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DAY 208 – GENUINE DIPLOMATIC MOVEMENT AT THE UNGA, BUT NO BREAKTHROUGH: THE FIRST INDIRECT US-IRAN TALKS SINCE JUNE (A "VERY GOOD" 3-HOUR MEETING VIA QATARI MEDIATORS), AND IRAN OFFERS TO REOPEN THE STRAIT WITHIN 7 DAYS IF THE US LIFTS ITS BLOCKADE, EASES MILITARY PRESSURE, AND RELEASES FROZEN ASSETS – BUT NO DIRECT TRUMP-PEZESHKIAN MEETING, NO DEAL, AND TRUMP THREATENED TO "ANNIHILATE" IRAN AND TO STRIKE ANOTHER NUCLEAR SITE ("PICKAXE MOUNTAIN"). THE STRAIT STAYS LARGELY CLOSED. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

23 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE PIVOTAL DAY OF THE UN GENERAL ASSEMBLY PRODUCED GENUINE DIPLOMATIC MOVEMENT – THE FIRST INDIRECT US-IRAN TALKS SINCE JUNE, AND A CONCRETE IRANIAN OFFER TO REOPEN THE STRAIT – BUT NO BREAKTHROUGH OR AGREEMENT; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. US and Iranian officials held a three-hour meeting at the assembly, conducted indirectly through Qatari mediators, which President Trump called "very good" but which Iran downplayed as "not anything new"; no direct Trump-Pezeshkian meeting took place. Crucially, Iran offered to reopen the Strait of Hormuz to Gulf shipping within seven days if the US lifts its blockade, eases military pressure, and releases frozen Iranian assets – the clearest path to a reopening yet. But no deal was reached: President Trump accused Iran of stalling until after the US midterms, threatened in his UN address to "annihilate" Iran if no deal is reached soon, and told the Gulf leaders the US may strike another suspected Iranian nuclear site. President Pezeshkian said Iran was ready for dialogue but would not accept "the language of force." 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.

⚖ **MIXED SIGNALS:** GENUINE DIPLOMATIC MOVEMENT – BUT NO DEAL, AND THE THREATS PERSIST. The UN General Assembly produced the most significant diplomatic movement of this phase, alongside a persistent harder tone. On the movement side: US and Iranian officials held their first talks, albeit indirect and through Qatari mediators, since the June ceasefire unravelled, in a three-hour meeting President Trump called "very good"; Iran offered to reopen the Strait within seven days if the US lifts its blockade, eases military pressure, and releases frozen assets – a concrete path to a reopening; and President Pezeshkian said Iran was ready for dialogue and diplomacy. On the harder side: no direct Trump-Pezeshkian meeting occurred, Iran downplayed the talks as "not anything new," and no agreement was reached; President Trump accused Iran of stalling until after the midterms, threatened to "annihilate" Iran, and told the Gulf leaders the US may strike another Iranian nuclear

site; and the Strait remains largely closed. The movement is genuine and the reopening offer significant, but the gap between the parties – and President Trump's threats – remain.

⚠ **ASSESSMENT:** A CONCRETE PATH TO A REOPENING EXISTS – BUT THE GAP AND THE THREATS PERSIST, AND THE ALERT STAYS AT MAXIMUM. The UN General Assembly has, for the first time, produced a concrete path to a reopening of the Strait: Iran's offer to reopen within seven days if the US lifts its blockade, eases military pressure, and releases frozen assets is the clearest, most specific diplomatic proposal of the war, and the first indirect US-Iran talks since June are a genuine step. If the US accepts, a reopening – and a de-escalation – could follow within days. But the alert stays at MAXIMUM, for three reasons. First, no deal was reached, and the gap remains real: the US has not agreed to lift the blockade, and President Trump accused Iran of stalling. Second, President Trump's threats – to "annihilate" Iran, to strike another nuclear site – persist, and the Gulf leaders came away divided and fearful of a US escalation. Third, the Strait remains largely closed, and nothing has changed on the water. For the UAE, the Gulf leaders' shared fear – a US strike bringing Iranian retaliation to Gulf shores – is a direct concern, and the Iran-UAE thaw a mitigating factor. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 208 – GENUINE MOVEMENT AT THE UNGA, BUT NO BREAKTHROUGH

The pivotal day of the UN General Assembly produced genuine diplomatic movement – the first indirect US-Iran talks since June, and a concrete Iranian offer to reopen the Strait – but no breakthrough or agreement, and the alert remains at MAXIMUM. US and Iranian officials held a three-hour meeting at the assembly on Tuesday, conducted indirectly through Qatari mediators – the first such talks since the June ceasefire unravelled – which President Trump described as "very good," though Iran's foreign ministry downplayed it as "not anything new," and no direct meeting between President Trump and President Pezeshkian took place. Most significantly, Iran offered to reopen the Strait of Hormuz to Gulf shipping within seven days if the United States lifts its naval blockade, eases its military pressure, and releases frozen Iranian assets – the clearest and most specific path to a reopening of the war. But no deal was reached, and the gap between the parties remained: President Trump, in his address to the assembly, accused Iran of stalling to make a deal until after the US midterm elections, threatened that he may "annihilate" Iran if a deal is not reached soon, and told the Gulf leaders the US may strike another suspected Iranian nuclear site. President Pezeshkian, in his own address, said Iran was ready for dialogue, diplomacy and negotiations but would not accept the language of force. The Iran-UAE thaw stands, and the Strait remains largely closed, with intermittent attacks continuing. 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 Wednesday 23 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. Genuine movement, but no deal. Complete departures; high readiness; suspend all Strait transits.
US-Iran talks	**FIRST SINCE JUNE.** A "very good" three-hour US-Iran meeting at the UNGA, indirect via Qatari mediators – the first since June. But indirect only; Iran downplayed it.
Iran's reopening offer	**REOPEN IN 7 DAYS – IF.** Iran offers to reopen the Strait within 7 days if the US lifts its blockade, eases military pressure, and releases frozen assets. The clearest path yet.
But no deal	**GAP REMAINS.** No agreement reached; no direct Trump-Pezeshkian meeting. Trump accuses Iran of stalling until after the midterms. The US has not agreed to lift the blockade.

Trump threats	**"ANNIHILATE"; NUCLEAR SITE.** Trump threatened to "annihilate" Iran if no deal soon, and told the Gulf leaders the US may strike another suspected Iranian nuclear site ("Pickaxe Mountain").
Gulf leaders	**DIVIDED, FEARFUL.** The Gulf leaders (incl. UAE) met Trump, sharing two fears – a US strike bringing Iranian retaliation to the Gulf, and a US withdrawal – but not remedies; no united front.
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 UNGA produced the most significant diplomatic movement of this phase – the first indirect US-Iran talks since June, and a concrete Iranian offer to reopen the Strait within seven days if the US lifts its blockade. This is the clearest path to a reopening yet, and if the US accepts, a de-escalation could follow within days. But no deal was reached, President Trump's threats persist, the Gulf leaders came away divided, and the Strait remains largely closed. The alert stays at MAXIMUM with high readiness; clients should watch closely for the US response to Iran's offer.

2. THE FIRST INDIRECT US-IRAN TALKS SINCE JUNE; IRAN'S SEVEN-DAY REOPENING OFFER – THE CLEAREST PATH YET

- **The first talks since June:** US and Iranian officials held a three-hour meeting at the UN General Assembly on Tuesday, conducted indirectly through Qatari mediators – the first talks between the two sides since the June ceasefire unravelled in July; President Trump described the meeting as "very good," though Iran's foreign ministry downplayed it, and no direct meeting between the two presidents took place.
- **Iran's seven-day reopening offer:** Most significantly, Iran offered to reopen the Strait of Hormuz to Gulf shipping within seven days if the United States lifts its naval blockade, eases its military pressure, and releases frozen Iranian assets; the offer, conveyed through mediators, is the clearest and most specific path to a reopening of the war, and sets out precisely what Iran requires.
- **A concrete path to a de-escalation:** The offer means that a reopening of the Strait – and, potentially, a broader de-escalation – could follow within days if the United States accepts Iran's terms; for the first time, there is a concrete, time-bound proposal on the table, and the question is now whether the US is willing to lift its blockade and meet Iran's conditions.
- **Iran's conditions restated:** Iran's foreign ministry spokesman restated Iran's negotiating position: the US must end its blockade of Iranian ports and release frozen Iranian assets; the talks, conducted indirectly, were described by Iran as "not anything new," and Iran maintained its long-standing demands, but the seven-day reopening offer gives those demands a concrete, actionable form.
- **Pezeshkian's opening:** President Pezeshkian, in his address to the assembly, said Iran was ready for dialogue, diplomacy and negotiations, though without accepting the language of force, and called on President Trump by name; while his address was defiant – saying Iran had not bent the knee – it kept the door to diplomacy open, consistent with the seven-day offer.

WS Assessment: The first indirect US-Iran talks since June, and Iran's concrete offer to reopen the Strait within seven days if the US lifts its blockade, are the most significant diplomatic movement of this phase and the clearest path to a reopening and a de-escalation yet. The question is now whether the US accepts; clients should watch closely for the US response, while noting no deal has yet been reached.

3. BUT NO DEAL, AND THE THREATS PERSIST – TRUMP'S "ANNIHILATE," THE NUCLEAR-SITE THREAT, THE DIVIDED GULF

- **No deal reached:** Despite the movement, no deal was reached at the assembly, and the gap between the parties remained: the United States has not agreed to lift its blockade or meet Iran's conditions, and President Trump accused Iran of stalling to make a deal to fully reopen the Strait and negotiate an endgame until after the US midterm elections in November.
- **Trump threatens to "annihilate" Iran:** In his address to the assembly, President Trump threatened that he may "annihilate" the Islamic Republic if a deal is not reached soon to end the nearly seven-month war, while defending his decision to start the war; the threat, delivered from the UN podium hours before the indirect talks, underlines that the harder tone persists alongside the diplomacy.
- **A threat to strike another nuclear site:** In his meeting with the Gulf leaders, President Trump said the US may have to strike another suspected Iranian nuclear site, referring to a facility known as Pickaxe Mountain; the threat of a strike on Iran's nuclear infrastructure raises the risk of a major escalation, and is of direct concern to the Gulf states, which fear Iranian retaliation on their shores.
- **The Gulf leaders divided and fearful:** The Gulf leaders, including the UAE, met President Trump carrying two fears – another US strike against Iran that brings missiles to Gulf shores, and a US withdrawal that leaves them facing a surviving Iran alone – but agreed on their fears more readily than on the remedies; divided by their differing economic pressures, they could not present a united front, limiting their ability to move President Trump.
- **The Strait still largely closed:** The Strait of Hormuz remains largely closed, with intermittent attacks continuing off Iran's coast and commercial shipping below pre-war levels; the diplomatic movement has not yet translated into a reopening, and the blockade persists, with the underlying reality on the water unchanged.

WS Assessment: The genuine diplomatic movement is set against a picture in which no deal was reached, President Trump's threats – to annihilate Iran, to strike another nuclear site – persist, the Gulf leaders came away divided and fearful, and the Strait remains largely closed. The path to a reopening exists, but the US has not taken it; clients should hold posture until a deal is reached and the Strait reopens.

4. THE GULF LEADERS' MEETING; THE UAE; 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 Gulf tanker war remains at a lower intensity, and the diplomatic focus has been on the UN General Assembly.
- **The Gulf leaders' shared fear a direct UAE concern:** The Gulf leaders' shared fear – that a US strike against Iran, such as the strike on a nuclear site President Trump has threatened, would bring Iranian retaliation to Gulf shores – is a direct concern for the UAE, which hosts US forces; the UAE, like its Gulf neighbours, has an interest in restraining a US escalation, and the Iran-UAE thaw is a mitigating factor.
- **The UAE's favourable threads hold:** The Iran-UAE thaw, the Houthi pledge not to target non-Saudi commercial vessels, and the UAE's Fujairah export route stand, and Iran's seven-day reopening offer, if accepted, would ease the regional picture materially; the UAE remains in a relatively favourable position, though President Trump's threats and the divided Gulf keep the danger elevated.
- **The Yemen front:** The Houthi campaign against Saudi Arabia continues, with the group having declared a blockade on Saudi shipping and struck Riyadh at the weekend; the proposed Saudi-Houthi truce, if agreed, would ease the Yemen front, but for now the second front remains active, adding to the pressure on the region.
- **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 in the event of a US strike on Iran's nuclear infrastructure. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE remains in a relatively favourable position, and Iran's reopening offer, if accepted, would ease the picture; but the Gulf leaders' shared fear of a US escalation – a strike on Iran bringing retaliation to Gulf shores – is a direct concern, and President Trump's threats keep the danger elevated. Clients should hold high readiness and watch for the US response to Iran's offer.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait largely closed, a reopening offer on the table:** The Strait of Hormuz remains largely closed, with intermittent attacks continuing and shipping below pre-war levels; but Iran's offer to reopen it within seven days if the US lifts its blockade is now on the table – the first concrete, time-bound reopening proposal of the war, which, if accepted, would transform the maritime picture.
- **Oil:** Oil, which fell more than 3% earlier in the week as Strait traffic picked up, remains historically elevated; a US acceptance of Iran's reopening offer would ease prices materially, while a US escalation – such as a strike on Iran's nuclear infrastructure – would drive them sharply higher, and the market awaits the US response.
- **Gulf producers bypassing the Strait:** Gulf producers continue to bypass the blockaded Strait – the UAE through Fujairah, Saudi Arabia through Oman's Sohar port and the recovering East-West pipeline – easing the impact of the closure, though the Strait remains the primary route and a reopening would be needed to restore normal flows.
- **The Yemen front:** The Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea and continue their campaign against Saudi Arabia; the proposed Saudi-Houthi truce, if agreed, would ease the Red Sea route, but for now the second maritime front remains disrupted.
- **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 could ease materially if the US accepts Iran's seven-day reopening offer, but for now the Strait remains largely closed and the offer unaccepted; the Yemen front remains disrupted. 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

- **Genuine movement at the UNGA – but no deal, and no confirmed strike on UAE territory.** The UNGA produced the first indirect US-Iran talks since June and Iran's offer to reopen the Strait within seven days if the US lifts its blockade – a concrete path to a de-escalation – but no deal, and President Trump threatened to strike another Iranian nuclear site. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Iran-UAE thaw and the Fujairah route keep the UAE favourably placed, but the Gulf leaders' fear of a US escalation is a direct concern.
- **COMPLETE DEPARTURES NOW – NO DEAL YET 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. No deal has been reached, the Strait remains largely closed, and President Trump's threat of a strike on Iran – which Iran warns could bring retaliation against the Gulf – cannot be discounted; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A US STRIKE ON IRAN COULD DRAW THE UAE IN.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; President Trump's threat to strike another Iranian nuclear site, and Iran's warning of retaliation against the Gulf, mean a US escalation and a strike on the Gulf 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 largely closed, though Iran's reopening offer is on the table and oil has eased. 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 LARGELY CLOSED.** Despite Iran's reopening offer, the Strait of Hormuz remains largely closed and the offer unaccepted. 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.
- **Watch for the US response to Iran's offer; build on the UAE's position.** The US response to Iran's seven-day reopening offer is the key thing to watch – an acceptance would open a path to a de-escalation within days; a rejection or a US escalation would deepen the emergency. The Iran-UAE thaw and the UAE's interest in restraining a US escalation place it well; build on both while holding posture.

Return Guidance: MAXIMUM Held, High Readiness – a Reopening Offer on the Table, No Deal Yet

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The UNGA produced genuine movement – the first indirect US-Iran talks since June, and Iran's offer to reopen the Strait within seven days if the US lifts its blockade – but no deal, and President Trump threatened to strike another Iranian nuclear site. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch for the US response to Iran's offer.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a reopening offer that the US has not accepted, with the Strait still largely closed, 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 offer will be accepted or the outcome 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 the US response to Iran's reopening offer, whether the Strait reopens, a US strike on Iran and Iran's warned retaliation against the Gulf, the Houthi campaign, the Iran-UAE thaw, 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 US acceptance of Iran's reopening offer, a reopening of the Strait, the lifting of the US blockade, a confirmed ceasefire, and a durable de-escalation with verified safe passage would allow the alert to come down. A concrete path now exists – the most promising of the war – but the US has not accepted it and the threats persist; 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 strike on Iran, including on its nuclear infrastructure, which Iran warns could bring retaliation against the Gulf, 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 – a concrete reopening offer on the table but not accepted, no deal reached, President Trump threatening a strike on Iran, the Strait still largely closed, 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 watch for the US response.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – genuine movement at the UNGA, but no deal.** The UNGA produced the first indirect US-Iran talks since June (a "very good" three-hour meeting via Qatari mediators), and Iran offered to reopen the Strait within seven days if the US lifts its blockade, eases military pressure, and releases frozen assets – the clearest path yet. But no direct Trump-Pezeshkian meeting, no deal, and President Trump threatened to "annihilate" Iran and to strike another nuclear site. The Strait stays largely closed. There is no confirmed strike on UAE territory.
- **WATCH FOR THE US RESPONSE TO IRAN'S REOPENING OFFER – THE KEY THING NOW.** Iran's offer to reopen the Strait within seven days if the US lifts its blockade is the clearest, most specific path to a de-escalation of the war; a US acceptance would open a path to a reopening within days. Watch closely for the US response.
- **BUT DO NOT YET READ THE MOVEMENT AS DE-ESCALATION.** No deal was reached, the US has not accepted Iran's offer, President Trump's threats persist, and the Strait remains largely closed. The path exists, but the US has not taken it; hold posture until a deal is reached and the Strait reopens.
- **NOTE THE THREAT OF A US STRIKE ON IRAN – A DIRECT RISK TO THE GULF.** President Trump's threat to strike another Iranian nuclear site, and Iran's warning of retaliation against the Gulf, mean a US escalation could bring Iranian retaliation to Gulf shores. The UAE shares the Gulf leaders' fear; hold high readiness against that contingency.
- **BUILD ON THE UAE'S FAVOURABLE THREADS; SUSPEND ALL STRAIT TRANSITS.** The Iran-UAE thaw, the Houthi pledge, the Fujairah route, and the UAE's interest in restraining a US escalation keep the UAE favourably placed; build on them. Suspend all transits through the Strait pending a confirmed reopening. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) the US response to Iran's seven-day reopening offer; (2) whether the Strait reopens or the US strikes Iran; (3) Iran's warned retaliation against the Gulf; (4) the Houthi campaign and the proposed Saudi-Houthi truce; (5) a rogue hardliner attack; (6) any strike on UAE territory.
- **A concrete reopening offer on the table – emergency updates to follow.** Westminster Security will issue immediate updates on the US response to Iran's offer, any reopening of the Strait, any US strike on Iran, 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 ninety-fifth edition.** Day 208 of the war.

8. KEY POINTS

- **GENUINE DIPLOMATIC MOVEMENT AT THE UNGA – THE FIRST INDIRECT US-IRAN TALKS SINCE JUNE.** US and Iranian officials held a "very good" three-hour meeting at the UN General Assembly, conducted indirectly through Qatari mediators – the first talks since the June ceasefire unravelled. No direct Trump-Pezeshkian meeting took place, and Iran downplayed the talks as "not anything new," but the movement is the most significant of this phase.
- **IRAN'S SEVEN-DAY REOPENING OFFER – THE CLEAREST PATH YET.** Iran offered to reopen the Strait of Hormuz to Gulf shipping within seven days if the US lifts its blockade, eases military pressure, and releases frozen Iranian assets – the clearest, most specific path to a reopening of the war. If the US accepts, a reopening and a de-escalation could follow within days. The question is now whether the US is willing to lift its blockade.
- **BUT NO DEAL, AND THE THREATS PERSIST.** No deal was reached, and the gap remained: President Trump accused Iran of stalling until after the US midterms, threatened to "annihilate" Iran, and told the Gulf leaders the US may strike another suspected Iranian nuclear site. President Pezeshkian said Iran was ready for dialogue but would not accept the language of force. The path exists, but the US has not taken it.
- **THE GULF LEADERS DIVIDED AND FEARFUL – A DIRECT UAE CONCERN.** The Gulf leaders, including the UAE, met President Trump carrying two fears – a US strike bringing Iranian retaliation to Gulf shores, and a US withdrawal – but agreed on their fears more than on the remedies and could not present a united front. The shared fear of a US escalation is a direct concern for the UAE; the Iran-UAE thaw is a mitigating factor.
- **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 Iran-UAE thaw, the Houthi pledge sparing UAE shipping, and the Fujairah route keep the UAE in a relatively favourable position, and Iran's reopening offer, if accepted, would ease the picture. But President Trump's threat of a strike on Iran keeps the danger elevated. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-FIFTH EDITION. DAY 208.** The UNGA produced genuine movement – the first indirect US-Iran talks since June, and Iran's concrete offer to reopen the Strait within seven days if the US lifts its blockade – but no deal, and President Trump threatened a strike on Iran; the Strait remains largely closed 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 watch for the US response to Iran's offer. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 23rd September 2026 – Information current as of 09:00 GMT

THE PIVOTAL UN GENERAL ASSEMBLY DAY PRODUCED GENUINE DIPLOMATIC MOVEMENT – THE FIRST INDIRECT US-IRAN TALKS SINCE JUNE (A "VERY GOOD" THREE-HOUR MEETING VIA QATARI MEDIATORS) – AND, MOST SIGNIFICANTLY, IRAN OFFERED TO REOPEN THE STRAIT WITHIN SEVEN DAYS IF THE US LIFTS ITS BLOCKADE, EASES MILITARY PRESSURE, AND RELEASES FROZEN ASSETS – THE CLEAREST PATH TO A REOPENING AND A DE-ESCALATION OF THE WAR. THE US RESPONSE IS NOW THE KEY THING TO WATCH.

BUT NO BREAKTHROUGH WAS REACHED: NO DIRECT TRUMP-PEZESHKIAN MEETING, NO DEAL, AND THE GAP REMAINS – THE US HAS NOT AGREED TO LIFT THE BLOCKADE, PRESIDENT TRUMP ACCUSED IRAN OF STALLING UNTIL AFTER THE MIDTERMS, THREATENED TO "ANNIHILATE" IRAN, AND TOLD THE GULF LEADERS THE US MAY STRIKE ANOTHER IRANIAN NUCLEAR SITE. THE STRAIT REMAINS LARGELY CLOSED. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE; THE IRAN-UAE THAW STANDS. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE

DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH FOR THE US RESPONSE TO IRAN'S SEVEN-DAY REOPENING OFFER – THE KEY THING NOW – BUT DO NOT YET READ THE MOVEMENT AS DE-ESCALATION; NOTE THE THREAT OF A US STRIKE ON IRAN AS A DIRECT RISK TO THE GULF; AND BUILD ON THE UAE'S FAVOURABLE POSITION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETY-FIFTH EDITION. DAY 208.