no new attack on the UAE – in the latest period. Together these suggest the current round may be intended as a limited, punitive exchange rather than a full re-escalation. But three cautions are essential. First, nothing has been resolved: no cessation is confirmed, and the strike exchange, the Kharg threat and Iran's oil-export threat all persist. Second, President Trump's signals have repeatedly proved unreliable in this war, with apparent de-escalations followed by renewed escalation. Third, the cycle could still widen – a Kharg strike, an Iranian oil-export move, or a renewed attack on the UAE remain possible. For UAE clients, the posture must remain at its most cautious until a de-escalation is confirmed: MAXIMUM, high readiness, complete departures, suspend all Strait transits. There is NO NEW DAMAGING STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 190 – A POSSIBLE PLATEAU, NOTHING RESOLVED

The escalation of the past week may be approaching a plateau, but nothing has been resolved and the situation remains dangerous. After the cycle widened through Thursday – with Iran firing missiles and drones at Kuwait, extending its retaliation across the Gulf Arab states that host US forces, and oil prices surging to near $97 a barrel – there are, for the first time this week, tentative signs that the escalation may be topping out. President Trump has indicated that he does not expect the current round of hostilities to escalate into a return to war, saying the fighting will not last very much longer, and the region's mediators – Qatar, Pakistan and Oman – continue to push hard for an immediate cessation and a return to talks, with Iran's conditional offer to reciprocate if Washington honours its June commitments still on the table. There has, moreover, been no confirmed further escalation in the latest period – no strike on Iran's Kharg Island oil terminal, and no new attack on the UAE. But no cessation has been confirmed, the strike exchange has occurred, President Trump's threat to strike Kharg stands, and Iran's threat to block all Gulf oil exports persists; and President Trump's signals have repeatedly proved unreliable in this war. 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 Saturday 5 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. A possible plateau, but nothing resolved. Complete departures; high readiness; suspend all Strait transits.
Trump signal	**POSSIBLE PLATEAU.** Trump does not expect the hostilities to escalate into a return to war; the fighting will not last "very much longer" – but his signals are unreliable.
Further escalation	**NONE CONFIRMED.** No confirmed Kharg strike, no new attack on the UAE, in the latest period – the cycle has not visibly widened further.
Mediation	**PUSHING FOR CESSATION.** Qatar, Pakistan and Oman continue pushing for an immediate cessation; Iran's conditional off-ramp stands.
But unresolved	**THREATS PERSIST.** No cessation confirmed; the strike exchange occurred; Trump's Kharg threat stands; Iran's all-Gulf oil-export threat persists.
Oil	Surged to near $97 (up ~7% this week) on the week's escalation. Elevated risk premium remains.
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 tentative signs of a plateau – Trump's signal, the mediation push, the absence of confirmed further escalation – are the first this week that the escalation may be topping out; but nothing is resolved, the threats persist, and Trump's signals are unreliable. The alert stays at MAXIMUM with high readiness, and clients should not mistake a possible plateau for a de-escalation; watch for confirmation of a cessation, or for renewed escalation.

2. SIGNS OF A POSSIBLE PLATEAU – TRUMP SIGNALS LIMITED FIGHTING; THE MEDIATORS PUSH

- **Trump signals limited fighting:** President Trump has indicated that he does not expect the current round of hostilities to escalate into a return to war, and has said of the fighting that he does not think it will be "very much longer" – a signal that Washington may intend the current exchange as a limited, punitive round rather than a full re-escalation of the war.
- **Consistent with the "little war" framing:** The signal is consistent with President Trump's earlier characterisation of the exchange as a "relatively little war," and with the assessment that the US strikes have been targeted – aimed at Iran's mining capability and its ability to attack shipping – rather than a broadening of the war's aims; the US may be seeking to punish and deter rather than to escalate.
- **No confirmed further escalation:** There has been no confirmed further escalation in the latest period: no strike on Iran's Kharg Island oil terminal, despite the threat, and no new attack on the UAE; the cycle has not visibly widened further since Thursday's attack on Kuwait, which may indicate a pause or a topping-out.
- **The mediators push hard:** The region's mediators – Qatar, Pakistan and Oman – continue to push hard for an immediate cessation of the strikes and a return to the negotiating track; Qatar has called for an immediate and complete cessation of all military actions, and the mediators are the main hope for converting a possible plateau into a genuine de-escalation.
- **Iran's off-ramp stands:** Iran's conditional offer to reciprocate immediately if Washington honours its commitments under the June memorandum remains on the table, giving the mediators a basis on which to seek a de-escalation; the combination of the US signal, the mediation push, and Iran's off-ramp offers a possible path out of the current round.

WS Assessment: The signs of a possible plateau – Trump's signal that the fighting will end soon, the absence of confirmed further escalation, and the hard mediation push – are genuinely the first this week that the escalation may be topping out, and offer a possible path to de-escalation. But they are signals and hopes, not a confirmed cessation, and clients should watch for confirmation rather than act on them.

3. BUT NOTHING IS RESOLVED – THE THREATS PERSIST

- **No cessation confirmed:** Despite the tentative signs, no cessation of the strikes has been confirmed; the strike exchange of the past week – the US strikes inside Iran, Iran's attacks on US bases in Jordan, on the UAE and on Kuwait, and the tanker strikes – has occurred, and the situation remains one of active, if possibly pausing, conflict.
- **The Kharg threat stands:** President Trump's threat to strike Kharg Island – Iran's principal oil export terminal – stands; a strike on its oil infrastructure would be a major escalation and would sharply disrupt oil supply, and the threat remains a serious risk despite the tentative signs of a plateau.
- **Iran's oil-export threat persists:** Iran's threat that if it is prevented from exporting oil, no one will be able to export oil from the Persian Gulf, persists – a threat directly affecting the UAE and the other Gulf producers; the Kuwait attack demonstrated Iran's willingness to strike across the Gulf, and the threat cannot be discounted.
- **Trump's unreliability:** President Trump's signals have repeatedly proved unreliable in this war: on several occasions apparent de-escalations – announced halts, claimed talks – have been followed within days by renewed escalation. His indication that the fighting will end soon should therefore be treated with caution, not as a reliable guide.
- **The cycle could still widen:** The cycle could still widen: a US strike on Kharg, an Iranian move to block Gulf oil exports, a renewed attack on the UAE, or an Iranian attack on Israel during the Jewish holidays all remain possible, and any would sharply escalate the confrontation; the possible plateau is fragile and unconfirmed.

WS Assessment: The tentative signs of a plateau are set against a picture in which nothing has been resolved, the threats persist, and President Trump's signals are unreliable; the possible plateau is fragile and could give way to renewed escalation. Clients should hold their posture at MAXIMUM with high readiness until a de-escalation is confirmed, and watch closely for either a cessation or a renewed escalation.

4. THE UAE; THE REGIONAL PICTURE

- **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 confirmed 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 possibly plateaued.
- **But the threat remains acute:** The threat to the UAE remains acute: Iran struck Kuwait on Thursday, demonstrating its willingness to strike Gulf US hosts, and the UAE remains exposed; Iran's oil-export threat directly affects the UAE, and a renewed escalation could again bring attacks on the country.
- **The US security posture:** US security alerts for the region, warning of the potential for unforeseen escalation and urging heightened vigilance amid possible flight cancellations and airspace closures, remain relevant; the threat environment across the Gulf remains heightened, and clients should hold high readiness.
- **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 a renewed escalation could widen the arena further.
- **Oil elevated:** Oil prices have surged to near $97, up more than 7% over the week, on the week's escalation; a confirmed de-escalation would ease prices, while a renewed escalation – particularly a strike on Kharg or an export blockade – would drive them higher still.

WS Assessment: The absence of a new attack on the UAE and the tentative signs of a plateau are modest reliefs, but the threat to the UAE remains acute given the week's escalation and the persisting threats. Clients should hold high readiness and watch closely for either a confirmed de-escalation or a renewed escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait a strike zone:** The Strait remains a strike zone – tankers have been struck, the US and Iran have exchanged strikes, the waterway is mined and blockaded, and the cycle has widened across the Gulf; transit remains acutely dangerous, and Iran's threat to block all Gulf oil exports persists.
- **Oil surges:** Oil has surged to near $97, up more than 7% this week, on the week's escalation; the risk premium remains elevated, and a strike on Kharg or an Iranian export blockade would drive prices higher, while a confirmed de-escalation would ease them.
- **The contested US oil claim:** The US claims a record volume of oil – more than 17 million barrels – transited the Strait on Monday under military protection, against roughly 20 million barrels a day before the war; whatever the true figure, the tanker attacks confirm that transit remains perilous.
- **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 remain active, with the direct US-Iran exchange the dominant dynamic and the cycle possibly plateauing.
- **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 with oil elevated; the danger to shipping is acute despite the tentative signs of a plateau. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed, durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **A possible plateau – but the threat acute, and no new damaging strike on UAE territory.** The escalation may be plateauing, and there has been no new attack on the UAE in the latest period. But nothing is resolved, the threats persist, and Iran struck Kuwait on Thursday. There is no confirmed new damaging strike on UAE territory, ports or infrastructure, but the threat remains acute, and Iran's oil-export threat directly affects the UAE.
- **COMPLETE DEPARTURES NOW – THE PLATEAU IS UNCONFIRMED.** With airports operating, complete any deferred non-essential departure on scheduled commercial flights without delay. The possible plateau is unconfirmed and the threat acute; completing departures now is prudent, and the window should not be assumed to remain open.
- **HOLD READINESS AT A HIGH LEVEL – WATCH FOR RENEWED ESCALATION.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the cycle could still widen, and the UAE could be targeted again. 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.** Review exposure to Iran-related sanctions risk through exchange houses, trade finance, shipping and re-export, and watch for new designations given the escalation; 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 have exchanged 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 – a Possible Plateau, Nothing Resolved

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The escalation may be approaching a plateau – Trump signals limited fighting, the mediators push for a cessation, there has been no confirmed further escalation – but nothing is resolved, the threats persist, and Trump's signals are unreliable. Clients should complete departures now, hold high readiness, suspend all Strait transits, and watch for a confirmed cessation or a renewed escalation.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation is confirmed; a possible, unconfirmed plateau 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; 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 confirmed cessation, a renewed escalation, any attack on the UAE, a US strike on Kharg, or an Iranian oil-export move.
- **Business/compliance clients:** 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 confirmed 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 tentative signs of a plateau and the mediation push are a possible start, but nothing is confirmed; Westminster

Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.

- **Further escalation – still possible:** A US strike on Kharg, an Iranian move to block Gulf oil exports, a renewed attack on the UAE, 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 – a possible plateau but nothing resolved, the threats persisting; 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 – a possible plateau, nothing resolved.** After the cycle widened through Thursday (Iran's attack on Kuwait; oil near $97), Trump signals he does not expect a return to war and that the fighting will not last "very much longer," and the mediators push for a cessation. But nothing is resolved – the strike exchange occurred, Trump's Kharg threat stands, Iran's oil-export threat persists. There is no new damaging strike on UAE territory, but the threat is acute.
- **DO NOT MISTAKE A POSSIBLE PLATEAU FOR A DE-ESCALATION.** The tentative signs – Trump's signal, the mediation push, no confirmed further escalation – are encouraging but unconfirmed, and Trump's signals are unreliable. Await a confirmed cessation before easing posture; the cycle could still widen.
- **HOLD HIGH READINESS; COMPLETE DEPARTURES NOW.** The threat to the UAE remains acute and the plateau unconfirmed. Complete deferred non-essential departures on scheduled flights, keep shelter and evacuation readiness current, and do not assume the window remains open.
- **SUSPEND ALL STRAIT TRANSITS.** The Strait is a strike zone – tankers struck, the US and Iran exchanging strikes, the waterway mined and blockaded. Suspend all transits until a durable de-escalation is confirmed.
- **NOTE THE MEDIATION PUSH – THE PATH OUT.** Qatar, Pakistan and Oman continue pushing for a cessation, and Iran's conditional offer stands; the mediation is the main hope for converting a possible plateau into a de-escalation. Watch whether it secures a cessation.
- **Monitor for:** (1) a confirmed cessation of the strikes; (2) any renewed attack on the UAE or damaging strike on UAE territory; (3) a US strike on Kharg; (4) an Iranian oil-export move; (5) an Iranian attack on Israel.
- **A possible plateau, nothing resolved – emergency updates to follow.** Westminster Security will issue immediate updates on any confirmed cessation, any renewed escalation, 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-seventh edition.** Day 190 of the war.

8. KEY POINTS

- **THE ESCALATION MAY BE APPROACHING A PLATEAU.** After the cycle widened through Thursday (Iran's attack on Kuwait; oil near $97), there are, for the first time this week, tentative signs of a topping-out: Trump signals he does not expect a return to war and that the fighting will not last "very much longer," the mediators push for a cessation, and there has been no confirmed further escalation. But nothing is resolved, and the signals are unconfirmed.
- **BUT NOTHING IS RESOLVED – THE THREATS PERSIST.** No cessation has been confirmed; the strike exchange has occurred; President Trump's threat to strike Kharg Island stands; and Iran's threat to block all Gulf oil exports persists. President Trump's signals have repeatedly proved unreliable in this war. The possible plateau is fragile, and the cycle could still widen – a Kharg strike, an oil-export move, or a renewed attack on the UAE remain possible.
- **THE MEDIATORS PUSH FOR CESSATION – THE PATH OUT.** Qatar, Pakistan and Oman continue pushing hard for an immediate cessation and a return to talks, and Iran's conditional offer to reciprocate if Washington honours its June commitments stands. The mediation is the main hope for converting a possible plateau into a genuine de-escalation; clients should watch whether it secures a cessation.
- **NO NEW DAMAGING STRIKE ON UAE TERRITORY – BUT THE THREAT ACUTE.** 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 struck Kuwait on Thursday, demonstrating its willingness to strike Gulf US hosts, and Iran's oil-export threat directly affects the UAE. The threat remains acute; hold high readiness.
- **THE STRAIT A STRIKE ZONE; OIL ELEVATED.** The Strait remains a strike zone – tankers struck, the US and Iran exchanging strikes, the waterway mined and blockaded – and oil has surged to near $97, up more than 7% this week. A strike on Kharg or an Iranian export blockade would drive prices higher, while a confirmed de-escalation would ease them. Suspend all Strait transits until a durable de-escalation is confirmed.
- **MAXIMUM HELD, HIGH READINESS – NO NEW DAMAGING STRIKE ON UAE TERRITORY. ONE HUNDRED AND SEVENTY-SEVENTH EDITION. DAY 190.** The escalation may be approaching a plateau, but nothing is resolved and the threats persist; the possible plateau is fragile and unconfirmed. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, review sanctions exposure, and watch for a confirmed cessation or a renewed escalation. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 5th September 2026 – Information current as of 09:00 GMT

THE ESCALATION OF THE PAST WEEK MAY BE APPROACHING A PLATEAU – AFTER THE CYCLE WIDENED THROUGH THURSDAY (IRAN'S ATTACK ON KUWAIT; OIL NEAR $97), PRESIDENT TRUMP HAS SIGNALLED HE DOES NOT EXPECT THE HOSTILITIES TO ESCALATE INTO A RETURN TO WAR AND THAT THE FIGHTING WILL NOT LAST "VERY MUCH LONGER," THE MEDIATORS (QATAR, PAKISTAN, OMAN) PUSH FOR A CESSATION, AND THERE HAS BEEN NO CONFIRMED FURTHER ESCALATION.

BUT NOTHING IS RESOLVED – NO CESSATION IS CONFIRMED, THE STRIKE EXCHANGE OCCURRED, TRUMP'S THREAT TO STRIKE KHARG ISLAND STANDS, AND IRAN'S THREAT TO BLOCK ALL GULF OIL EXPORTS PERSISTS; AND TRUMP'S SIGNALS ARE UNRELIABLE. THERE IS NO CONFIRMED NEW DAMAGING STRIKE ON UAE TERRITORY, AND NO NEW ATTACK IN THE LATEST PERIOD, BUT THE THREAT REMAINS ACUTE. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS.

DO NOT MISTAKE A POSSIBLE PLATEAU FOR A DE-ESCALATION – THE MEDIATION IS THE PATH OUT; WATCH FOR A CONFIRMED CESSATION OR A RENEWED ESCALATION (A

KHARG STRIKE, AN OIL-EXPORT MOVE, OR A RENEWED ATTACK ON THE UAE). PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND SEVENTY-SEVENTH EDITION. DAY 190.