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DAY 202 – THE DIPLOMATIC CLIMATE WARMS: PRESIDENT TRUMP SAYS THE WAR IS NEARING ITS END AND COULD FINISH "AROUND THE MIDTERMS," THE HOUTHIS PLEDGE (IN OMAN) NOT TO ATTACK US, ISRAELI OR OTHER COMMERCIAL VESSELS – ONLY SAUDI ONES – AND IRAN RESTATES THE STRAIT WILL REOPEN IF THE US LIFTS ITS BLOCKADE. BUT THE STRAIT IS STILL SHUT (THREE TRANSITS WEDNESDAY), AND TRUMP'S OPTIMISM IS UNRELIABLE. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

17 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE DIPLOMATIC CLIMATE HAS WARMED, AND THE EASING OF RECENT DAYS HAS CONTINUED, BUT THE CORE BLOCKADE OF THE STRAIT OF HORMUZ PERSISTS AND THE ALERT REMAINS AT MAXIMUM. President Trump has said he hopes the war is nearing its end, that Iran is "very much wanting to make a deal," and that the war could end around the US midterms; the Houthis have told US officials in Oman that they will not attack American vessels and will not target Israeli or other commercial ships, only Saudi ones; and Iran's president has restated that the Strait will reopen once the US lifts its blockade. But the Strait itself remains effectively shut, with only three vessels transiting on Wednesday, and the core blockade persists; an Iranian vessel was struck near Qeshm Island. The Iran-UAE thaw stands. 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 Strait transits.

✓ **EASING SIGNALS:** THE DIPLOMATIC CLIMATE WARMS – A POSSIBLE PATH TO THE WAR'S END. The diplomatic climate has warmed markedly, and the pieces of a possible de-escalation are becoming clearer. President Trump has expressed optimism that the war is nearing its end, that Iran wants a deal, and that the conflict could end around the US midterms in November; the Houthis have pledged, in talks with US officials in Oman, not to attack American, Israeli or other commercial vessels, narrowing their campaign to Saudi ships alone; and Iran's president has restated the condition for reopening the Strait – the lifting of the US blockade – with Iran and Oman poised to sign an agreement on a shared route. Together with the easing of recent days – the Saudi pipeline resuming, the Houthis pushed back from the Bab el-Mandeb – and the standing Iran-UAE thaw, these signs point to a possible path toward the war's end. The Houthi pledge is of direct benefit to the UAE, whose commercial shipping is not a Houthi target. But the warming is in signals and conditions, not yet in facts on the water.

⚠ **ASSESSMENT:** THE SIGNALS ARE WARMING, BUT THE STRAIT IS STILL SHUT – AND TRUMP'S OPTIMISM IS UNRELIABLE. The warming is genuine and the most hopeful the picture has been in weeks, but two cautions are essential, and the alert stays at MAXIMUM. First, the warming is in signals and conditions, not facts: the Strait remains effectively shut, with only three vessels transiting on Wednesday, the core US blockade persists, and no agreement has been reached or reopening achieved; the gap between Iran's terms – the lifting of the blockade, sanctions relief, frozen assets – and the US and Gulf positions remains real. Second, President Trump's optimism has repeatedly proved unreliable in this war: he has swung between predicting imminent deals and threatening to bomb Iran and Oman, and his signals are a poor guide to outcomes. The rogue-hardliner risk also persists, capable of reversing the warming. For the UAE, the warming is encouraging – and the Houthi pledge and the Iran-UAE thaw are direct positives – but the core blockade and the risks keep the posture at MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 202 – THE DIPLOMATIC CLIMATE WARMS; THE STRAIT STAYS SHUT

The diplomatic climate has warmed markedly, and the easing of recent days has continued, but the core blockade of the Strait of Hormuz persists and the alert remains at MAXIMUM. President Trump has said he hopes the war with Iran is nearing its end, that Tehran is very much wanting to make a deal, and that the conflict could end around the US midterm elections in November, signalling a possible diplomatic opening after nearly seven months of war. The Houthis, in talks with US officials in Oman, have said they have no intention of attacking American vessels and remain committed to their 2025 ceasefire with Washington, and have pledged not to target Israeli or other commercial ships, narrowing their campaign to Saudi vessels alone – a pledge of direct benefit to the UAE and other Gulf commercial shipping. And Iran's president has restated that the Strait will reopen once the US lifts its naval blockade, with Iran and Oman poised to sign an agreement on a shared route. But the warming is in signals and conditions, not yet in facts: the Strait itself remains effectively shut, with only three vessels transiting on Wednesday, down from twelve the day before and well below the recent average, and the core US blockade persists; an Iranian vessel was struck near Qeshm Island. The Iran-UAE thaw reported over the weekend stands. 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 Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Thursday 17 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The climate warms, but the core blockade persists. Complete departures; high readiness; suspend all Strait transits.
Trump signal	**WAR "NEARING ITS END."** Trump says Iran is "very much wanting to make a deal" and the war could end "around the midterms" – but his signals are unreliable.
Houthi pledge	**ONLY SAUDI VESSELS.** Houthis tell US (in Oman) they will not attack US, Israeli or other commercial ships – only Saudi ones. A direct positive for UAE shipping.
Iran's condition	Pezeshkian restates the Strait will reopen if the US lifts its blockade; Iran and Oman poised to sign a shared-route agreement. The path is clearer.
Strait of Hormuz	**STILL SHUT.** Only three vessels transited Wednesday (down from 12). The core US blockade persists; an Iranian vessel was struck near Qeshm.
Easing continues	The Saudi pipeline is resuming and the Houthis have been pushed back from the Bab el-Mandeb; the easing of recent days continues.

UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE. The Iran-UAE thaw stands. Airports open.

WS Assessment: The diplomatic climate has warmed markedly – Trump's optimism, the Houthi pledge, Iran's restated reopening condition – and, with the easing of recent days and the Iran-UAE thaw, the pieces of a possible de-escalation are becoming clearer. But the warming is in signals and conditions, not facts: the Strait is still shut, the core blockade persists, Trump's optimism is unreliable, and the rogue-hardliner risk stands. The alert stays at MAXIMUM with high readiness; clients should watch closely without yet reading the warming as a settlement.

2. THE DIPLOMATIC CLIMATE WARMS – TRUMP OPTIMISM, THE HOUTHI PLEDGE, THE PATH TO REOPENING

- **Trump's optimism:** President Trump has said he hopes the war with Iran is nearing its end, that Tehran is very much wanting to make a deal, and that the conflict could end around the US midterm elections in November; the remarks signal a possible diplomatic opening after nearly seven months of war, and a shift in tone from his recent threats to strike Iran and Oman.
- **The Houthi pledge:** The Houthis, in talks with US officials in Oman, have said they have no intention of attacking American vessels and remain committed to their 2025 ceasefire with Washington, and have pledged not to target Israeli or other commercial ships, narrowing their campaign to Saudi vessels alone; this represents a significant narrowing of the Red Sea threat, though the Houthis continue to target Saudi shipping.
- **A direct benefit to the UAE:** The Houthi pledge is of direct benefit to the UAE and other Gulf commercial shipping: with the Houthis committing not to target non-Saudi commercial vessels, UAE-linked commercial shipping in the Red Sea and the Bab el-Mandeb is, by the Houthis' own statement, not a target, reducing the risk to the UAE's trade through the southern route.
- **Iran's reopening condition:** Iran's president has restated that the Strait of Hormuz will reopen once the United States lifts its naval blockade, with Iran and Oman poised to sign an agreement on a shared route for shipping; the condition – the lifting of the blockade – is clear, and the mechanism, the Iran-Oman corridor, is largely agreed, making the shape of a possible reopening clearer than before.
- **The pieces of a deal:** Together with the easing of recent days – the Saudi pipeline resuming, the Houthis pushed back from the Bab el-Mandeb – and the standing Iran-UAE thaw, the warming signals and the clearer conditions point to a possible path toward the war's end: a US lifting of the blockade, an Iran-Oman corridor reopening the Strait, and a broader de-escalation. The pieces are becoming visible, even if not yet assembled.

WS Assessment: The warming of the diplomatic climate – Trump's optimism, the Houthi pledge, Iran's restated condition – is the most hopeful development in weeks, and the pieces of a possible de-escalation are becoming clearer. The Houthi pledge is a direct positive for the UAE. But these are signals and conditions, not facts, and clients should watch whether they translate into a reopening and a de-escalation.

3. BUT THE STRAIT STAYS SHUT – THREE TRANSITS, THE CORE BLOCKADE PERSISTS

- **The Strait still shut:** The Strait of Hormuz remains effectively shut: only three commodity vessels transited on Wednesday, down from twelve the day before and well below the recent ten-day average of about seventeen, according to ship-tracking data; the warming in signals has not translated into a reopening, and the core US blockade and Iranian interdiction persist.
- **The blockade persists:** The core US naval blockade of Iran remains in force, and Iran continues to require permission for passage through the Strait; the reopening that Iran's president has conditioned on the lifting of the blockade has not occurred, because the blockade has not been lifted, and the gap between the parties' positions remains to be bridged.
- **A vessel struck near Qeshm:** An Iranian vessel was struck near Qeshm Island, on the Iranian side of the Strait, underlining that the waters of the Strait remain hostile despite the warming in the diplomatic climate; the incident, on the Iranian side rather than near the UAE, does not affect UAE territory, but confirms the Strait is not yet safe.
- **Trump's unreliability:** President Trump's optimism should be treated with caution: over the course of this war he has repeatedly swung between predicting imminent deals and threatening to bomb Iran and Oman, and his statements have proved a poor guide to outcomes; his current optimism is encouraging but not a reliable indicator that the war is ending.
- **The rogue-hardliner risk persists:** The rogue-hardliner risk identified over the weekend – the report that the July attacks that collapsed the June ceasefire were carried out by hardliners without the leadership's authorization – persists, and remains a wildcard capable of reversing the warming and triggering a renewed escalation, as it did in July; the warming does not eliminate this risk.

WS Assessment: The core blockade of the Strait persists, the Strait remains effectively shut, and the warming is in signals rather than facts; Trump's optimism is unreliable and the rogue-hardliner risk stands. The alert stays at MAXIMUM with high readiness, and clients should not read the warming as a de-escalation until the Strait reopens and a durable settlement is confirmed.

4. THE UAE; THE IRAN-UAE THAW; THE REGIONAL PICTURE

- **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 struck over the weekend was near an Iranian island, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The Houthi pledge benefits the UAE:** The Houthi pledge not to target non-Saudi commercial vessels is a direct benefit to the UAE, whose commercial shipping in the Red Sea and the Bab el-Mandeb is, by the Houthis' own statement, not a target; this reduces the risk to the UAE's trade through the southern route, complementing the UAE's ability to export oil through Fujairah.
- **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 – stands, and remains the most favourable diplomatic development for the UAE; conducted with Pezeshkian's leadership, it aligns with the warming diplomatic climate and places the UAE in a favourable position.
- **The UAE's favourable position:** The combination of the Houthi pledge, the Iran-UAE thaw, the Fujairah export route, and the warming diplomatic climate places the UAE in a relatively favourable position; but the core blockade of the Strait, the rogue-hardliner risk, and the unproven nature of the warming keep the danger elevated, and readiness must be maintained.
- **US security posture:** US security alerts for the region remain in force, and the threat environment across the Gulf remains heightened; the UAE hosts US forces at Al Dhafra, and the Gulf states hosting US forces remain exposed to Iranian retaliation, including a rogue hardliner attack, should the warming fail. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE is in a relatively favourable position – not struck, its shipping spared by the Houthi pledge, its thaw with Iran a positive, its Fujairah exports insulating it – and the warming diplomatic climate is encouraging. But the core blockade and the risks keep the danger elevated. Clients should hold high readiness, protect energy and water resilience, build on the thaw, and watch whether the warming translates into a de-escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait still shut, the easing continuing:** The Strait of Hormuz remains effectively shut, with only three vessels transiting on Wednesday, but the easing of recent days continues – the Saudi pipeline resuming, the Houthis pushed back from the Bab el-Mandeb, and the Houthi pledge narrowing the Red Sea threat; the maritime picture is easing at the margins but the core route remains closed.
- **Oil:** Oil remains elevated near recent highs, with the continued closure of the Strait keeping prices up; a reopening of the Strait would ease prices materially, and the warming in the diplomatic climate has raised the prospect of such a reopening, though it has not yet occurred and prices remain high.
- **The Red Sea threat narrows:** The Red Sea threat has narrowed with the Houthi pledge not to target non-Saudi commercial vessels and the Saudi air campaign pushing the Houthis back from the Bab el-Mandeb; the threat to Saudi shipping persists, but the threat to other commercial shipping, including UAE-linked vessels, has, by the Houthis' statement, eased.
- **A vessel struck near Qeshm:** An Iranian vessel was struck near Qeshm Island on the Iranian side of the Strait; the waters of the Strait remain hostile, and clients should not assume safe passage despite the warming, until a reopening with verified safe passage is in place.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports, and no new attack near the UAE; vessels remain anchored off the UAE's east coast at Khor Fakkan, and the UAE's Fujairah ports continue to export oil bypassing the Strait. UAE-linked operators should continue to suspend all Strait transits pending a confirmed reopening.

WS Assessment: The maritime and energy picture is easing – the Red Sea threat narrowing, the diplomatic climate warming – but the Strait remains shut and oil elevated. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **The climate warms and the UAE's position is favourable – but the Strait stays shut, and no confirmed strike on UAE territory.** The diplomatic climate has warmed, the Houthi pledge spares UAE shipping, and the Iran-UAE thaw stands; but the Strait remains shut and the core blockade persists. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The UAE is in a relatively favourable position, but readiness must be maintained.
- **COMPLETE DEPARTURES NOW – THE WARMING IS UNPROVEN.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The warming is in signals rather than facts, the core blockade persists, and a reversal remains possible; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A REVERSAL REMAINS POSSIBLE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the warming does not eliminate the core blockade, the rogue-hardliner risk, or the possibility of a reversal. 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.** The Strait remains shut and oil elevated, though the warming may begin to ease the pressure if it translates into a reopening. Protect energy resilience; keep water, fuel and generator contingencies ready; the UAE's Fujairah exports provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT REMAINS SHUT.** Despite the warming and the Houthi pledge, the Strait of Hormuz remains effectively shut, at three transits on Wednesday, and a vessel was struck near Qeshm. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat the Strait as shut until a confirmed reopening with verified safe passage is in place.
- **Build on the Houthi pledge and the Iran-UAE thaw; watch whether the warming translates into a reopening.** The Houthi pledge and the Iran-UAE thaw are direct positives for the UAE, and the warming diplomatic climate is encouraging; watch whether the warming translates into a reopening of the Strait and a de-escalation, while holding posture until one is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – the Climate Warming, the Strait Still Shut

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The diplomatic climate has warmed – Trump's optimism, the Houthi pledge, Iran's restated reopening condition – and the easing continues; but the Strait remains shut, the core blockade persists, and the warming is unproven. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the warming translates into a reopening.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a warming in signals amid a persisting core blockade is 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 warming 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 whether the warming translates into a reopening, any rescheduling of the Oman talks, the Iran-UAE thaw, a rogue hardliner escalation or reversal, 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 translation of the warming into a reopening of the Strait, the lifting of the US blockade, an Iran-Oman corridor with verified safe passage, a confirmed ceasefire, and a durable de-escalation would allow the alert to come down. The warming is the most promising development in weeks; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation and a confirmed reopening are in place.
- **Further escalation – still possible:** A reversal of the warming, a rogue hardliner attack, a collapse of the diplomacy, a strike on UAE territory, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the climate warming but the Strait still shut, the warming unproven, the rogue-hardliner risk standing, but the Houthi pledge and the Iran-UAE thaw favourable; protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the warming translates into a reopening.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the climate warms, the Strait stays shut.** Trump says the war is nearing its end and could finish around the midterms; the Houthis pledge (in Oman) not to attack US, Israeli or other commercial vessels, only Saudi ones; and Iran restates the Strait will reopen if the US lifts its blockade. But the Strait is still shut (three transits Wednesday), the core blockade persists, and Trump's optimism is unreliable. The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **WELCOME THE WARMING – BUT DO NOT YET READ IT AS DE-ESCALATION.** The warming – Trump's optimism, the Houthi pledge, Iran's restated condition – is the most hopeful development in weeks, but it is in signals rather than facts; the Strait is still shut, and Trump's optimism is unreliable. Await a confirmed reopening and a durable de-escalation.
- **BUILD ON THE HOUTHI PLEDGE AND THE IRAN-UAE THAW.** The Houthi pledge not to target non-Saudi commercial vessels spares UAE shipping, and the Iran-UAE thaw remains the most favourable thread for the UAE. Both are direct positives; build on them while holding posture.
- **GUARD AGAINST A REVERSAL; TREAT TRUMP'S OPTIMISM WITH CAUTION.** The rogue-hardliner risk persists and could reverse the warming, and Trump's optimism has proved unreliable. Guard against a reversal, and treat the warming signals with appropriate caution.
- **COMPLETE DEPARTURES NOW; SUSPEND ALL STRAIT TRANSITS.** Use the quieter period to complete deferred non-essential departures on scheduled flights, keep shelter readiness current, and suspend all transits through the Strait pending a confirmed reopening. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) whether the warming translates into a reopening of the Strait and a de-escalation; (2) any rescheduling of the Oman talks and the Iran-UAE thaw; (3) a rogue hardliner escalation or reversal; (4) any strike on UAE territory; (5) an Iranian attack on Israel.
- **The climate warms – emergency updates to follow.** Westminster Security will issue immediate updates on any reopening of the Strait, any breakthrough or collapse in the diplomacy, any rogue hardliner escalation, any strike on UAE territory, 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 one hundred and eighty-ninth edition.** Day 202 of the war.

8. KEY POINTS

- **THE DIPLOMATIC CLIMATE WARMS – A POSSIBLE PATH TO THE WAR'S END.** President Trump says the war is nearing its end, that Iran is "very much wanting to make a deal," and that it could finish around the US midterms; the Houthis pledge (in Oman) not to attack US, Israeli or other commercial vessels, only Saudi ones; and Iran restates the Strait will reopen if the US lifts its blockade, with an Iran-Oman corridor agreement poised. The pieces of a possible de-escalation are becoming clearer.
- **THE HOUTHI PLEDGE BENEFITS THE UAE.** The Houthi pledge not to target non-Saudi commercial vessels is a direct benefit to the UAE, whose commercial shipping in the Red Sea and the Bab el-Mandeb is, by the Houthis' own statement, not a target; this reduces the risk to the UAE's trade through the southern route, complementing its Fujairah export route and the Iran-UAE thaw. The UAE is in a relatively favourable position.
- **BUT THE STRAIT STAYS SHUT – THE WARMING IS IN SIGNALS, NOT FACTS.** The Strait of Hormuz remains effectively shut, with only three vessels transiting on Wednesday (down from 12); the core US blockade persists, and an Iranian vessel was struck near Qeshm. The warming is in signals and conditions, not facts, and no reopening or agreement has been achieved. Trump's optimism has repeatedly proved unreliable; treat it with caution.
- **THE ROGUE-HARDLINER RISK PERSISTS.** The rogue-hardliner risk – the report that the July attacks that collapsed the June ceasefire were unauthorised by Iran's leadership – persists, and remains a wildcard capable of reversing the warming and triggering a renewed escalation, as it did in July. The warming does not eliminate this risk; guard against a reversal.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE UAE'S POSITION FAVOURABLE.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Houthi pledge, the Iran-UAE thaw, the Fujairah export route, and the warming climate place the UAE in a relatively favourable position, though the core blockade and the risks keep the danger elevated. Hold high readiness and protect energy resilience.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND EIGHTY-NINTH EDITION. DAY 202.** The diplomatic climate has warmed – a possible path to the war's end – but the Strait remains shut, the core blockade persists, the warming is unproven, and Trump's optimism is unreliable. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the warming translates into a reopening. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 17th September 2026 – Information current as of 09:00 GMT

THE DIPLOMATIC CLIMATE HAS WARMED MARKEDLY. PRESIDENT TRUMP SAYS THE WAR IS NEARING ITS END, THAT IRAN IS "VERY MUCH WANTING TO MAKE A DEAL," AND THAT IT COULD FINISH "AROUND THE MIDTERMS"; THE HOUTHIS HAVE PLEDGED (IN OMAN) NOT TO ATTACK US, ISRAELI OR OTHER COMMERCIAL VESSELS – ONLY SAUDI ONES, A DIRECT BENEFIT TO UAE SHIPPING; AND IRAN HAS RESTATED THE STRAIT WILL REOPEN IF THE US LIFTS ITS BLOCKADE. THE PIECES OF A POSSIBLE DE-ESCALATION ARE BECOMING CLEARER.

BUT THE WARMING IS IN SIGNALS AND CONDITIONS, NOT FACTS: THE STRAIT REMAINS EFFECTIVELY SHUT (ONLY THREE VESSELS TRANSITED WEDNESDAY), THE CORE US BLOCKADE PERSISTS, AN IRANIAN VESSEL WAS STRUCK NEAR QESHM, AND TRUMP'S OPTIMISM HAS REPEATEDLY PROVED UNRELIABLE; THE ROGUE-HARDLINER RISK ALSO STANDS. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE; THE IRAN-UAE THAW STANDS AND THE UAE'S POSITION IS FAVOURABLE. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH

READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WELCOME THE WARMING BUT DO NOT YET READ IT AS DE-ESCALATION; WATCH WHETHER IT TRANSLATES INTO A REOPENING OF THE STRAIT, BUILD ON THE HOUTHI PLEDGE AND THE IRAN-UAE THAW, AND GUARD AGAINST A REVERSAL. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-NINTH EDITION. DAY 202.