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UAE SITREP DOCUMENT

DAY 203 – THE WARMING TURNS AMBIVALENT: PRESIDENT TRUMP SWINGS FROM OPTIMISM TO WEIGHING A "BIG DECISION" ON WHETHER TO "ANNIHILATE" IRAN ("ANYTHING COULD HAPPEN"), SAYING IRAN IS "NOT READY" FOR A DEAL AND THE US "CONTROLS" THE STRAIT – EVEN AS OIL EASES TO ~$104 (SAUDI OIL REROUTED VIA OMAN'S SOHAR PORT) AND SAUDI ARABIA PROPOSES A TWO-WEEK TRUCE WITH THE HOUTHIS. THE STRAIT STAYS SHUT (FOUR TRANSITS). THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE DIPLOMATIC WARMING OF RECENT DAYS HAS TURNED AMBIVALENT, WITH PRESIDENT TRUMP SWINGING FROM OPTIMISM TO WEIGHING A MAJOR ESCALATION, EVEN AS SOME EASING THREADS CONTINUE; THE STRAIT REMAINS SHUT AND THE ALERT REMAINS AT MAXIMUM. President Trump, who a day earlier said the war was nearing its end, has told Axios he faces a "big decision" on whether to "annihilate" his Iranian foes, that "anything could happen," and that Iran wants a deal but is "not ready," while claiming the US "controls" the Strait of Hormuz. But some easing threads continue: oil has eased to around $104 a barrel after Saudi Arabia rerouted oil through Oman's Sohar port, and Saudi Arabia has proposed a two-week truce with the Houthis, to be followed by direct talks, through Omani mediators. The Strait itself remains effectively shut, with only four vessels transiting on Thursday, and the IRGC struck a Togo-flagged tanker attempting passage. The Iran-UAE thaw and the Houthi pledge not to target non-Saudi commercial vessels stand. 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.

⚖ **MIXED SIGNALS:** THE SIGNALS ARE GENUINELY MIXED – EASING THREADS AGAINST A HARDER TRUMP TONE. The day's signals point in both directions, and the picture is ambivalent. On the easing side: oil has fallen to around $104 a barrel, from recent highs above $107, after Saudi Arabia arranged additional shipments through Oman's Sohar port via ship-to-ship transfers, easing fears of a prolonged supply gap; Saudi Arabia has proposed a two-week truce with the Houthis, to be followed by direct Saudi-Houthi talks through Omani mediators, offering a possible de-escalation on the Yemen front; and the Houthi pledge not to target non-Saudi commercial vessels, and the Iran-UAE thaw, stand. On the harder side: President Trump has swung from predicting the war's end to weighing whether to "annihilate" Iran, saying Iran is "not ready" for a deal and the US "controls" the Strait; his claim of direct talks with Iran is unconfirmed by Tehran, which has rejected talks unless its conditions are met; and the Strait remains shut, with the IRGC striking another tanker. The net picture is one of genuine ambivalence, vindicating the caution that Trump's signals are an unreliable guide.

⚠ **ASSESSMENT:** TRUMP'S SWING VINDICATES THE CAUTION – THE ALERT STAYS AT MAXIMUM. President Trump's swing, within a single day, from predicting the war's end to weighing whether to "annihilate" Iran is a textbook illustration of why his signals cannot be relied upon as a guide to outcomes, and why the alert has stayed at MAXIMUM throughout the warming. The underlying reality is unchanged: the Strait remains effectively shut, the core US blockade persists, Iran and the US remain apart on terms – Iran demanding the lifting of the blockade and the end of the war, the US non-committal – and no reopening or agreement has been reached. The genuine easing threads – the fall in oil, the Saudi rerouting via Sohar, the proposed Saudi-Houthi truce – are real and encouraging, and the Iran-UAE thaw and the Houthi pledge remain favourable for the UAE. But they are set against a harder Trump tone and a persistent core blockade, and the rogue-hardliner risk stands. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 203 – THE WARMING TURNS AMBIVALENT

The diplomatic warming of recent days has turned ambivalent, with President Trump swinging within a single day from predicting the war's end to weighing a major escalation, even as some genuine easing threads continue; the Strait remains effectively shut and the alert remains at MAXIMUM. President Trump, who on Wednesday said the war with Iran was hopefully nearing its end, has since told Axios that he faces a big decision on whether to annihilate his Iranian foes, that anything could happen, and told Fox News that Iran wants a deal but is not ready, that the US controls the Strait of Hormuz, and that he thinks the US will end up winning. His claim of direct talks with Iran is unconfirmed by Tehran, which has rejected talks unless its conditions – the lifting of the US blockade and the end of the war – are met. Against this harder tone, some easing threads continue: oil has eased to around $104 a barrel, from recent highs above $107, after Saudi Arabia arranged additional shipments through Oman's Sohar port via ship-to-ship transfers; and Saudi Arabia has proposed a two-week truce with the Houthis, to be followed by direct Saudi-Houthi talks, through Omani mediators. But the Strait itself remains effectively shut, with only four vessels transiting on Thursday, and the IRGC struck a Togo-flagged tanker attempting passage; Iran continues to assert that no vessel may pass without its permission. The Iran-UAE thaw and the Houthi pledge not to target non-Saudi commercial vessels stand. 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 Friday 18 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The warming turns ambivalent; the Strait stays shut. Complete departures; high readiness; suspend all Strait transits.
Trump tone	**HARDENS – WEIGHS "ANNIHILATION."** Trump now weighs a "big decision" on whether to "annihilate" Iran ("anything could happen"); says Iran "not ready" for a deal. A swing from optimism.
Oil	**EASES TO ~$104.** Brent fell 1.5% to $104.28 after Saudi Arabia rerouted oil via Oman's Sohar port (ship-to-ship transfers), easing supply-gap fears.
Saudi-Houthi truce	**PROPOSED.** Saudi Arabia has proposed a two-week truce with the Houthis, then direct talks, via Omani mediators – a possible Yemen-front de-escalation.
Strait of Hormuz	**STILL SHUT.** Only four vessels transited Thursday. The IRGC struck a Togo-flagged tanker attempting passage; Iran asserts control.
Direct talks	Trump claims direct talks with Iran; unconfirmed by Tehran, which has rejected talks unless its conditions are met. Treat with caution.

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

WS Assessment: The signals are genuinely mixed – easing threads (oil down, the Saudi rerouting via Sohar, the proposed Saudi-Houthi truce) against a harder Trump tone (weighing “annihilation”) and a persistent core blockade. Trump’s swing within a day vindicates the caution that his signals are unreliable. The alert stays at MAXIMUM with high readiness; clients should weigh the easing threads without relying on Trump’s tone, and watch whether the underlying reality – the shut Strait – changes.

2. TRUMP SWINGS FROM OPTIMISM TO WEIGHING "ANNIHILATION" – THE UNRELIABILITY CONFIRMED

- **The swing:** President Trump, who on Wednesday evening said the war was hopefully nearing its end and that Iran wanted a deal, has since told Axios that he faces a big decision on whether to annihilate his Iranian foes and that anything could happen; the swing, within a single day, from predicting the war's end to weighing a major escalation illustrates the volatility of his position.
- **A harder tone:** In a Fox News interview, President Trump said Iran wants a deal but is not ready, that the US controls the Strait of Hormuz, and that he thinks the US will end up winning; the tone is harder than the optimism of a day earlier, and reasserts a maximalist US position rather than signalling an imminent settlement.
- **The direct-talks claim unconfirmed:** President Trump has claimed that direct talks with Iran are taking place, but there is no confirmation from Tehran that direct negotiations have resumed; a senior Iranian official has publicly rejected talks unless Iran's conditions – the lifting of the US blockade and the end of the war – are met, and the claim should be treated with caution.
- **The unreliability confirmed:** The swing confirms the caution flagged in recent editions that President Trump's signals are an unreliable guide to outcomes: over the course of this war he has repeatedly alternated between predicting imminent deals and threatening to annihilate Iran or bomb Oman, and his statements track his negotiating posture rather than the underlying reality; clients should not rely on his tone.
- **The underlying reality unchanged:** Beneath the shifting rhetoric, the underlying reality is unchanged: the Strait remains effectively shut, the core US blockade persists, Iran and the US remain apart on terms, and no reopening or agreement has been reached; the warming and the harder tone alike are signals, not facts, and the facts on the water have not changed.

WS Assessment: President Trump's swing from optimism to weighing annihilation confirms that his signals cannot be relied upon, and underlines why the alert has stayed at MAXIMUM throughout the warming. Clients should disregard the swings in his tone and focus on the underlying reality – the shut Strait and the persistent blockade – which has not changed.

3. BUT EASING THREADS CONTINUE – OIL EASES, A SAUDI-HOUTHI TRUCE PROPOSED

- **Oil eases to $104:** Oil prices have eased to around $104 a barrel, from recent highs above $107, after Saudi Arabia arranged additional oil shipments through Oman's Sohar port via ship-to-ship transfers, easing fears of a prolonged supply gap; Brent fell 1.5% and US crude dipped to around $101, a tangible easing driven by the rerouting of Saudi supply.
- **Saudi rerouting via Sohar:** Saudi Arabia's arrangement to move oil through Oman's Sohar port, on the Gulf of Oman outside the Strait, is a further route by which Gulf producers are bypassing the blockaded Strait – alongside the UAE's Fujairah exports and the resuming East-West pipeline – easing the pressure on the region's oil exports and on prices.
- **A Saudi-Houthi truce proposed:** Saudi Arabia has proposed a two-week truce with the Houthis, to be followed by direct talks between the kingdom and the group's leaders, according to a Lebanese daily citing informed sources; the proposal reached the Houthis, who control Sanaa, through Omani mediators after several days of Saudi contacts with the United States, offering a possible de-escalation on the Yemen front.
- **The Houthi pledge and the Iran-UAE thaw stand:** The Houthi pledge not to target non-Saudi commercial vessels – made to US officials at the US embassy in Muscat – and the Iran-UAE thaw stand; together with the oil easing and the proposed Saudi-Houthi truce, these are genuine threads of de-escalation, particularly on the Yemen front and for the UAE.
- **Real but against a harder tone:** These easing threads are real and encouraging, and point to a de-escalation on the Yemen front and an easing of the oil squeeze; but they are set against President Trump's harder tone, the persistent core blockade of the Strait, and the rogue-hardliner risk, and do not yet amount to a settlement or a reopening.

WS Assessment: The easing threads – the fall in oil, the Saudi rerouting via Sohar, the proposed Saudi-Houthi truce – are genuine and encouraging, and the Yemen front in particular may be moving toward a de-escalation. But they are set against a harder Trump tone and a persistent core blockade; clients should welcome the easing while holding posture until the Strait reopens and a durable de-escalation 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 tanker struck over the latest period was in the Strait, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The UAE's favourable threads hold:** The Iran-UAE thaw and the Houthi pledge not to target non-Saudi commercial vessels stand, and the UAE's Fujairah export route continues to bypass the Strait; the oil easing and the proposed Saudi-Houthi truce further ease the regional picture. The UAE remains in a relatively favourable position, though the harder Trump tone and the core blockade keep the danger elevated.
- **The risk of a US escalation:** President Trump's weighing of whether to annihilate Iran is a reminder that a US escalation remains possible, which would raise the risk to the Gulf states, including the UAE, that host US forces; the harder tone, while likely a negotiating posture, cannot be discounted, 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 diplomacy fail or the US escalate. Clients should hold high readiness and protect energy resilience.
- **The regional fronts:** The proposed Saudi-Houthi truce, if agreed, would ease the Yemen front; the Iran-UAE thaw and the Houthi pledge favour the UAE; but the core blockade of the Strait, the harder Trump tone, and the rogue-hardliner risk keep the overall picture severe. Israel continues operations in Lebanon, Gaza and Syria.

WS Assessment: The UAE remains 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 easing threads easing the regional picture. But the harder Trump tone, the core blockade, and the rogue-hardliner risk keep the danger elevated. Clients should hold high readiness, protect energy and water resilience, and watch both the easing threads and the risk of a US escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait still shut, easing elsewhere:** The Strait of Hormuz remains effectively shut, with only four vessels transiting on Thursday and the IRGC striking a Togo-flagged tanker; but easing continues elsewhere – oil down on the Saudi rerouting via Sohar, the Houthi pledge narrowing the Red Sea threat, and the proposed Saudi-Houthi truce – so the maritime picture is easing at the margins while the core route remains closed.
- **Oil eases to $104:** Oil has eased to around $104 a barrel, from recent highs above $107, on the Saudi rerouting via Oman's Sohar port and the easing of supply-gap fears; a reopening of the Strait would ease prices further, while a US escalation or a reversal would drive them higher.
- **Gulf producers bypassing the Strait:** Gulf producers are increasingly bypassing the blockaded Strait – the UAE through Fujairah, Saudi Arabia through the resuming East-West pipeline and now Oman's Sohar port – easing the impact of the closure on the region's oil exports, though the Strait remains the primary route and its closure keeps prices elevated.
- **A tanker struck in the Strait:** The IRGC struck a Togo-flagged tanker attempting passage through the Strait; the waters of the Strait remain hostile, and Iran continues to assert that no vessel may pass without its permission, so clients should not assume safe passage until a confirmed 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 at the margins – oil down, Gulf producers bypassing the Strait, the Red Sea threat narrowing – but the Strait itself remains shut and hostile. 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 warming turns ambivalent – but the UAE's threads hold, and no confirmed strike on UAE territory.** President Trump has swung to weighing whether to annihilate Iran, even as oil eases and a Saudi-Houthi truce is proposed; the Strait remains shut. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Iran-UAE thaw, the Houthi pledge, and the Fujairah route keep the UAE in a relatively favourable position, but the harder tone keeps the danger elevated.
- **COMPLETE DEPARTURES NOW – THE PICTURE IS AMBIVALENT AND A US ESCALATION IS POSSIBLE.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The picture is ambivalent, the Strait remains shut, and President Trump's weighing of a major escalation cannot be discounted; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A US ESCALATION OR A ROGUE ATTACK REMAINS POSSIBLE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; President Trump's harder tone and the rogue-hardliner risk mean a US escalation or a rogue attack cannot be discounted. 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, though oil has eased and Gulf producers are bypassing the Strait. 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 AND HOSTILE.** Despite the easing elsewhere, the Strait of Hormuz remains effectively shut, at four transits on Thursday, and a tanker was struck. 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 easing threads; disregard the swings in Trump's tone.** The oil easing, the proposed Saudi-Houthi truce, the Houthi pledge, and the Iran-UAE thaw are genuine positives, particularly for the UAE and the Yemen front; build on them while disregarding the swings in President Trump's tone, and hold posture until the Strait reopens and a durable de-escalation is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – the Warming Ambivalent, 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 warming has turned ambivalent – President Trump weighing a major escalation even as oil eases and a Saudi-Houthi truce is proposed – and the Strait remains shut. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch the easing threads and the risk of a US escalation.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; an ambivalent picture with the Strait still shut 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 picture will resolve favourably.
- **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 Strait reopens, the proposed Saudi-Houthi truce, the Iran-UAE thaw, a US escalation, a rogue hardliner attack, 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 reopening of the Strait, the lifting of the US blockade, a confirmed ceasefire, an agreed Saudi-Houthi truce, and a durable de-escalation with verified safe passage would allow the alert to come down. The easing threads are encouraging, but the harder Trump tone and the shut Strait keep this from being met; 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 – the central risk:** A US escalation, 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 warming ambivalent, the Strait still shut, a US escalation possible, but the easing threads and the UAE's favourable position holding; protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and disregard the swings in Trump's tone.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the warming turns ambivalent.** President Trump has swung from optimism to weighing whether to "annihilate" Iran, saying Iran is "not ready" for a deal and the US "controls" the Strait – even as oil eases to ~$104 (Saudi oil rerouted via Oman's Sohar port) and Saudi Arabia proposes a two-week truce with the Houthis. The Strait stays shut (four transits). The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **DISREGARD THE SWINGS IN TRUMP'S TONE – FOCUS ON THE UNDERLYING REALITY.** Trump's swing within a day from predicting the war's end to weighing annihilation confirms his signals are unreliable. Disregard the swings and focus on the underlying reality – the shut Strait, the persistent blockade – which has not changed.
- **WELCOME THE EASING THREADS – OIL DOWN, A SAUDI-HOUTHI TRUCE PROPOSED.** The fall in oil, the Saudi rerouting via Sohar, and the proposed Saudi-Houthi truce are genuine positives, particularly for the Yemen front. Welcome them while holding posture until the Strait reopens.
- **BUILD ON THE UAE'S FAVOURABLE THREADS.** The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, and the Fujairah route keep the UAE in a relatively favourable position. Build on them.
- **GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK.** Trump's weighing of annihilation and the rogue-hardliner risk mean a US escalation or a rogue attack cannot be discounted. Hold high readiness and guard against both.
- **Monitor for:** (1) whether the Strait reopens or a US escalation occurs; (2) the proposed Saudi-Houthi truce and the Iran-UAE thaw; (3) a rogue hardliner attack; (4) any strike on UAE territory; (5) an Iranian attack on Israel.
- **The warming turns ambivalent – emergency updates to follow.** Westminster Security will issue immediate updates on any reopening of the Strait, any US escalation, any breakthrough or collapse in the diplomacy, 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 ninetieth edition.** Day 203 of the war.

8. KEY POINTS

- **THE WARMING TURNS AMBIVALENT – TRUMP WEIGHS "ANNIHILATION."** President Trump has swung, within a single day, from predicting the war's end to weighing a "big decision" on whether to "annihilate" Iran ("anything could happen"), saying Iran is "not ready" for a deal and the US "controls" the Strait. His claim of direct talks is unconfirmed by Tehran. The swing confirms his signals are an unreliable guide; disregard them and focus on the underlying reality.
- **BUT EASING THREADS CONTINUE – OIL DOWN, A SAUDI-HOUTHI TRUCE PROPOSED.** Oil has eased to around $104, from above $107, after Saudi Arabia rerouted oil via Oman's Sohar port; and Saudi Arabia has proposed a two-week truce with the Houthis, then direct talks, via Omani mediators – a possible Yemen-front de-escalation. The Houthi pledge and the Iran-UAE thaw stand. These are genuine positives, set against the harder tone.
- **THE STRAIT STAYS SHUT – THE UNDERLYING REALITY UNCHANGED.** The Strait of Hormuz remains effectively shut, with only four vessels transiting on Thursday, and the IRGC struck a Togo-flagged tanker attempting passage; Iran asserts no vessel may pass without its permission. The core US blockade persists, Iran and the US remain apart on terms, and no reopening or agreement has been reached. The warming and the harder tone alike are signals, not facts.
- **THE UAE'S POSITION REMAINS FAVOURABLE.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, the Fujairah export route, and the easing threads keep the UAE in a relatively favourable position. But President Trump's weighing of a US escalation and the rogue-hardliner risk keep the danger elevated. Hold high readiness.
- **GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK.** President Trump's weighing of whether to "annihilate" Iran, while likely a negotiating posture, cannot be discounted, and the rogue-hardliner risk persists; a US escalation or a rogue attack would raise the risk to the Gulf states, including the UAE. Guard against both, hold high readiness, and protect energy resilience.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETIETH EDITION. DAY 203.** The warming has turned ambivalent – Trump weighing "annihilation" even as oil eases and a Saudi-Houthi truce is proposed – but the Strait remains shut, the core blockade persists, and no UAE territory has been struck. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and disregard the swings in Trump's tone. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 18th September 2026 – Information current as of 09:00 GMT

THE DIPLOMATIC WARMING HAS TURNED AMBIVALENT. PRESIDENT TRUMP HAS SWUNG, WITHIN A SINGLE DAY, FROM PREDICTING THE WAR'S END TO WEIGHING A "BIG DECISION" ON WHETHER TO "ANNIHILATE" IRAN ("ANYTHING COULD HAPPEN"), SAYING IRAN IS "NOT READY" FOR A DEAL AND THE US "CONTROLS" THE STRAIT; HIS CLAIM OF DIRECT TALKS IS UNCONFIRMED BY TEHRAN. THE SWING CONFIRMS HIS SIGNALS ARE AN UNRELIABLE GUIDE.

BUT GENUINE EASING THREADS CONTINUE: OIL HAS EASED TO ~$104 (SAUDI OIL REROUTED VIA OMAN'S SOHAR PORT), AND SAUDI ARABIA HAS PROPOSED A TWO-WEEK TRUCE WITH THE HOUTHIS, THEN DIRECT TALKS, VIA OMANI MEDIATORS. THE STRAIT ITSELF REMAINS EFFECTIVELY SHUT (FOUR TRANSITS THURSDAY), THE IRGC STRUCK A TOGO-FLAGGED TANKER, AND THE CORE BLOCKADE PERSISTS. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY; THE IRAN-UAE THAW AND THE HOUTHI PLEDGE STAND, 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.

DISREGARD THE SWINGS IN TRUMP'S TONE AND FOCUS ON THE UNDERLYING REALITY – THE SHUT STRAIT; WELCOME THE EASING THREADS; BUILD ON THE UAE'S FAVOURABLE POSITION; AND GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETIETH EDITION. DAY 203.