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DAY 199 – THE DIPLOMATIC THREAD STALLS: THE IRAN-GULF HORMUZ TALKS IN OMAN (SCHEDULED FOR TODAY) ARE POSTPONED "IN THE INTERESTS OF CONSENSUS" – SAUDI ARABIA SUBMITTED AMENDMENTS OVER IRANIAN CONTROL AND FEES, AND BAHRAIN REFUSED TO ATTEND, REFLECTING A LACK OF GULF CONSENSUS; OIL SURGES PAST $107. THE RED SEA FRONT IS CONTESTED (YEMENI GOVERNMENT COUNTER-OFFENSIVE ON MOCHA) – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

14 September 2026 (0800 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE DIPLOMATIC THREAD THAT EMERGED OVER THE WEEKEND HAS STALLED, AND OIL HAS SURGED. The Iran-Gulf talks on the Strait of Hormuz – scheduled for today in Oman, and notable for excluding the United States – have been postponed "in the interests of consensus"; the postponement reflects a lack of Gulf consensus, with Saudi Arabia submitting amendments over concerns that the proposed framework could entrench Iranian control and fees over the Strait, and Bahrain refusing to attend any meeting with Iran. Oil has surged past $107 a barrel on the setback and the persisting comprehensive squeeze. On the Red Sea front, the Houthi advance is now being contested, with Yemeni government forces mounting a counter-offensive to retake the port of Mocha, though the Houthis retain their coastal gains and the mid-strait island. The Iran-UAE thaw reported over the weekend has not been contradicted, but the Oman talks – the most concrete diplomatic vehicle – have stalled. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. 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 transits.

⚠ **ASSESSMENT:** THE POSTPONEMENT IS A SETBACK – BUT ALSO A SIGN OF GULF RESOLVE. The postponement of the Oman talks is a setback to the diplomatic thread, but it should be read carefully. It reflects not a collapse of diplomacy but a lack of Gulf consensus on the terms: Saudi Arabia and the other Gulf states are unwilling to accept a framework that would entrench Iranian control of the Strait, or Iranian fees, as a new status quo, and Saudi Arabia's amendments and Bahrain's refusal to attend reflect a firm Gulf position rather than a failure of will. The delay is "in the interests of consensus," and Oman has stressed its continued commitment to dialogue; the diplomacy is delayed, not dead. But the gap between Iran and the Gulf is real – Iran seeks sanctions relief and the release of frozen assets even for a limited reopening, terms the Gulf and the US have rejected – and the talks' exclusion of the US underlines the difficulty of a durable settlement. Meanwhile oil has surged past $107, the comprehensive squeeze persists, and the military situation remains severe, even as the Red Sea front is now contested. For UAE clients, the posture remains MAXIMUM with high readiness; the Iran-UAE thaw is a positive the UAE should build on, but the broader diplomacy has stalled. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 199 – THE DIPLOMATIC THREAD STALLS; OIL SURGES PAST $107

The diplomatic thread that emerged over the weekend has stalled, oil has surged past $107 a barrel, and the military situation remains severe, even as the Red Sea front is now contested. The Iran-Gulf talks on the Strait of Hormuz – scheduled for today in Salalah, Oman, and notable for excluding the United States – have been postponed, the Omani foreign minister announcing late on Sunday that the meeting was delayed "in the interests of consensus." The postponement reflects a lack of Gulf consensus rather than a collapse of diplomacy: Saudi Arabia submitted amendments to the proposed Omani framework, concerned that its language could entrench Iranian control of the Strait and Iranian fees as a new status quo unacceptable to the Gulf states; Bahrain ruled out attending any meeting with Iran; and no regional state had confirmed its participation. Iran, for its part, had planned to unveil a plan for managing the Strait agreed with Oman, but has made clear this would not mean a full reopening, seeking sanctions relief and the release of frozen assets even for a limited one. Oil prices have surged, with Brent crude up more than 3% to nearly $108 a barrel, on the setback and the persisting comprehensive squeeze on the region's oil exports. On the Red Sea front, the Houthi advance is now being contested, with Yemeni government forces mounting a counter-offensive to retake the port of Mocha, though the Houthis retain their control of Yemen's Red Sea coast and the mid-strait island. The Iran-UAE thaw reported over the weekend has not been contradicted. There is no confirmed strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. 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 transits.

Where Things Stand

Element	Status (as of 0800 GMT Monday 14 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The diplomatic thread has stalled; oil surges. Complete departures; high readiness; suspend all transits.
Oman talks	**POSTPONED.** The Iran-Gulf Hormuz talks (today, Salalah, without the US) are postponed "in the interests of consensus." A setback, though a delay, not a collapse.
Why postponed	Saudi Arabia submitted amendments over Iranian control and fees; Bahrain refused to attend; no regional state confirmed participation. A lack of Gulf consensus.
Oil	**SURGES PAST $107.** Brent up more than 3% to nearly $108 on the setback and the comprehensive squeeze. Upward pressure intensifying.
Red Sea front	**CONTESTED.** Yemeni government forces mount a counter-offensive to retake Mocha; Houthis retain coastal gains and the mid-strait island.
Iran-UAE thaw	The weekend's Iran-UAE thaw (Pezeshkian-Abu Dhabi Crown Prince "constructive exchange") is not contradicted – a positive the UAE should build on.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE in the latest period. Airports open.

WS Assessment: The postponement of the Oman talks is a setback to the diplomatic thread, but it reflects a firm Gulf position against Iranian control of the Strait rather than a collapse of diplomacy; oil has surged past $107 on the setback and the persisting squeeze. The alert stays at MAXIMUM with high readiness. The Iran-UAE thaw remains a positive, but the broader diplomacy has stalled; clients should watch whether the talks are rescheduled.

2. THE OMAN TALKS POSTPONED – A LACK OF GULF CONSENSUS, NOT A COLLAPSE

- **The postponement:** The Iran-Gulf talks on the Strait of Hormuz, scheduled for today in Salalah, Oman, have been postponed; the Omani foreign minister announced late on Sunday that the regional meeting was delayed "in the interests of consensus," and "in order to create conditions conducive to a constructive dialogue," without setting a new date, and stressed Oman's continued commitment to dialogue.
- **Without the United States:** The talks were notable for excluding the United States: Gulf diplomats and Iranian officials were to discuss an Omani plan for reopening the Strait to regular tanker traffic, a conversation that would have proceeded without a critical player, reflecting Gulf frustration with the status quo and a desire to resolve the Strait issue among the regional parties.
- **Saudi Arabia's concerns:** The postponement reflects a lack of Gulf consensus on the terms: Saudi Arabia submitted amendments to the proposed framework, concerned that its language could effectively establish a new status quo – entrenching Iranian control of the Strait and the possibility of Iranian fees – that would not be acceptable to it or the other Gulf Cooperation Council states.
- **Bahrain's refusal; uncertain participation:** Bahrain ruled out attending any meeting involving Iran until diplomatic relations with Tehran are restored; Saudi Arabia's attendance was uncertain given the Houthi attacks it faces; and no regional state had confirmed its participation – underlining the difficulty of assembling a common Gulf position.
- **Iran's terms:** Iran had planned to unveil a plan for managing the Strait agreed with Oman, but has made clear it would not mean a full reopening: Tehran argues it can open the Strait, even on a limited basis, only if there are concessions such as the lifting of US sanctions and the release of its frozen overseas assets – terms the Gulf states and the US have rejected. The possibility of Iranian tolls is widely rejected, though voluntary contributions for directing passage are being considered.

WS Assessment: The postponement is a setback to the diplomatic thread, but it reflects a firm Gulf position – an unwillingness to accept Iranian control or fees as the new normal – rather than a collapse of the diplomacy, which is delayed rather than dead. The gap between Iran's terms and the Gulf's is real, and the exclusion of the US underlines the difficulty of a durable settlement; clients should watch whether the talks are rescheduled and whether the gap can be bridged.

3. OIL SURGES PAST $107; THE YEMEN FRONT CONTESTED; THE IRAN-UAE THAW

- **Oil surges past $107:** Oil prices have surged, with Brent crude up more than 3% to nearly $108 a barrel, on the postponement of the Oman talks and the persisting comprehensive squeeze on the region's oil exports; the Hormuz blockade continues to drive prices higher, and the setback to the talks has intensified the upward pressure, with concerns that prices will climb further.
- **The Yemen front contested:** On the Red Sea front, the Houthi advance is now being contested: Yemeni government forces, backed by the Saudi-led coalition, are mounting a counter-offensive to retake the port of Mocha, and fighting has intensified along the coast; the Houthis retain their control of Yemen's Red Sea coast and the mid-strait island for now, but their gains are no longer uncontested.
- **The comprehensive squeeze persists:** Despite the contested Yemen front, the comprehensive squeeze on Gulf oil exports persists: the Strait of Hormuz remains blockaded and interdicted, Saudi Arabia's East-West pipeline remains shut, and the Houthis retain their grip on the Bab el-Mandeb approaches – all major routes remain under threat, sustaining the pressure on oil prices.
- **The Iran-UAE thaw stands:** The Iran-UAE thaw reported over the weekend – the constructive exchange between Iran's president and the Crown Prince of Abu Dhabi, with both sides seeking to turn the page – has not been contradicted, and remains a positive for the UAE; it stands apart from the stalled Gulf-wide talks, and the UAE's bilateral channel with Tehran may prove more durable than the multilateral process.
- **The wider fronts:** Israel has continued its attacks on Gaza, southern Lebanon and southern Syria, and Israel and Lebanon are due to meet in Rome in October on a US-brokered security agreement; the wider regional fronts remain active, though the direct US-Iran tanker exchange has quietened.

WS Assessment: The oil surge past $107 reflects the market's reading of the stalled diplomacy and the persisting squeeze, and points to continued upward pressure; the contested Yemen front introduces uncertainty into the Red Sea picture. The Iran-UAE thaw remains a positive for the UAE, and its bilateral channel may prove more resilient than the stalled Gulf-wide talks; clients should watch both.

4. THE GULF TANKER WAR; THE UAE; THE REGIONAL PICTURE

- **The Gulf tanker war quieter:** In the Gulf, the tanker war remains at a lower intensity than its peak, with the direct US-Iran tanker exchange quietened and traffic far below normal; but the Strait remains blockaded and interdicted, Iran continues to require permission for passage, and vessels remain hesitant to cross.
- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack in the waters near the UAE in the latest period; the vessel incidents of recent days have not been repeated, and the quieter Gulf tanker war has kept the immediate maritime danger near the UAE reduced.
- **The UAE's energy picture:** The comprehensive squeeze and the oil surge past $107 keep the UAE's energy picture tight, though the UAE has not been struck; a rescheduling of the Oman talks and progress on the Iran-UAE thaw could begin to ease the pressure, but the stalled diplomacy points to continued tightness for now.
- **The UAE's diplomatic position:** The Iran-UAE thaw places the UAE in a favourable diplomatic position, with a bilateral channel to Tehran that stands apart from the stalled Gulf-wide talks; the UAE's pragmatic posture continues to serve it, and clients should watch whether the thaw develops even as the multilateral process is delayed.
- **US security posture:** US security alerts for the region remain in force, and the threat environment across the Gulf is heightened; the UAE hosts US forces at Al Dhafra, and the Gulf states hosting US forces remain exposed to Iranian retaliation should the diplomacy fail. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE has not been struck and the Gulf tanker war remains quieter, but the stalled diplomacy and the oil surge keep the danger and the energy pressure elevated. Clients should hold high readiness, protect energy and water resilience, watch the Iran-UAE thaw and any rescheduling of the Oman talks, and remain vigilant for any renewed escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **All major oil routes still under threat:** All of the region's major oil-export routes remain under threat: the Strait of Hormuz, blockaded and interdicted by Iran; the Bab el-Mandeb and the Red Sea, with the Houthis holding the coast and the mid-strait island though now contested; and the East-West pipeline, still shut – the comprehensive squeeze persists, and the stalled talks offer no near-term relief.
- **Oil surges past $107:** Brent crude has surged more than 3% to nearly $108 a barrel on the postponement of the Oman talks and the persisting squeeze; the setback to the diplomacy has intensified the upward pressure, and diesel remains at record highs, with concerns that prices will climb further if the squeeze is not eased.
- **The Gulf tanker war quieter:** The Gulf tanker war remains at a lower intensity, with the direct US-Iran exchange quietened and no major new attacks in the immediate period; but traffic remains far below normal, vessels remain hesitant, and the waters of the Strait and the Gulf of Oman remain a hostile zone.
- **The Red Sea front contested:** The Red Sea front is now contested, with Yemeni government forces mounting a counter-offensive to retake Mocha; the Houthis retain their gains for now, but the front is dynamic, and the outcome will bear on the security of the Bab el-Mandeb and Saudi Red Sea oil exports.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports, and no new attack near the UAE in the latest period; vessels remain anchored off the UAE's east coast at Khor Fakkan. UAE-linked operators should continue to treat the Strait, the Bab el-Mandeb and the waters near the UAE as hostile and suspend all transits.

WS Assessment: The maritime and energy picture remains one of a comprehensive squeeze with oil surging past $107, and the stalled talks offer no near-term relief; the contested Yemen front adds uncertainty. For UAE-linked operators, all transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **The diplomacy stalls and oil surges – but the Iran-UAE thaw stands, and no confirmed strike on UAE territory.** The Oman talks have been postponed and oil has surged past $107, but the Iran-UAE thaw stands and the Gulf tanker war remains quieter. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. The comprehensive squeeze keeps the UAE's energy picture tight.
- **COMPLETE DEPARTURES NOW – THE DIPLOMACY IS UNRESOLVED.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The diplomacy has stalled and the military situation is severe; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – THE DIPLOMACY HAS STALLED.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the Oman talks have been postponed and the escalation could resume. 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.
- **PROTECT ENERGY AND WATER RESILIENCE – OIL SURGES PAST $107.** All major Gulf oil routes remain threatened, oil has surged past $107, and diesel is at record highs. Protect energy resilience; keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption.
- **Shipping: SUSPEND ALL TRANSITS – THE STRAITS REMAIN HOSTILE.** The Strait of Hormuz, the Bab el-Mandeb and the waters near the UAE remain hostile, and traffic is far below normal. Suspend all transits, hold vessels clear of both straits and the waters near the UAE, and treat the region's waters as hostile until a durable de-escalation is confirmed.
- **Build on the Iran-UAE thaw; watch for a rescheduling of the Oman talks.** The Iran-UAE thaw remains a positive the UAE should build on, and its bilateral channel to Tehran may prove more durable than the stalled Gulf-wide talks; watch whether the Oman talks are rescheduled and whether the diplomacy regains momentum, while holding posture until a durable de-escalation is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – the Diplomacy Stalled, Oil Surging

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The Oman talks have been postponed and oil has surged past $107, though the Iran-UAE thaw stands and the Gulf tanker war remains quieter. Clients should complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the diplomacy.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation is confirmed; a stalled diplomacy and a surging oil price amid a severe military situation are not a settlement.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the open airports and the quieter period to finish any deferred departures without delay, on scheduled commercial flights; do not assume the lull will hold.
- **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 rescheduling of the Oman talks, the Iran-UAE thaw, any renewed escalation, and any strike toward UAE territory.
- **Business/compliance clients:** Review exposure given the US sanctions campaign, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A rescheduling and successful outcome of the Oman talks, progress on the Iran-UAE thaw, the lifting of the US blockade, a confirmed ceasefire, and a genuine reopening of the straits with verified safe passage would allow the

alert to come down. The talks' postponement has delayed this; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.

- **Further escalation – still possible:** A definitive collapse of the diplomacy, a strike on UAE territory, a disproportionate Iranian strike, a further move against Gulf oil infrastructure, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the diplomacy stalled but not dead, oil surging, the comprehensive squeeze persisting; protect people first, complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the Iran-UAE thaw and any rescheduling of the Oman talks.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the diplomatic thread stalls, oil surges.** The Iran-Gulf Hormuz talks in Oman (today, without the US) have been postponed "in the interests of consensus," reflecting a lack of Gulf consensus – Saudi Arabia submitted amendments over Iranian control and fees, and Bahrain refused to attend. Oil has surged past $107. The Red Sea front is contested (a Yemeni counter-offensive on Mocha). The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **READ THE POSTPONEMENT AS A SETBACK, NOT A COLLAPSE.** The delay reflects a firm Gulf position against Iranian control of the Strait, not a failure of will; the diplomacy is delayed, not dead. Watch whether the talks are rescheduled and whether the Iran-Gulf gap can be bridged.
- **BUILD ON THE IRAN-UAE THAW.** The Iran-UAE thaw stands apart from the stalled Gulf-wide talks and may prove more durable; it remains the most favourable diplomatic development for the UAE. Watch whether it develops.
- **PROTECT ENERGY AND WATER RESILIENCE – OIL SURGES PAST $107.** With all major Gulf oil routes threatened, oil past $107 and diesel at record highs, protect energy resilience. Keep water, fuel and generator contingencies ready.
- **COMPLETE DEPARTURES NOW; SUSPEND ALL TRANSITS.** Use the quieter period to complete deferred non-essential departures on scheduled flights, keep shelter readiness current, and suspend all transits across both straits and the waters near the UAE. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) any rescheduling of the Oman talks and the Iran-UAE thaw; (2) any strike on UAE territory, ports or infrastructure; (3) a definitive collapse of the diplomacy or a disproportionate Iranian strike; (4) the contested Yemen front and the Houthi position on Bab el-Mandeb; (5) an Iranian attack on Israel.
- **The diplomatic thread stalls – emergency updates to follow.** Westminster Security will issue immediate updates on any rescheduling or collapse of the Oman talks, any breakthrough in the Iran-UAE thaw, any strike on UAE territory, any renewed escalation, or any major development, and will lower the alert to HIGH only once a durable de-escalation is confirmed.
- **This is the one hundred and eighty-sixth edition.** Day 199 of the war.

8. KEY POINTS

- **THE DIPLOMATIC THREAD STALLS – THE OMAN TALKS POSTPONED.** The Iran-Gulf talks on the Strait of Hormuz, scheduled for today in Oman and notable for excluding the US, have been postponed "in the interests of consensus." It is a setback to the weekend's diplomatic momentum, though a delay rather than a collapse; the diplomacy is delayed, not dead.
- **A LACK OF GULF CONSENSUS – A FIRM GULF POSITION.** The postponement reflects a lack of Gulf consensus: Saudi Arabia submitted amendments over concerns the framework could entrench Iranian control and fees over the Strait, and Bahrain refused to attend any meeting with Iran. This is a firm Gulf position against accepting Iranian control as the new normal, not a failure of will; but the gap between Iran's terms – sanctions relief, frozen-asset release – and the Gulf's is real.
- **OIL SURGES PAST $107.** Brent crude has surged more than 3% to nearly $108 a barrel on the postponement of the talks and the persisting comprehensive squeeze on Gulf oil exports; diesel remains at record highs. The setback has intensified the upward pressure, with concerns that prices will climb further if the squeeze is not eased. All major Gulf oil routes remain under threat.
- **THE RED SEA FRONT IS CONTESTED; THE IRAN-UAE THAW STANDS.** On the Red Sea front, Yemeni government forces are mounting a counter-offensive to retake Mocha, contesting the Houthi advance, though the Houthis retain their gains for now. The Iran-UAE thaw reported over the weekend has not been contradicted and remains a positive for the UAE; its bilateral channel to Tehran may prove more durable than the stalled Gulf-wide talks.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE GULF TANKER WAR QUIETER.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period; the Gulf tanker war remains at a lower intensity. The comprehensive squeeze and the oil surge keep the UAE's energy picture tight, but the UAE has not been struck and its diplomatic position is favourable. Hold high readiness and protect energy resilience.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND EIGHTY-SIXTH EDITION. DAY 199.** The diplomatic thread has stalled with the postponement of the Oman talks, and oil has surged past $107 – but the Iran-UAE thaw stands and no UAE territory has been struck. Both phases remain suspended; complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the Iran-UAE thaw and any rescheduling of the Oman talks. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 14th September 2026 – Information current as of 08:00 GMT

THE DIPLOMATIC THREAD THAT EMERGED OVER THE WEEKEND HAS STALLED. THE IRAN-GULF TALKS ON THE STRAIT OF HORMUZ – SCHEDULED FOR TODAY IN OMAN, AND NOTABLE FOR EXCLUDING THE US – HAVE BEEN POSTPONED "IN THE INTERESTS OF CONSENSUS," REFLECTING A LACK OF GULF CONSENSUS: SAUDI ARABIA SUBMITTED AMENDMENTS OVER CONCERNS THE FRAMEWORK COULD ENTRENCH IRANIAN CONTROL AND FEES OVER THE STRAIT, AND BAHRAIN REFUSED TO ATTEND. OIL HAS SURGED PAST $107.

THE POSTPONEMENT IS A SETBACK – BUT A FIRM GULF POSITION AGAINST IRANIAN CONTROL, NOT A COLLAPSE; THE DIPLOMACY IS DELAYED, NOT DEAD. THE RED SEA FRONT IS CONTESTED (A YEMENI GOVERNMENT COUNTER-OFFENSIVE ON MOCHA), AND THE IRAN-UAE THAW STANDS. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE IN THE LATEST PERIOD; THE GULF TANKER WAR REMAINS QUIETER. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

BUILD ON THE IRAN-UAE THAW; WATCH FOR A RESCHEDULING OF THE OMAN TALKS AND ANY RENEWED ESCALATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-SIXTH EDITION. DAY 199.