WESTMINSTER SECURITY

Great British Standards, Great British Security.

UAE SITREP DOCUMENT

DAY 216, THE 203RD EDITION. THE DIPLOMACY HARDENS INTO A STANDOFF OVER SEQUENCING. IRAN HAS RECEIVED A FORMAL US COUNTERPROPOSAL (A SEVEN-DAY TRUST-BUILDING PERIOD; BOTH SIDES AGREE ON THE PIECES BUT NOT THE ORDER), BUT TRUMP SAYS "WE BLOW THEM UP OR MAKE A DEAL" AND AXIOS REPORTS THAT RUBIO ORDERED IRAN'S UN DELEGATION TO LEAVE (IRAN DISPUTES THIS). UKMTO CONFIRMS THREE TANKERS STRUCK IN THE SOUTHERN STRAIT ON 29 SEPTEMBER (AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY). IRAN WARNS THE UAE OF "HIGHLY DANGEROUS CONSEQUENCES" OVER NETANYAHU'S ABU DHABI VISIT: THE IRAN-UAE THAW IS UNDER STRAIN. US FORCES COMPLETE THEIR WITHDRAWAL FROM IRAQ. NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

1 October 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠️ **MAXIMUM ALERT:** THE DIPLOMACY HAS HARDENED INTO A STANDOFF OVER SEQUENCING, THE US TONE HAS SHARPENED, AND IRAN HAS WARNED THE UAE DIRECTLY. THE ALERT REMAINS AT MAXIMUM. Iran has received a formal US counterproposal to its seven-day plan, and both sides describe a split over the order of steps rather than their content. Around that exchange the tone has hardened: President Trump said on Wednesday that "we blow them up or make a deal" and that the war will end "very soon, one way or the other", and Axios reports that Secretary of State Rubio ordered Iran's UN delegation to leave the United States after the talks stalled, an account Iran disputes. UKMTO has confirmed that three tankers, among them a crude carrier and an LNG carrier, were struck by unknown projectiles in the southern Strait of Hormuz on 29 September; these were vessels at sea, with the cause unconfirmed, and not a strike on UAE territory. Iran's Foreign Ministry has warned the UAE of "highly dangerous consequences" after Prime Minister Netanyahu's visit to Abu Dhabi, and Iran's security chief has told Abu Dhabi to stop "warmongering". The Iran-UAE thaw is under strain. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure. 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:** A COUNTERPROPOSAL ON THE TABLE, A HARDER TONE AROUND IT. The channel has produced a formal US document, which is more than the feedback reported yesterday: according to an official briefed on the talks, it sets out a seven-day trust-building period intended to return both governments to an enhanced version of the memorandum of understanding signed in June, with concrete steps on Iran's nuclear programme. Qatar continues to mediate, and Iran's president says Tehran will make every effort to bring an agreement to fruition. Against that: the sides remain split on sequencing, President Trump frames the choice as a strike or a deal and says he will not lift pressure before verifiable nuclear steps, the reported expulsion of the Iranian delegation

signals US impatience, and Iran's warnings to the UAE have sharpened. The document is a step in a process; it is not an agreement.

⚠️ **ASSESSMENT:** A DOCUMENT, NOT A DEAL. THE ESCALATION RISK HAS RISEN. THE ALERT STAYS AT MAXIMUM. The US counterproposal keeps the process alive, and the dispute is now narrow in form: both sides accept the components and disagree on their order. Narrow disputes over sequencing have nonetheless blocked this negotiation since the spring. President Trump's binary framing, his statement that the end is coming "one way or the other", and the reported expulsion of the Iranian delegation raise the probability of a US strike if the sequencing gap is not closed; Iran has said it will widen the war if attacked, naming US ships in the Indian Ocean and Gulf airports. For the UAE the more immediate change is Iran's direct warning over the Netanyahu visit, which comes on top of the aviation dispute that began on 24 September. The thaw has not collapsed, but it no longer offers the same assurance it did a week ago. There is NO CONFIRMED STRIKE on UAE territory. The posture remains MAXIMUM with high readiness.

1. SITUATION SUMMARY: DAY 216, A COUNTERPROPOSAL, A HARDER TONE, AND A WARNING TO THE UAE

The diplomacy has hardened into a standoff over sequencing. Iran's foreign minister, Araghchi, presented a formal US response to Tehran's seven-day plan at a cabinet meeting on Wednesday, after receiving it through Qatari mediators in Doha; according to an official briefed on the talks, "both sides agree on the pieces but not the order." Iran wants the blockade lifted, oil sanctions waived and frozen assets released before it reopens the Strait on day seven; President Trump says pressure will not be lifted before Iran takes verifiable nuclear steps. The US tone sharpened through the period: President Trump said in the Oval Office that "we blow them up or make a deal", and Axios reported that Secretary of State Rubio ordered Iran's UN delegation to leave the country after the talks stalled, which Iran's UN mission disputes, saying the departure was scheduled. At sea, UKMTO confirmed that three tankers were struck by unknown projectiles in the southern Strait of Hormuz on 29 September, with reports released some 24 hours late; the cause is unconfirmed and none was a strike on UAE territory. For the UAE, Iran has warned of "highly dangerous consequences" after Prime Minister Netanyahu's visit to Abu Dhabi on 27 September, and the aviation dispute that began when the UAE suspended Iranian airlines on 24 September continues. In the wider region, US forces completed their withdrawal from Iraq on 30 September, which the IRGC calls a "historic victory", and the Yemen front remains active. There is no confirmed strike on UAE territory, ports or infrastructure. 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 1 October)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. A counterproposal, but a harder US tone and a direct Iranian warning to the UAE. Complete departures; high readiness; suspend all Strait transits.
Diplomacy	**US COUNTERPROPOSAL RECEIVED.** A seven-day trust-building period back to an enhanced June memorandum, per an official briefed on the talks. The sides agree on the pieces, not the order. Qatar mediating.
US tone	**HARDER.** Trump: "We blow them up or make a deal." Axios: Rubio ordered Iran's UN delegation out (Iran says the departure was scheduled). Hegseth claims Iran's navy and air force destroyed (a US claim).
Strait incidents	**THREE TANKERS STRUCK (29 SEP).** UKMTO: a crude tanker, an LNG tanker and a third tanker hit by unknown projectiles in the southern Strait, reported a day late. At sea, cause unconfirmed, not a

	strike on UAE territory.
Iran and the UAE	**THAW UNDER STRAIN.** Iran warns of “highly dangerous consequences” over Netanyahu’s Abu Dhabi visit. UAE suspension of Iranian airlines (since 24 September); Iran reportedly restricts its airspace to UAE aircraft.
Region	**US LEAVES IRAQ; YEMEN ACTIVE.** US withdrawal from Iraq complete; IRGC claims victory. Saudi-aligned strikes on Houthi sites in Amran and Saada. Unconfirmed reports of a fire near Abqaiq. Saudi-Houthi truce not agreed.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure. DXB, DWC and AUH operating; several foreign carriers have extended Dubai suspensions.

WS Assessment: The process has produced a document, and the dispute has narrowed to sequencing. The tone around it has hardened on the US side, and Iran has turned its warnings directly on the UAE. Both developments raise the risk to clients in the UAE without any change on the ground in the Emirates themselves. The alert stays at MAXIMUM with high readiness.

2. THE DIPLOMACY: A FORMAL US COUNTERPROPOSAL, A SPLIT OVER SEQUENCING

- **The US response received:** Iran says it has received an official US response to its proposal to end the war. Araghchi presented it to President Pezeshkian at a cabinet meeting on Wednesday after receiving it from Qatari mediators in Doha. Pezeshkian said Iran "will make every effort to bring the agreement to fruition and will firmly stand up for the rights of the Iranian people." The content has not been published.
- **What the document is reported to contain:** According to an official briefed on the talks, the US document describes a seven-day period of trust-building intended to return both governments to an enhanced version of the memorandum of understanding signed in June, including concrete steps on Iran's nuclear programme. The same official said that "both sides agree on the pieces but not the order." These details come from a single briefed source and have not been confirmed by either government.
- **The sequencing gap:** Iran's plan asks the United States to halt military operations, end the blockade, waive oil sanctions and release frozen assets (reported at $12 billion), with the Strait reopening on day seven. President Trump says the administration will not lift pressure before Iran takes verifiable nuclear steps. Araghchi's position is that the US steps "are already in the MoU." The gap is the same one that has held since the UN General Assembly week.
- **The mediators:** Qatar has taken the lead, through its prime minister and foreign ministry, with Oman and Pakistan also carrying messages. A source involved in the negotiations told Israel's Channel 13 that the talks are "moving more in the direction of a clash than a deal"; we treat that as one participant's view, not as an assessment of the process.
- **Economic pressure on Iran:** Iran's currency fell to a record low beyond 2.5 million rials to the dollar on Tuesday. The US Treasury has sanctioned 10 individuals and companies accused of supplying equipment to Iran's military, and Treasury Secretary Bessent has predicted that Iran's economy will collapse within two weeks. That prediction is a US claim and should be read as pressure messaging.

WS Assessment: The US counterproposal keeps the process alive and narrows the dispute to the order of steps. That is progress in form only: the order of steps is the substance of the impasse, and nothing has been agreed. Clients should treat the document as a reason to keep watching, not as a reason to change posture.

3. A HARDER US TONE, AND THREE TANKERS STRUCK IN THE STRAIT

- **"We blow them up or make a deal":** Speaking in the Oval Office on Wednesday, President Trump said: "We blow them up or make a deal. But the time is coming. It's going to end very soon." Asked about negotiating with Iranian leaders, he added: "Maybe you blow them up." His statements continue to swing between deal talk and threats and are an unreliable guide to timing, but the binary framing is the sharpest this week.
- **The Iranian delegation reportedly told to leave:** Axios reports that Secretary of State Rubio ordered Iran's UN delegation, including Araghchi, to leave the United States after the talks reached an impasse. Iran's UN mission disputes the account, saying the delegation left on a schedule communicated to the State Department on 17 September. The facts are disputed; the reported order, if accurate, signals US impatience.
- **US claims of victory:** Defence Secretary Hegseth told troops at Quantico that US forces have "destroyed" Iran's navy and air force and crippled its air defences, and President Trump claims "total control" of the Strait. These are US claims. They sit against continuing attacks on shipping in the Strait and IRGC statements that its operations there continue, and should be read as disputed.
- **Three tankers struck:** UKMTO has confirmed, in warnings released on 30 September, that three tankers were struck by unknown projectiles in the southern part of the Strait of Hormuz on 29 September: a crude oil tanker damaged on its port side, an inbound tanker, and an LNG tanker. Vessel identities, damage and crew status have not been released, and UKMTO has made no attribution. These were vessels at sea; their distance from the UAE coast has not been reported, the cause is unconfirmed, and this is not a strike on UAE territory. The incident reported in yesterday's edition is one of the three.
- **Delayed reporting:** The three reports were published about 24 hours after the events, and incident times are listed as to be confirmed. Delayed disclosure means the picture in the Strait at any cutoff may be incomplete, and clients should assume that incidents can surface after the fact.

WS Assessment: The US tone has hardened around the diplomacy, and the Strait remains hostile: three tankers were struck in a single day, with no attribution and late reporting. The combination raises the risk of a US escalation without settling it. Clients should treat the Strait as closed to their vessels and hold readiness.

4. THE UAE: AN IRANIAN WARNING, THE AVIATION DISPUTE, AND AN AIRCRAFT INCIDENT

- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and none since the Barakah strike of 17 May 2026. The tanker incidents of 29 September were at sea in the Strait, with the cause unconfirmed.
- **Iran warns the UAE over the Netanyahu visit:** Prime Minister Netanyahu visited Abu Dhabi on Sunday 27 September and met President Sheikh Mohamed bin Zayed; the UAE has confirmed the visit. Iran's Foreign Ministry has warned of "highly dangerous consequences" and called Israel's presence in the region "extremely dangerous and alarming." Iran's Supreme National Security Council secretary, Mohsen Rezaei, said hosting Netanyahu would have no "positive consequences", told Abu Dhabi to stop "warmongering" and to drop its claims to Abu Musa and the Tunbs, and said US bases had not provided the UAE with security.
- **The aviation dispute:** Since 24 September the UAE's General Civil Aviation Authority has suspended flights by Iranian airlines to and from the UAE until further notice, citing US restrictions on Iranian carriers. Iran has reportedly restricted its airspace to UAE-registered aircraft in response. Iran's threat to render Gulf airports unable to function was conditioned on Gulf cooperation in the campaign to deny Iran its aviation. We have not found an Iranian statement linking the UAE suspension to that threat, but the condition Iran set is now closer to being met in Iranian eyes, and the airports threat should be read with that in mind.
- **The flydubai incident:** A flydubai flight from Dubai to Tel Aviv made an emergency landing at Tabuk in Saudi Arabia on 30 September after an assault on the flight deck in which the captain was injured. Israeli officials describe it as an attempted terrorist attack; the investigation is continuing, the motive has not been officially established, and there is no reported link to Iran. flydubai has suspended its Israel flights and Emirates has suspended codeshare flights to Tel Aviv on flydubai. This is an aviation security incident aboard a UAE carrier, not an attack on UAE territory.
- **UAE balancing:** The UAE has condemned the visit of Israel's national security minister, Ben Gvir, to the Temple Mount, days after hosting Netanyahu. UAE Vice President Sheikh Mansour bin Zayed's visit to Saudi Arabia, reported yesterday, was the first since the rift between the two states. The UAE continues to balance its relationships, but Tehran's reading of that balance has hardened this week.

WS Assessment: The UAE has not been struck, but Iran has now addressed it directly and by name, over the Netanyahu visit and its island claims, while the aviation dispute touches the condition attached to Iran's airports threat. The thaw is under strain. Clients should treat the airports threat as more relevant to the UAE than it was a week ago and hold high readiness.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait contested, flows partly recovered:** Oil is moving through and around the Strait in larger volumes than at the height of the war: Kpler data cited by Al Jazeera put September Gulf crude exports at their highest since the war began, and Strait flows at roughly 80 per cent of pre-war levels. That traffic moves under Iranian restrictions and alongside the US blockade of Iranian ports, insurance remains elevated, and three tankers were struck on 29 September. There is no verified safe passage, and the Strait does not meet the reopening test in our de-escalation gate. Flow figures vary by source and are to be verified.
- **Oil:** Brent traded around $100 to $104 a barrel through the period, rising on Wednesday as the talks stalled. The UAE has raised October fuel prices: Super 98 by about 16 per cent to AED 4.40 a litre, and diesel to AED 4.80 from AED 4.30.
- **Saudi energy:** Saudi Arabia has reportedly restored around half of the East-West pipeline's capacity, which corrects yesterday's description of the pipeline as shut; the figure is to be verified. Open-source accounts reported a fire at an Aramco pumping station west of Abqaiq at about 07:00 GMT on 30 September. There has been no statement from Saudi Arabia or Aramco and no Houthi claim; we treat the report as unverified.
- **The Yemen front:** Saudi and Yemeni government-aligned forces have struck Houthi missile launch platforms and bases in Amran and Saada governorates, aiming to reduce the group's ability to strike Saudi oil infrastructure. A Yemeni government military spokesman claims 468 operations against the Houthis (a claim). Pakistan's defence minister says Pakistan will use "whatever means are available" to defend Saudi Arabia, without confirming involvement in airstrikes, and the UN envoy has met Houthi negotiators. The Houthis hold the Red Sea coast and maintain their blockade of Saudi shipping. The proposed Saudi-Houthi truce has not been agreed.
- **Iraq, Bahrain and the UK:** US forces completed their withdrawal from Iraq on 30 September, ending Operation Inherent Resolve with the last departure from Erbil Air Base; the IRGC called it a "historic victory" and said "America must leave the region", Iran-aligned Iraqi groups have refused to disarm, and the disarmament deadline has moved to June 2027. Bahrain has joined CENTCOM's multinational attack-drone task force. In the UK, Prime Minister Burnham says there are "strong indications" that Iran played a part in the RAF Fairford incident, in which five men were arrested and later bailed; Araghchi has rejected the claim. The Iranian role is alleged and disputed.

WS Assessment: With US forces out of Iraq, the Gulf host states, the UAE among them, now carry the US footprint nearest Iran, and the IRGC's call for a wider US exit names that footprint. The Yemen front is active and the Saudi energy picture is mixed. UAE-linked operators should continue to suspend all Strait transits pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **A harder picture, and no confirmed strike on UAE territory.** The US tone has hardened around a counterproposal that has not closed the sequencing gap, three tankers were struck in the Strait, and Iran has warned the UAE directly over the Netanyahu visit. There is no confirmed damaging strike on UAE territory, ports or infrastructure. The thaw, which has shielded the UAE, is under strain; the airports threat and the risk of a US escalation keep the danger elevated.
- **COMPLETE DEPARTURES NOW: SCHEDULED CAPACITY IS NARROWING.** DXB, DWC and AUH are operating, but several foreign carriers have extended their Dubai suspensions (Air France to 13 October; SWISS and others to 24 October; Air Canada to mid-January 2027), and flydubai has suspended its Israel flights. Complete any deferred non-essential departure on scheduled commercial flights without delay, and confirm bookings directly with the carrier.
- **HOLD READINESS AT A HIGH LEVEL: THE AIRPORTS THREAT IS NOW MORE RELEVANT TO THE UAE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level. Iran's threat to Gulf airports was conditioned on cooperation in the aviation-denial campaign, and the UAE has suspended Iranian airlines since 24 September; Iran has also warned the UAE over the Netanyahu visit. Review shelter locations and NCEMA guidance, keep go-bags current, plan for disruption at UAE airports, and be prepared to shelter promptly on any alert. The UAE hosts US forces at Al Dhafra.
- **PROTECT ENERGY AND WATER RESILIENCE.** Flows have partly recovered, but the Strait remains contested and fuel prices in the UAE have risen sharply for October. Keep water, fuel and generator contingencies ready, and budget for higher fuel costs; the Fujairah route continues to provide a degree of insulation for UAE exports.
- **Shipping: SUSPEND ALL STRAIT TRANSITS. THREE TANKERS HAVE BEEN STRUCK.** Three tankers were struck by unknown projectiles in the southern Strait on 29 September, with reports released a day late. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat the Strait as closed until a confirmed reopening with verified safe passage is in place.
- **Aviation security and UK-linked staff.** Note the flydubai incident and the suspension of Israel routes, and review travel arrangements for staff on affected routes. For UK-linked personnel, note the UK government's statement on the RAF Fairford incident and follow official UK guidance; the Iranian role is alleged and disputed.

Return Guidance: MAXIMUM Held, High Readiness, a Counterproposal but a Harder Tone

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. A US counterproposal is on the table, but the sides are split on sequencing, the US tone has hardened, three tankers have been struck in the Strait, and Iran has warned the UAE directly. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, note the airports threat, and plan for protracted disruption.

- **All returns, SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a counterproposal with the sequencing unresolved is not a settlement.
- **Non-essential personnel, COMPLETE DEPARTURES NOW:** Use the open airports to finish any deferred departures without delay, on scheduled commercial flights, and allow for carrier suspensions when booking; do not defer in expectation of an imminent resolution.
- **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 the sequencing talks, any US strike on Iran and Iran's warned widening of the war, Iran's posture toward the UAE, the Houthi campaign, and any strike toward UAE territory or airports.

- **Business and compliance clients:** Review exposure given the US sanctions campaign, including the new Treasury designations and the US restrictions on Iranian airlines, and consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM to HIGH):** An agreed sequence, the lifting of the US blockade, the Strait reopened with verified safe passage, a confirmed ceasefire, and a durable de-escalation across all fronts would allow the alert to come down. None of these is in place; Westminster Security is ready to lower the alert to HIGH promptly once they are.
- **Further escalation, the central risk:** A US strike on Iran, which Iran warns would widen the war to US ships in the Indian Ocean and to Gulf airports, a further serious incident in the Strait, an Iranian move against the UAE following its warnings, a collapse of the mediation, or a strike on UAE territory or airports would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness. A counterproposal but no agreed sequence, a harder US tone, three tankers struck, and the Iran-UAE thaw under strain. Protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and note the airports threat.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS. A document, not a deal.** Iran has received a formal US counterproposal (a seven-day trust-building period), but the sides are split on the order of steps. President Trump says "we blow them up or make a deal", and Axios reports that Rubio ordered Iran's UN delegation to leave (Iran disputes this). Three tankers were struck in the southern Strait on 29 September (at sea, cause unconfirmed). Iran has warned the UAE over the Netanyahu visit. There is no confirmed strike on UAE territory.
- **WATCH THE SEQUENCING, NOT THE STATEMENTS.** The test of the counterproposal is whether the sides agree an order of steps: a blockade lifted, the Strait reopened with verified safe passage. Statements from either capital, optimistic or threatening, are signals; hold posture until the sequence is agreed and implemented.
- **TREAT THE IRANIAN WARNING TO THE UAE AS A CHANGE.** Iran has addressed the UAE directly over the Netanyahu visit and its island claims, and the aviation dispute touches the condition attached to Iran's airports threat. The thaw is under strain; do not rely on it as a shield.
- **NOTE THE ESCALATION RISK.** President Trump's binary framing and the reported expulsion of the Iranian delegation raise the risk of a US strike if the gap is not closed. Iran has said it would widen the war to US ships in the Indian Ocean and to Gulf airports. Hold high readiness.
- **KEEP SHIPPING OUT OF THE STRAIT AND BUILD ON THE FUJAIRAH ROUTE.** Partly recovered flows do not amount to safe passage. Suspend all Strait transits pending a confirmed reopening, and use the Fujairah route. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) whether the sides agree a sequence or the talks break; (2) any US strike on Iran; (3) Iran's warned widening of the war, to US ships in the Indian Ocean and against Gulf airports; (4) any Iranian step against the UAE following its warnings, including on aviation; (5) further incidents in the Strait; (6) the Houthi campaign and the Saudi energy picture; (7) any strike on UAE territory.
- **A harder picture. Emergency updates to follow.** Westminster Security will issue immediate updates on any agreement or collapse of the talks, any reopening of the Strait, any US strike on Iran, any threat to or strike on UAE territory or airports, 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 two hundred and third edition.** Day 216 of the war.

8. KEY POINTS

- **A FORMAL US COUNTERPROPOSAL.** Iran has received an official US response to its seven-day plan, passed through Qatari mediators. According to an official briefed on the talks, it sets out a seven-day trust-building period returning both sides to an enhanced June memorandum, with concrete nuclear steps. The sides agree on the pieces but not the order.
- **A HARDER US TONE.** President Trump says “we blow them up or make a deal” and that the war will end “very soon, one way or the other.” Axios reports that Rubio ordered Iran’s UN delegation to leave; Iran says the departure was scheduled. US claims to have destroyed Iran’s navy and to control the Strait are disputed by events at sea.
- **THREE TANKERS STRUCK IN THE STRAIT.** UKMTO confirms that a crude tanker, an LNG tanker and a third tanker were struck by unknown projectiles in the southern Strait on 29 September, reported a day late. These were vessels at sea, with the cause unconfirmed; this is not a strike on UAE territory.
- **IRAN WARNS THE UAE. THE THAW IS UNDER STRAIN.** Iran has warned the UAE of “highly dangerous consequences” over Netanyahu’s Abu Dhabi visit, and its security chief has told Abu Dhabi to stop “warmongering.” The UAE has suspended Iranian airlines since 24 September, and Iran has reportedly restricted its airspace to UAE aircraft. The airports threat is more relevant to the UAE than it was a week ago.
- **THE REGION SHIFTS.** US forces have left Iraq and the IRGC calls for a wider US exit from the region. The Yemen front is active, with Saudi-aligned strikes in Amran and Saada and an unverified report of a fire near Abqaiq. The East-West pipeline is reportedly back to around half capacity. The Saudi-Houthi truce has not been agreed.
- **MAXIMUM HELD, HIGH READINESS. NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDRED AND THIRD EDITION. DAY 216.** A document but no agreed sequence, a harder US tone, three tankers struck, and the Iran-UAE thaw under strain; 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, note the airports threat, and plan for protracted disruption. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 1st October 2026. Information current as of 09:00 GMT.

THE DIPLOMACY HAS HARDENED INTO A STANDOFF OVER SEQUENCING. IRAN HAS RECEIVED A FORMAL US COUNTERPROPOSAL, A SEVEN-DAY TRUST-BUILDING PERIOD BACK TO AN ENHANCED JUNE MEMORANDUM, BUT THE SIDES AGREE ON THE PIECES AND NOT THE ORDER. PRESIDENT TRUMP SAYS “WE BLOW THEM UP OR MAKE A DEAL”, AND AXIOS REPORTS THAT RUBIO ORDERED IRAN’S UN DELEGATION TO LEAVE, WHICH IRAN DISPUTES.

THREE TANKERS WERE STRUCK BY UNKNOWN PROJECTILES IN THE SOUTHERN STRAIT ON 29 SEPTEMBER: VESSELS AT SEA, CAUSE UNCONFIRMED, NOT A STRIKE ON UAE TERRITORY. IRAN HAS WARNED THE UAE OF “HIGHLY DANGEROUS CONSEQUENCES” OVER NETANYAHU’S ABU DHABI VISIT, AND THE AVIATION DISPUTE CONTINUES; THE IRAN-UAE THAW IS UNDER STRAIN. US FORCES HAVE LEFT IRAQ. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM ALERT HELD, HIGH READINESS. COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH THE SEQUENCING, NOT THE STATEMENTS; TREAT IRAN’S WARNING TO THE UAE AS A CHANGE; NOTE THE ESCALATION RISK AND THE AIRPORTS THREAT; AND KEEP SHIPPING OUT OF THE STRAIT. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND THIRD EDITION. DAY 216.