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DAY 166 – THE STALEMATE PERSISTS BUT THE MARITIME WAR INTENSIFIES: THE US DISABLES A CARGO SHIP WITH HELLFIRE MISSILES ENFORCING THE BLOCKADE, AND THE HOUSHI RED SEA CAMPAIGN TURNS DEADLY – A SAUDI VESSEL STRUCK IN THE BAB AL-MANDEB KILLS THREE – MAXIMUM HELD

Prepared for the CEO

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🚩 MIXED SIGNALS: A FROZEN STALEMATE OVERLAYING AN INTENSIFYING MARITIME WAR. The diplomatic and direct-strike stalemate persists, but the conflict on the water has escalated sharply on both chokepoints over the past day. On the Strait, the US enforced its blockade with force, disabling a Panama-flagged cargo ship – the M/V Vela Nova – by firing two Hellfire missiles into its engine room from a US Navy helicopter after the vessel attempted to reach an Iranian port and ignored repeated warnings; it is the third ship the US has disabled under the blockade. On the Red Sea, the Houthi campaign turned deadly for the first time: a Saudi-owned commercial vessel was reportedly struck by a missile in the Bab al-Mandeb, killing three crew members. Meanwhile the deal remains stalled – both sides have raised the bar, and President Trump’s claim that the Strait is “open” is contradicted by shipping data. The pause in direct US-Iran strikes holds. There is NO NEW CONFIRMED STRIKE ON UAE TERRITORY, and the UAE remains a mediating party.

⚠️ MAXIMUM ALERT: THE ALERT REMAINS AT MAXIMUM – THE MARITIME WAR IS ESCALATING AND TURNING DEADLY. While the direct US-Iran strike pause holds and the diplomatic stalemate persists, the conflict on the two principal waterways has intensified. The US firing Hellfire missiles into a cargo ship to enforce the blockade marks a new level of kinetic enforcement in the Gulf of Oman; the first fatal strike on commercial shipping in the Red Sea, killing three, marks a dangerous escalation of the Houthi campaign. The blockade continues, with three vessels now disabled; the Strait remains effectively closed; and Iran’s standing threat to retaliate against Gulf energy infrastructure if attacked continues to apply to the UAE. Each maritime incident carries the risk of miscalculation reigniting the direct conflict. There is NO NEW CONFIRMED STRIKE ON UAE TERRITORY. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, and continues to advise clients to use the pause to complete departures and hold readiness.

⚠️ ASSESSMENT: THE FRICTION HAS MOVED TO THE WATER – AND THE HUMAN COST IS RISING. The pattern of the war is now clear: a frozen diplomatic and direct-strike stalemate overlaying an intensifying maritime conflict. With a deal receding and both sides content to wait, the friction has shifted to the two chokepoints, where the US is enforcing its blockade by force and Iran’s Houthi proxies are escalating in the Red Sea, now with fatalities. This is a dangerous dynamic: the

direct pause holds, but the space between a contained maritime conflict and a renewed direct war is narrow, and each incident – a US strike on a blockade-runner, a fatal Houthi attack on a Saudi vessel – carries the risk of a response that widens the fighting. The human cost, largely borne so far by seafarers, is now rising. For UAE clients the two takeaways are that the Strait and the Red Sea are both active, lethal conflict zones, so transit remains inadvisable, and that the underlying threat to Gulf energy and water infrastructure is undiminished. The posture is unchanged: MAXIMUM, use the pause to complete departures, hold readiness, and protect energy and water resilience. There is no new confirmed strike on UAE territory.

1. SITUATION SUMMARY: DAY 166 – STALEMATE ABOVE, ESCALATION ON THE WATER

The war has settled into a distinctive and dangerous pattern: a frozen stalemate in the diplomacy and in the direct US-Iran exchange, overlaying an intensifying and increasingly lethal conflict on the water. Over the past day, the maritime dimension escalated on both principal chokepoints. On the Strait of Hormuz and its approaches, the United States enforced its naval blockade with force, disabling a Panama-flagged cargo vessel, the M/V Vela Nova, by firing two Hellfire missiles into its engine room from a US Navy helicopter after the ship attempted to transit the Gulf of Oman toward an Iranian port and ignored repeated warnings – the third vessel the US has disabled under the blockade. On the Red Sea, the Iranian-backed Houthi campaign turned deadly for the first time, with a Saudi-owned commercial vessel reportedly struck by a missile in the Bab al-Mandeb, killing three crew members. Meanwhile the diplomatic stalemate is unbroken: no deal has been reached, both sides have raised the bar for reopening the Strait, and President Trump's claim that the waterway is "open" is contradicted by shipping data showing traffic remains minimal. The pause in direct US-Iran strikes holds. There is no new confirmed strike on UAE territory. Westminster Security holds the alert at MAXIMUM pending a signed, implemented deal and verified safe passage, and continues to advise clients to use the pause to complete departures and hold readiness.

Where Things Stand

Element	Status (as of 0900 GMT Wednesday 12 August)
Alert level	MAXIMUM (held). Both phases suspended. Use the pause to complete departures; hold readiness.
Blockade enforcement	KINETIC. US disabled the cargo ship M/V Vela Nova with two Hellfire missiles in the Gulf of Oman – a third vessel disabled under the blockade.
Red Sea	FIRST DEATHS. A Saudi-owned vessel was reportedly struck by a missile in the Bab al-Mandeb, killing three crew – the Houthi campaign turning deadly.
The deal	STALLED. No deal; both sides have raised the bar. Trump's claim the Strait is "open" is contradicted by shipping data.
Direct strikes	PAUSE HOLDS. No new direct US-Iran strikes; the pause holds, but the maritime conflict is escalating beneath it.
Iran leadership	Functioning but entrenched: Khamenei's six senior military appointments stand; he has still not appeared in public.
Strait / blockade	Effectively closed; traffic minimal. Blockade continues (three vessels disabled, two boarded, 40+ redirected).
UAE territory	No new confirmed strike. Both incidents were off the UAE (Gulf of Oman, Bab al-Mandeb). Airports open.

WS Assessment: The diplomatic and direct-strike stalemate is holding, but the war on the water is intensifying and, in the Red Sea, turning lethal. The US is now enforcing its blockade kinetically, and the Houthi campaign has claimed its first commercial-shipping fatalities in the Red Sea. Neither incident was on UAE territory, and the direct pause holds, but the maritime escalation raises the risk of miscalculation. The alert stays at MAXIMUM, and both the Strait and the Red Sea should be treated as active, lethal conflict zones.

2. THE US ENFORCES THE BLOCKADE WITH FORCE – A CARGO SHIP DISABLED

- **The strike:** The US military disabled a Panama-flagged cargo vessel sailing toward an Iranian port on Tuesday by firing two Hellfire missiles into its engine room, US Central Command announced. The M/V Vela Nova “attempted to transit the Gulf of Oman and violate the US blockade against Iran,” the CENTCOM statement said.
- **Warnings ignored:** The crew “ignored repeated warnings from American forces,” CENTCOM said, leading to a US Navy MH-60 helicopter firing the missiles and disabling the ship’s steering gear – stopping the vessel without, on the account given, sinking it or causing reported casualties.
- **A third vessel disabled:** The Vela Nova is the third vessel the US has disabled under the blockade, alongside the two previously disabled and two boarded; US Central Command has redirected more than 40 commercial vessels since the blockade was reimposed on 14 July.
- **A new level of enforcement:** The use of Hellfire missiles fired from a helicopter to disable a merchant ship marks a more overtly kinetic phase of blockade enforcement, signalling that the US intends to enforce the blockade robustly and will use force against vessels attempting to run it.
- **The blockade’s centrality:** The blockade remains one of the central issues of the war and of the stalled deal: Iran has demanded its lifting as a condition for reopening the Strait, while the US has said it will lift it only once a deal is implemented, on a performance basis – and, as this incident shows, is enforcing it in the meantime.

WS Assessment: The disabling of the Vela Nova demonstrates that the US is prepared to use force to enforce its blockade, and that the blockade is fully operational and being actively policed in the Gulf of Oman. While the action was directed at a blockade-runner rather than at Iran directly, it is an escalation of the kinetic tempo on the water and a reminder that the Gulf of Oman – the approach to the Strait – is an active enforcement zone. For shipping, the message is unambiguous: vessels attempting to reach Iranian ports face being disabled by force.

3. FIRST RED SEA DEATHS – A SAUDI VESSEL STRUCK IN THE BAB AL-MANDEB

- **The attack:** A Saudi-owned commercial vessel was reportedly struck by a missile while transiting the Bab al-Mandeb Strait in the Red Sea, according to shipping sources and Yemeni officials; the marine intelligence group Marisks said, based on initial reports, that three crew members were killed.
- **The first Red Sea deaths:** The strike marks the first reported deaths on commercial shipping in the Red Sea in this phase of the conflict – a significant and grim escalation of the Iranian-backed Houthi campaign, which had until now caused damage and disruption but not, in this phase, fatalities at sea.
- **Following the Mocha attacks:** The killing follows the Houthi attacks on the government-held Red Sea port of Mocha twice in 24 hours, and the claimed strike on a Saudi Aramco refinery – part of a sustained and widening Houthi campaign against Saudi and Red Sea targets during the pause in direct US-Iran strikes.
- **Initial reports – details to firm up:** As with any such incident, the initial reports may be revised as more information emerges; the flag, ownership and precise circumstances are still being confirmed, but the reported fatalities mark a clear escalation.
- **The Red Sea contested:** With the Bab al-Mandeb now the site of a fatal attack and the Strait of Hormuz effectively closed, both of the region's principal maritime chokepoints are active conflict zones, sustaining the disruption to global shipping and the diversion of traffic around Africa.

WS Assessment: The first fatal strike on Red Sea shipping is a serious escalation and a reminder that Iran's proxies are widening the war and raising its human cost even as the direct US-Iran conflict is paused. It sharpens the risk to seafarers and to Saudi-linked shipping in particular, and it increases the pressure for a Saudi or US response that could further widen the conflict. For maritime clients, the Red Sea must now be treated as a zone where attacks on commercial shipping are not only damaging but lethal.

4. THE DIPLOMATIC STALEMATE PERSISTS

- **No deal, bar raised:** The United States and Iran have yet to reach a deal to reopen the Strait of Hormuz, and both sides have raised the bar: Iran demands the lifting of the blockade, compensation and other concessions, while President Trump on Monday added a demand that Iran compensate victims' families and Middle Eastern countries for "past misdeeds."
- **"Open" claim contradicted:** President Trump has said the Strait is "open," claiming the US Navy has swept the waterway for mines and controls it; but shipping data does not back that up, CNN reported, with traffic through the Strait remaining minimal – a gap between the political claim and the operational reality.
- **"Semi-negotiating":** Trump has described the US as only "semi-negotiating" and signalled he would let economic pressure build on Iran, indicating Washington is content to wait rather than push for an early conclusion – a posture consistent with the deepening stalemate.
- **A functioning, entrenched Iranian leadership:** Supreme Leader Mojtaba Khamenei's reshaping of the military leadership through six senior appointments stands, indicating a leadership that is functioning and consolidating; he has still not appeared in public, and the hardline consolidation points to entrenchment rather than compromise.
- **The framework frozen:** The Iran-Oman framework, agreed in substance earlier this month, remains frozen at the approval and implementation stage, overtaken by the hardening of both sides' positions; there is no indication of an imminent breakthrough.

WS Assessment: The diplomatic picture is static: a framework agreed in principle but stalled, both sides hardened and waiting, and no channel producing movement. With the direct strike pause holding but the maritime conflict escalating, the war has entered a phase of frozen diplomacy and rising friction on the water – a configuration that could persist for some time, and that carries the risk of a maritime incident forcing the diplomacy or the direct conflict back into motion.

5. OIL, SHIPPING AND THE TWO CHOKEPOINTS

- **Both chokepoints active:** With the Strait of Hormuz effectively closed and the Bab al-Mandeb now the site of a fatal attack, the two principal maritime routes for regional and global energy trade are both active conflict zones, forcing continued diversion of traffic around Africa and sustaining the disruption to shipping.
- **The blockade enforced:** The US naval blockade of Iran's ports remains fully in force and is being actively enforced, as the disabling of the Vela Nova shows; the Strait remains closed to normal traffic, with only minimal crossings, and Iran insists no route other than its own will open.
- **Oil holds a risk premium:** Oil prices remain choppy, holding a risk premium as the war enters its sixth month; the intensifying maritime conflict, the fatal Red Sea strike and the continuing blockade all support the premium, offsetting the easing that accompanied last week's deal hopes.
- **Water infrastructure a demonstrated target:** The conflict has seen water infrastructure struck on multiple sides – US strikes damaged a desalination plant in Iran's Hormozgan province in July, after Iran struck a Kuwaiti water facility – underlining the vulnerability of the desalination capacity on which the Gulf states, including the UAE, depend.
- **UAE approaches:** There is no new confirmed strike on UAE territory or on shipping in UAE waters; both of the past day's incidents were off the UAE – in the Gulf of Oman and the Bab al-Mandeb – and the earlier attack on two UAE tankers remains the last confirmed UAE-linked loss. Vessels remain anchored off Khor Fakkan awaiting safe passage.

WS Assessment: The maritime picture is one of intensifying, now-lethal disruption across both chokepoints, with no early prospect of reopening. For UAE-linked operators, transit remains inadvisable across both the Strait and the Red Sea, and the demonstrated targeting of water infrastructure elsewhere reinforces the case for maintaining energy and water resilience given Iran's standing threat to Gulf infrastructure.

6. DUBAI AND THE UAE

Operational Picture

- **No new confirmed strike – both incidents were off the UAE.** There is no new confirmed strike on UAE territory; the US disabling of the Vela Nova occurred in the Gulf of Oman and the fatal Red Sea strike in the Bab al-Mandeb, neither on UAE soil, and the earlier attack on two UAE tankers stands. Iran's warning that any new US attack would trigger retaliation against Gulf energy infrastructure continues to apply to the UAE.
- **USE THE PAUSE – COMPLETE OUTSTANDING DEPARTURES.** With direct US-Iran strikes paused and airports open, complete any deferred non-essential departure on scheduled commercial flights. The maritime conflict is escalating beneath the pause; completing departures while the pause holds remains prudent.
- **Hold readiness – and maintain energy and water resilience.** Essential personnel should maintain shelter-in-place and evacuation readiness; the pause is tenuous, the maritime war is intensifying, and Iran's threat to Gulf energy and utility infrastructure stands. The UAE hosts US forces at Al Dhafra.
- **Utility and shelter measures should remain in place, with attention to water.** Keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption, and the demonstrated targeting of desalination facilities elsewhere makes water resilience a particular priority. Follow official UAE and NCEMA guidance and shelter promptly on any alert.
- **Shipping: transit inadvisable across both chokepoints.** The Strait remains closed and its approaches an active US enforcement zone, and the Red Sea has now seen a fatal attack on commercial shipping. Suspend all transits and hold vessels clear of both the Strait and the Bab al-Mandeb until safe passage is verified.

Return Guidance: **MAXIMUM** Held – Both Phases Suspended, Await a Signed Deal and Verified Safe Passage

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended. The diplomatic stalemate persists while the maritime war escalates and turns deadly, and nothing is signed; clients should use the pause to complete departures, hold readiness, and await a signed, implemented deal and verified safe passage before any change.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation is confirmed; a frozen stalemate with an escalating maritime war is not a settlement.
- **Non-essential personnel – COMPLETE DEPARTURES:** Use the pause and open airports to finish any deferred departures now, on scheduled commercial flights.
- **Essential personnel – hold readiness:** Maintain shelter-in-place and evacuation readiness, keep documentation and go-bags current, and monitor the maritime conflict, the diplomacy, the energy and water infrastructure threat, and any resumption of direct strikes.
- **Maritime/energy clients:** Suspend all transits across both the Strait and the Red Sea; note the active US blockade enforcement in the Gulf of Oman and the fatal Houthi strike in the Bab al-Mandeb, and review protective measures for energy, power and desalination assets.
- **De-escalation path (MAXIMUM → HIGH):** A signed and implemented deal, the reopening of the Strait with verified safe passage, the lifting of the blockade, and a de-escalation of the maritime conflict would allow the alert to come down. These conditions remain distant amid the stalemate; Westminster Security is ready to lower the alert to HIGH promptly once they are met.
- **Further escalation:** A resumption of direct US strikes, a major Iranian or proxy attack on Gulf or Red Sea shipping or energy infrastructure, a Saudi or US response to the Red Sea killing that widens the war, or a strike on UAE territory would deepen the emergency; Westminster Security will issue immediate updates.

- **Standing posture:** MAXIMUM – a frozen stalemate overlaying an intensifying, now-lethal maritime war; protect people first, complete departures, hold readiness, and await a signed deal and verified safe passage.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD – the stalemate persists but the maritime war is escalating and turning deadly.** The US disabled a cargo ship with Hellfire missiles enforcing the blockade in the Gulf of Oman, and the Houthi Red Sea campaign turned deadly, with a Saudi vessel struck in the Bab al-Mandeb killing three. The deal remains stalled, and the direct US-Iran strike pause holds.
- **TRANSIT INADVISABLE ACROSS BOTH CHOKEPOINTS.** The Strait's approaches are an active US enforcement zone, and the Red Sea has seen a fatal attack on commercial shipping. Suspend all transits across both the Strait and the Bab al-Mandeb until safe passage is verified.
- **USE THE PAUSE – COMPLETE DEPARTURES NOW.** With direct strikes paused and airports open, complete any deferred non-essential departure on scheduled flights, while the pause holds.
- **NOTE THE ENERGY AND WATER INFRASTRUCTURE THREAT.** Iran's threat to Gulf energy infrastructure stands, and the war has seen desalination facilities targeted. Review protective measures for energy, power and desalination assets.
- **HOLD READINESS.** The pause is tenuous and the maritime war is intensifying. Essential personnel should keep shelter and evacuation readiness current, with particular attention to energy and water resilience.
- **Monitor for:** (1) whether the maritime escalation draws a Saudi or US response that widens the war; (2) whether the direct US-Iran pause holds; (3) any Iranian or proxy strike on Gulf or Red Sea energy, water or shipping infrastructure; (4) the diplomacy and the Iranian leadership; (5) any strike on UAE territory.
- **A frozen stalemate, an escalating maritime war – emergency updates to follow.** Westminster Security will move quickly to lower the alert to HIGH once the deal is implemented, the Strait reopens with verified safe passage, and the blockade is lifted, and will issue immediate updates on any escalation or strike on Gulf energy or water infrastructure or UAE territory.
- **This is the one hundred and fifty-third edition.** Day 166 of the war.

8. KEY POINTS

- **THE US DISABLED A CARGO SHIP WITH HELLFIRE MISSILES, ENFORCING THE BLOCKADE.** US Central Command said it disabled the Panama-flagged M/V Vela Nova on Tuesday by firing two Hellfire missiles into its engine room from a US Navy helicopter, after the vessel attempted to transit the Gulf of Oman toward an Iranian port and ignored repeated warnings. It is the third vessel disabled under the blockade – a new, more kinetic level of enforcement.
- **THE HOUTHİ RED SEA CAMPAIGN TURNED DEADLY – FIRST RED SEA DEATHS.** A Saudi-owned commercial vessel was reportedly struck by a missile in the Bab al-Mandeb, killing three crew members, according to initial reports. It is the first reported death on commercial shipping in the Red Sea in this phase, following the Houthi attacks on Mocha and a Saudi Aramco refinery – a grim escalation of the widening proxy campaign.
- **THE DIPLOMATIC STALEMATE PERSISTS.** No deal has been reached and both sides have raised the bar: Iran demands the blockade lifted and compensation, while Trump has added a demand that Iran compensate victims and regional states. Trump's claim the Strait is "open" is contradicted by shipping data. The Iran-Oman framework remains frozen at the approval stage; the US is only "semi-negotiating."
- **THE DIRECT US-IRAN STRIKE PAUSE HOLDS – BUT THE FRICTION HAS MOVED TO THE WATER.** There have been no new direct US-Iran strikes, and the pause holds; but the maritime conflict is intensifying beneath it, with the US enforcing the blockade by force and the Houthis escalating in the Red Sea. Each incident carries the risk of a response that reignites the direct war. Iran's leadership, reshaped by six senior appointments, is functioning but entrenched.
- **BOTH CHOKEPOINTS ARE ACTIVE, LETHAL CONFLICT ZONES.** With the Strait effectively closed and its approaches an active US enforcement zone, and the Bab al-Mandeb now the site of a fatal attack, the region's two principal maritime routes are both active conflict zones. Oil holds a risk premium. The war has also seen desalination facilities targeted – relevant to the UAE's water resilience. Transit remains inadvisable across both.
- **MAXIMUM HELD – NO NEW CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND FIFTY-THIRD EDITION. DAY 166.** The maritime war is escalating, but both of the past day's incidents were off the UAE – in the Gulf of Oman and the Bab al-Mandeb – and the UAE remains a mediating party with no strike on its territory, within Iran's standing threat to Gulf energy and water infrastructure. Both phases remain suspended; use the pause to complete departures, hold readiness, and protect energy and water resilience. Westminster Security is ready to lower the alert to HIGH promptly once the deal is implemented and safe passage verified.

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THE STALEMATE PERSISTS BUT THE MARITIME WAR INTENSIFIES – THE US DISABLED THE CARGO SHIP M/V VELA NOVA WITH TWO HELLFIRE MISSILES IN THE GULF OF OMAN, ENFORCING THE BLOCKADE (A THIRD VESSEL DISABLED), AND THE HOUTHİ RED SEA CAMPAIGN TURNED DEADLY – A SAUDI-OWNED VESSEL STRUCK IN THE BAB AL-MANDEB REPORTEDLY KILLED THREE CREW.

THE DEAL REMAINS STALLED (BOTH SIDES HAVE RAISED THE BAR; TRUMP'S "OPEN" CLAIM IS CONTRADICTED BY SHIPPING DATA), AND THE DIRECT US-IRAN STRIKE PAUSE HOLDS. MAXIMUM ALERT HELD – BOTH PHASES SUSPENDED; USE THE PAUSE TO COMPLETE DEPARTURES AND HOLD READINESS. NO NEW CONFIRMED STRIKE ON UAE TERRITORY.

A FROZEN STALEMATE OVERLAYING AN INTENSIFYING, NOW-LETHAL MARITIME WAR – BOTH CHOKEPOINTS ARE ACTIVE CONFLICT ZONES; TRANSIT INADVISABLE; PROTECT ENERGY AND WATER RESILIENCE. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND FIFTY-THIRD EDITION. DAY 166.