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DAY 200 (200 DAYS OF WAR) – STALLED DIPLOMACY, A PERSISTENT SQUEEZE, AND A REVEALING REPORT: THE OMAN TALKS REMAIN POSTPONED WITH NO NEW DATE; OIL HOLDS ABOVE $100 (FOUR-MONTH HIGHS); THE YEMENI GOVERNMENT CONCEDES A "PAINFUL" RED SEA DEFEAT BUT REINFORCES. THE NYT REPORTS THE JULY ATTACKS THAT COLLAPSED THE JUNE CEASEFIRE WERE A ROGUE HARDLINER ACTION, UNAUTHORISED BY PEZESHKIAN OR THE IRGC. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

15 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** AT THE 200-DAY MARK, THE WAR REMAINS IN A PHASE OF STALLED DIPLOMACY AND A PERSISTENT, COMPREHENSIVE SQUEEZE ON THE REGION'S OIL EXPORTS. The Iran-Gulf talks on the Strait of Hormuz, postponed on Sunday, have not been rescheduled, and oil is holding above $100 a barrel at four-month highs. On the Red Sea front, the Yemeni government has conceded a "painful" defeat, with the Houthis holding the port of Mocha and the mid-strait island, though the government has vowed to send more forces to retake the coast. In a significant report, the New York Times has said that the July attacks in the Strait that collapsed the June ceasefire were carried out by hardliners without the authorization of President Pezeshkian, the IRGC commander, or the Supreme National Security Council – pointing to a rogue hardliner faction, and suggesting the dovish leadership was not behind the escalation. 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 transits.

⚠ **ASSESSMENT:** THE ROGUE-HARDLINER REPORT IS A DOUBLE-EDGED SIGNAL – AND THE UAE'S BILATERAL THAW IS THE MORE RELIABLE THREAD. The New York Times report that the July attacks were the work of rogue hardliners, unauthorized by Iran's president, its military command, or its security council, is significant and double-edged. On one hand, it is encouraging: it suggests that Iran's leadership, including the dovish President Pezeshkian, has not been behind the worst escalations, and that a genuine de-escalation may be possible if the leadership can assert control – consistent with Pezeshkian's outreach, including his thaw with the UAE. On the other, it is a warning: a rogue hardliner faction able to launch major attacks without authorization is a dangerous wildcard, capable of sabotaging any de-escalation, as it did the June ceasefire. For the UAE, the implication is that its bilateral thaw with Tehran – conducted with Pezeshkian's leadership – is a more reliable thread than the stalled, faction-riven multilateral process, but that the risk of a rogue escalation persists. Meanwhile the comprehensive squeeze persists, oil is at four-month highs, and the Oman talks have not been rescheduled. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 200 – STALLED DIPLOMACY, A PERSISTENT SQUEEZE

Two hundred days into the war, the conflict remains in a phase of stalled diplomacy and a persistent, comprehensive squeeze on the region's oil exports, with a significant report shedding new light on Iran's internal divisions. The Iran-Gulf talks on the Strait of Hormuz, postponed on Sunday over a lack of Gulf consensus, have not been rescheduled, and oil is holding above $100 a barrel at four-month highs, driven by the squeeze and the Red Sea escalation. On the Red Sea front, the Yemeni government has conceded a "painful" defeat, with the Houthis holding the port of Mocha and the island in the middle of the Bab el-Mandeb, though the government has vowed to send more forces to the coast to retake it. In a significant report, the New York Times has said that the July attacks in the Strait of Hormuz that collapsed the June ceasefire were carried out by hardliners without the authorization of President Pezeshkian, the commander of the Revolutionary Guards, or the Supreme National Security Council, with Iranian investigations tracing them to a hardline cleric – pointing to a rogue hardliner faction, and suggesting Iran's dovish leadership was not behind the worst escalation. The Iran-UAE thaw reported over the weekend stands, and remains a positive for the UAE. In the Gulf, the tanker war remains at a lower intensity, though a products tanker was struck near an Iranian island over the weekend. 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 0900 GMT Tuesday 15 September – Day 200)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. Stalled diplomacy, a persistent squeeze. Complete departures; high readiness; suspend all transits.
Oman talks	**STILL POSTPONED.** The Iran-Gulf Hormuz talks remain postponed, with no new date; the diplomatic thread is stalled.
NYT report	**JULY ATTACKS A ROGUE ACTION.** The NYT reports the July attacks that collapsed the June ceasefire were carried out by rogue hardliners, unauthorised by Pezeshkian or the IRGC. Double-edged.
Oil	**ABOVE $100.** Oil holds above $100 at four-month highs on the squeeze and the Red Sea escalation. Upward pressure persists.
Red Sea front	**A "PAINFUL" DEFEAT.** The Yemeni government concedes the loss of Mocha and the island; it vows to send more forces. The Houthis hold their gains.
Iran-UAE thaw	The weekend's Iran-UAE thaw stands, uncontradicted – a positive the UAE should build on, and more reliable than the stalled multilateral process.
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: At the 200-day mark, the war is in a phase of stalled diplomacy and a persistent squeeze, with oil at four-month highs; the NYT report on the July attacks reveals a rogue hardliner faction – a double-edged signal that Iran's leadership was not behind the worst escalation, but that a dangerous wildcard persists. The alert stays at MAXIMUM with high readiness. The Iran-UAE thaw remains a positive; clients should watch it, the rogue-hardliner dynamic, and any rescheduling of the Oman talks.

2. THE OMAN TALKS REMAIN POSTPONED; THE YEMENI GOVERNMENT'S "PAINFUL" DEFEAT; OIL AT FOUR-MONTH HIGHS

- **The talks not rescheduled:** The Iran-Gulf talks on the Strait of Hormuz, postponed on Sunday over a lack of Gulf consensus – Saudi Arabia's objections to the proposed corridor arrangement and Bahrain's refusal to attend – have not been rescheduled, and no new date has been set; the diplomatic thread that emerged over the weekend remains stalled, though Oman has stressed its continued commitment to dialogue.
- **The Yemeni government's defeat:** On the Red Sea front, the Yemeni government has conceded a "painful" defeat, with an official acknowledging the loss of the port of Mocha and the island in the middle of the Bab el-Mandeb to the Houthis; the government has vowed to send more forces to the Red Sea coast to retake it, but for now the Houthis hold their gains and their grip on the strait.
- **The Red Sea threat to Saudi oil:** The Houthi control of Mocha and the island tightens the threat to Saudi Arabia's Red Sea oil exports – the crucial alternative route with the Strait of Hormuz impeded – and the escalation between the Houthis and the Saudi military has ratcheted up the pressure on global oil supplies, pushing crude toward four-month highs.
- **Oil above $100:** Oil prices are holding above $100 a barrel at four-month highs, driven by the comprehensive squeeze on the region's oil exports, the Red Sea escalation, and the stalled diplomacy; US gasoline prices remain well above pre-war levels, and the upward pressure on prices persists with no near-term relief in sight.
- **Trump's reimbursement demand:** President Trump has called for countries to reimburse the United States for helping oil shipments through the Strait, insisting oil is flowing through Hormuz with US assistance – a demand that has drawn attention but does not alter the underlying picture of a Strait far below normal traffic and a comprehensive squeeze on the region's exports.

WS Assessment: The stalled talks, the Yemeni government's defeat, and oil at four-month highs confirm that the comprehensive squeeze persists with no near-term relief; the Red Sea front remains a key driver, with the Houthis holding their gains. Clients should protect energy resilience and watch whether the Oman talks are rescheduled and whether the Yemeni counter-offensive gains ground.

3. THE NYT REPORT – THE JULY ESCALATION A ROGUE HARDLINER ACTION

- **The report:** The New York Times has reported that the July attacks on shipping in the Strait of Hormuz – which collapsed the June memorandum of understanding and the ceasefire it embodied, and reignited the war – were carried out by hardliners without the authorization of President Pezeshkian, the commander of the Revolutionary Guards, or the Supreme National Security Council, with Iranian investigations reportedly tracing them to a hardline cleric.
- **A rogue faction:** The report points to a rogue hardliner faction within Iran able to launch major attacks without the authorization of the country's civilian and military leadership – a significant revelation about Iran's internal divisions, and one that suggests the collapse of the June ceasefire was a deliberate act of sabotage by hardliners opposed to a settlement, rather than a decision by Iran's leadership.
- **An encouraging reading:** On one reading, the report is encouraging: it indicates that Iran's leadership, including the dovish President Pezeshkian, has not been behind the worst escalations, and that a genuine de-escalation may be achievable if the leadership can assert control over the hardliners – consistent with Pezeshkian's repeated outreach, including his recent thaw with the UAE.
- **A warning reading:** On another, it is a warning: a rogue hardliner faction capable of launching major attacks without authorization is a dangerous wildcard, able to sabotage any de-escalation – as it did the June ceasefire – and to trigger a renewed escalation regardless of the leadership's intentions; the risk of a rogue attack, including on the Gulf states, persists.
- **Implications for the diplomacy:** The report underlines both the possibility and the fragility of a de-escalation: the leadership may want one, but the hardliners can wreck it; and it suggests that bilateral channels with Pezeshkian's leadership – such as the UAE's thaw – may be more reliable than processes vulnerable to hardliner sabotage, while the risk of a rogue escalation remains.

WS Assessment: The NYT report is a genuinely significant, double-edged signal: it suggests Iran's leadership was not behind the worst escalation and that a de-escalation is possible, but it identifies a rogue hardliner faction as a persistent, dangerous wildcard. For the UAE, it reinforces the value of its bilateral thaw with Pezeshkian's leadership, while underlining that the risk of a rogue escalation – including against the Gulf – cannot be discounted.

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, a products tanker, was hit near an Iranian island, not near the UAE, and the quieter Gulf tanker war has kept the immediate maritime danger near the UAE reduced.
- **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 – stands, and remains the most favourable diplomatic development for the UAE; conducted with Pezeshkian's leadership, it may prove more durable than the stalled, faction-riven multilateral process.
- **The rogue-hardliner risk:** The NYT report is a reminder that, even as the UAE pursues its thaw with Iran's leadership, a rogue hardliner faction could launch an attack – including on the Gulf states – without the leadership's authorization; the UAE's diplomatic gains do not eliminate the risk of a rogue escalation, and readiness must be maintained.
- **The UAE's energy picture:** The comprehensive squeeze and oil at four-month highs keep the UAE's energy picture tight, though the UAE has not been struck; progress on the Iran-UAE thaw and a rescheduling of the Oman talks could begin to ease the pressure, but the stalled diplomacy points to continued tightness for now.
- **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, including a rogue hardliner attack, should the diplomacy fail. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE has not been struck, and its bilateral thaw with Iran's leadership is a genuine positive and a more reliable thread than the stalled multilateral process; but the rogue-hardliner risk identified by the NYT, and the persisting squeeze, keep the danger and the energy pressure elevated. Clients should hold high readiness, protect energy and water resilience, build on the thaw, and remain vigilant for a rogue 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 and in single-digit daily transits; the Bab el-Mandeb and the Red Sea, with the Houthis holding the coast and the mid-strait island; and the East-West pipeline, still shut – the comprehensive squeeze persists, and the stalled talks offer no near-term relief.
- **Oil at four-month highs:** Oil is holding above $100 a barrel at four-month highs, driven by the squeeze, the Red Sea escalation, and the stalled diplomacy; the upward pressure persists, and a further escalation – or a rogue hardliner attack – would drive prices higher, while a rescheduling and success of the talks could ease them.
- **A vessel struck near an Iranian island:** A products tanker was struck near an Iranian island in the Strait over the weekend, with most of its crew rescued and one reported missing; the incident, near the Iranian side of the Strait rather than near the UAE, underlines that the waters of the Strait remain hostile despite the lower intensity of the US-Iran exchange.
- **The Red Sea front:** The Red Sea front remains active and contested, with the Houthis holding Mocha and the island and the Yemeni government vowing to send more forces to retake the coast; the outcome will bear on the security of the Bab el-Mandeb and Saudi Red Sea oil exports, and on the pressure on global oil prices.
- **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 at four-month highs, and the stalled talks offer no near-term relief; the contested Red Sea front and the rogue-hardliner risk add uncertainty. For UAE-linked operators, all transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **Stalled diplomacy and a persistent squeeze – but the Iran-UAE thaw stands, and no confirmed strike on UAE territory.** The Oman talks remain postponed and oil holds above $100, 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 NYT report on rogue Iranian hardliners is a reminder that a rogue escalation remains possible.
- **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, the squeeze persists, and a rogue escalation is possible; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A ROGUE ESCALATION REMAINS POSSIBLE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; the Oman talks have stalled, and the NYT report underlines that a rogue hardliner attack – including on the Gulf – could occur without Iran's leadership's authorization. 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 AT FOUR-MONTH HIGHS.** All major Gulf oil routes remain threatened and oil is at four-month 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 – conducted with Pezeshkian's leadership – remains a positive the UAE should build on, and may prove more durable than the stalled Gulf-wide talks; watch whether the Oman talks are rescheduled, while holding posture and guarding against a rogue escalation.

Return Guidance: MAXIMUM Held, High Readiness – Stalled Diplomacy, a Rogue-Hardliner Risk

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. Two hundred days in, the diplomacy has stalled, oil is at four-month highs, and the NYT report underlines a rogue-hardliner risk; but the Iran-UAE thaw stands and no UAE territory has been struck. Clients should complete departures now, hold high readiness, suspend all transits, protect energy and water resilience, and watch the diplomacy and the rogue-hardliner dynamic.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation is confirmed; a stalled diplomacy, a persistent squeeze and a rogue-hardliner risk 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, a rogue hardliner 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 leadership's assertion of control over the hardliners, 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 stalled talks and the rogue-hardliner risk have delayed this; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed.
- **Further escalation – the central risk:** A rogue hardliner attack, a definitive collapse of the diplomacy, a strike on UAE territory, 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 – stalled diplomacy, a persistent squeeze, a rogue-hardliner risk, but the Iran-UAE thaw standing; 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 – 200 days in, stalled diplomacy and a persistent squeeze.** The Oman talks remain postponed with no new date, and oil holds above $100 at four-month highs; the Yemeni government has conceded a "painful" Red Sea defeat but vows to reinforce. The NYT reports the July attacks that collapsed the June ceasefire were a rogue hardliner action, unauthorised by Pezeshkian or the IRGC. The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **WEIGH THE ROGUE-HARDLINER REPORT – A DOUBLE-EDGED SIGNAL.** The NYT report suggests Iran's leadership was not behind the worst escalation – encouraging for a de-escalation – but identifies a rogue hardliner faction as a dangerous wildcard capable of sabotaging it. Watch whether the leadership asserts control, and guard against a rogue escalation.
- **BUILD ON THE IRAN-UAE THAW – THE MORE RELIABLE THREAD.** The Iran-UAE thaw, conducted with Pezeshkian's leadership, may prove more durable than the stalled, faction-riven multilateral process; it remains the most favourable development for the UAE. Watch whether it develops.
- **PROTECT ENERGY AND WATER RESILIENCE – OIL AT FOUR-MONTH HIGHS.** With all major Gulf oil routes threatened and oil at four-month 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) a rogue hardliner escalation; (3) any strike on UAE territory, ports or infrastructure; (4) the contested Yemen front and the Houthi position on Bab el-Mandeb; (5) an Iranian attack on Israel.
- **200 days in, stalled diplomacy and a rogue-hardliner risk – emergency updates to follow.** Westminster Security will issue immediate updates on any rogue hardliner escalation, any rescheduling or collapse of the Oman talks, any breakthrough in the Iran-UAE thaw, any strike on UAE territory, 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-seventh edition.** Day 200 of the war.

8. KEY POINTS

- **200 DAYS OF WAR – STALLED DIPLOMACY AND A PERSISTENT SQUEEZE.** Two hundred days in, the war remains in a phase of stalled diplomacy and a comprehensive squeeze on the region's oil exports. The Iran-Gulf Hormuz talks remain postponed with no new date, and oil holds above $100 at four-month highs. All major oil routes remain under threat, and the stalled talks offer no near-term relief.
- **THE NYT REPORT – THE JULY ESCALATION A ROGUE HARDLINER ACTION.** The New York Times reports that the July attacks that collapsed the June ceasefire were carried out by hardliners without the authorization of President Pezeshkian, the IRGC commander, or the Supreme National Security Council. It is a double-edged signal: encouraging, in that Iran's leadership was not behind the worst escalation; but a warning, in that a rogue hardliner faction is a dangerous wildcard capable of sabotaging any de-escalation.
- **THE YEMENI GOVERNMENT'S "PAINFUL" DEFEAT – THE HOUTHIS HOLD THEIR GAINS.** The Yemeni government has conceded a "painful" defeat, with the Houthis holding the port of Mocha and the island in the middle of the Bab el-Mandeb; it has vowed to send more forces to retake the coast. The Houthi control tightens the threat to Saudi Arabia's Red Sea oil exports and has pushed crude toward four-month highs.
- **THE IRAN-UAE THAW STANDS – THE MORE RELIABLE THREAD.** The Iran-UAE thaw reported over the weekend stands, and remains the most favourable diplomatic development for the UAE; conducted with Pezeshkian's leadership, it may prove more durable than the stalled, faction-riven multilateral process. But the NYT report is a reminder that a rogue hardliner escalation – including on the Gulf – remains possible; readiness must be maintained.
- **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; a products tanker was struck near an Iranian island, not near the UAE. The Gulf tanker war remains at a lower intensity, but the comprehensive squeeze and the rogue-hardliner risk 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-SEVENTH EDITION. DAY 200.** At the 200-day mark, the diplomacy has stalled, oil is at four-month highs, and a rogue-hardliner risk has been revealed – 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, any rescheduling of the Oman talks, and the rogue-hardliner dynamic. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

Prepared 15th September 2026 – Information current as of 09:00 GMT

TWO HUNDRED DAYS INTO THE WAR, THE CONFLICT REMAINS IN A PHASE OF STALLED DIPLOMACY AND A PERSISTENT, COMPREHENSIVE SQUEEZE ON THE REGION'S OIL EXPORTS. THE IRAN-GULF HORMUZ TALKS REMAIN POSTPONED WITH NO NEW DATE; OIL HOLDS ABOVE $100 AT FOUR-MONTH HIGHS; AND THE YEMENI GOVERNMENT HAS CONCEDED A "PAINFUL" RED SEA DEFEAT, WITH THE HOUTHIS HOLDING MOCHA AND THE MID-STRAIT ISLAND, BUT VOWS TO REINFORCE.

IN A SIGNIFICANT REPORT, THE NEW YORK TIMES SAYS THE JULY ATTACKS THAT COLLAPSED THE JUNE CEASEFIRE WERE A ROGUE HARDLINER ACTION, UNAUTHORISED BY PRESIDENT PEZESHKIAN, THE IRGC COMMANDER OR THE SUPREME NATIONAL SECURITY COUNCIL – A DOUBLE-EDGED SIGNAL (IRAN'S LEADERSHIP WAS NOT BEHIND THE WORST ESCALATION, BUT A ROGUE FACTION IS A DANGEROUS WILDCARD). THE IRAN-UAE THAW STANDS AND IS THE MORE RELIABLE THREAD. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY. 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 GUARD AGAINST A ROGUE HARDLINER ESCALATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND EIGHTY-SEVENTH EDITION. DAY 200.