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DAY 209 – THE DIPLOMATIC MOVEMENT STALLS ON A SEQUENCING IMPASSE: IRAN HAS PRESENTED A FULLER ROAD MAP – A REGIONWIDE CEASEFIRE OF UP TO 60 DAYS, A PHASED STRAIT REOPENING, AND AN END TO THE BLOCKADE – BUT TRUMP HAS RULED OUT LIFTING THE BLOCKADE BEFORE IRAN DEMONSTRATES GOODWILL, AND SAYS A DEAL COULD COME AFTER THE MIDTERMS. NEITHER SIDE WILL MOVE FIRST. THE DOOR REMAINS OPEN (MEDIATION BROADENS TO QATAR, PAKISTAN, EGYPT). THE STRAIT STAYS LARGELY CLOSED; NETANYAHU ADDRESSES THE UNGA TODAY. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

24 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE GENUINE DIPLOMATIC MOVEMENT OF THE UN GENERAL ASSEMBLY HAS STALLED ON A SEQUENCING IMPASSE, WITH NEITHER SIDE WILLING TO MOVE FIRST; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. Iran has presented the United States, through mediators, with a fuller road map – a regionwide ceasefire of up to 60 days, a phased reopening of the Strait of Hormuz, and an end to the US blockade – the most detailed proposal of the war, and has said there is a possibility of moving toward an agreement. But President Trump has ruled out lifting the blockade before Iran demonstrates sufficient goodwill, framed the choice as one between a deal and further military action, and said a deal could come only after the US midterm elections; Iran, for its part, insists the blockade be lifted first. The result is a standoff: Iran will reopen the Strait within days if the US lifts the blockade, but the US will not lift the blockade until Iran demonstrates goodwill. The mediation has broadened to Qatar, Pakistan and Egypt, and the door remains open, but no deal has been reached. The Strait remains largely closed, and Netanyahu addresses the assembly today. 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:** THE DOOR REMAINS OPEN – BUT THE SEQUENCING IMPASSE BLOCKS THE PATH. The diplomacy is genuinely alive, but blocked on the question of who moves first. On the open side: Iran has presented a fuller road map – a regionwide ceasefire of up to 60 days, a phased Strait reopening, and an end to the blockade – the most detailed proposal of the war; both sides say there is a possibility of an agreement; the mediation has broadened to Qatar, Pakistan and Egypt; and the Iran-UAE thaw and the easing threads continue. On the blocked side: President Trump has ruled out lifting the blockade before Iran demonstrates goodwill, and says a deal could come only after the midterms, while Iran insists the blockade be lifted first – a sequencing standoff that neither side has yet bridged; President Trump's threats persist; and the Strait remains largely closed. A concrete path

to a de-escalation exists, but the impasse over sequencing – and the US insistence on Iranian goodwill first – blocks it for now.

⚠ **ASSESSMENT:** THE PATH EXISTS BUT IS BLOCKED – THE US WILL NOT MOVE FIRST, AND THE ALERT STAYS AT MAXIMUM. The diplomacy has produced a concrete, detailed path to a de-escalation – Iran's road map of a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – but it is blocked by a sequencing impasse: Iran will reopen the Strait if the US lifts the blockade first, and the US will not lift the blockade until Iran demonstrates goodwill first. This is a genuine, and potentially bridgeable, impasse – mediators could construct a sequence of reciprocal, simultaneous steps – but neither side has yet bridged it, and President Trump's suggestion that a deal could wait until after the midterms indicates the US is in no hurry. The alert stays at MAXIMUM: no deal has been reached, the Strait remains largely closed, President Trump's threats persist, and the war continues. For the UAE, a de-escalation would ease the picture materially, and the Iran-UAE thaw is favourable; but the impasse, and the risk of a US escalation, keep the danger elevated. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 209 – THE MOVEMENT STALLS ON A SEQUENCING IMPASSE

The genuine diplomatic movement of the UN General Assembly has stalled on a sequencing impasse, with neither side willing to move first, though the door remains open; the Strait remains largely closed and the alert remains at MAXIMUM. Iran has presented the United States, through mediators, with a fuller road map to end the war: a regionwide ceasefire of up to 60 days, a phased reopening of the Strait of Hormuz, and an end to the US naval blockade, with Iran's conditions including a halt to what it calls US acts of aggression, an end to the blockade and economic warfare, and the release of frozen Iranian assets. It is the most detailed proposal of the war, and Iran has said there is a possibility of moving toward an agreement if Washington demonstrates seriousness and commitment. But President Trump has ruled out lifting the blockade before Iran demonstrates sufficient goodwill, framed the choice facing Washington as one between a deal and further military action, and suggested a deal could come only after the US midterm elections in November; Iran, for its part, insists the blockade be lifted first. The result is a sequencing standoff: Iran will reopen the Strait within days if the US lifts the blockade, but the US will not lift the blockade until Iran demonstrates goodwill, and neither side has yet bridged the gap. The mediation has broadened to Qatar, Pakistan and Egypt, and the Iran-UAE thaw and the easing threads continue; but the Strait remains largely closed, and Israel's Prime Minister Netanyahu is due to address the assembly today. There is no confirmed strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Thursday 24 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The movement stalls on a sequencing impasse. Complete departures; high readiness; suspend all Strait transits.
Iran's road map	**CEASEFIRE, PHASED REOPENING.** Iran proposes a regionwide ceasefire of up to 60 days, a phased Strait reopening, and an end to the blockade – the most detailed proposal of the war.
US response	**NO BLOCKADE LIFT FIRST.** Trump has ruled out lifting the blockade before Iran shows goodwill; says a deal could come only after the midterms; frames it as a deal or "further military action."
The impasse	**SEQUENCING STANDOFF.** Iran will reopen if the US lifts the blockade first; the US will not lift it until Iran shows goodwill first. Neither will move first.

Mediation	**BROADENS.** The mediation has broadened to Qatar, Pakistan and Egypt; both sides say there is a possibility of an agreement. The door remains open.
UNGA / Israel	Pezeshkian addressed the assembly Wednesday; Netanyahu addresses it today. Iran dismisses Trump's threats as "strategic desperation."
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: A concrete, detailed path to a de-escalation now exists – Iran's road map of a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – but it is blocked by a sequencing impasse, with neither side willing to move first and President Trump signalling a deal could wait until after the midterms. The door remains open, and mediators could bridge the gap; but no deal has been reached, and the alert stays at MAXIMUM with high readiness. Clients should watch whether the mediators bridge the impasse.

2. IRAN'S FULLER ROAD MAP – A 60-DAY CEASEFIRE, A PHASED REOPENING, AN END TO THE BLOCKADE

- **The road map:** Iran has presented the United States, through mediators, with a fuller road map to end the war: a regionwide ceasefire of up to 60 days, a phased reopening of the Strait of Hormuz, and an end to the US naval blockade; it is the most detailed proposal of the war, and moves beyond the earlier seven-day reopening offer to set out a broader framework for ending hostilities.
- **Iran's conditions:** Iran's conditions, conveyed through the Qatari mediator and restated by its foreign ministry, include a halt to what Iran calls US acts of aggression, an end to the naval blockade and economic warfare, and the release of frozen Iranian assets; Iran has also linked a permanent settlement to the termination of the war on all fronts, consistent with its long-standing position.
- **A phased reopening:** The proposal envisages a phased reopening of the Strait, restoring traffic through a waterway that carried about a fifth of global oil and gas shipments before the war, followed by negotiations aimed at a permanent end to hostilities; it offers a structured, staged path to a reopening and a de-escalation, rather than an immediate, unconditional one.
- **A possibility of an agreement:** Iran has said there is a possibility of moving toward an agreement, while insisting that Washington demonstrate seriousness and commitment for the diplomacy to advance; the presentation of a detailed road map, and the openness to an agreement, indicate that Iran is seeking a negotiated end to the war, albeit on its terms.
- **The mediation broadens:** The talks at the assembly were mediated by Qatar, Pakistan and Egypt, a broadening of the mediation, and Iran plans to consult the intermediary nations to advance negotiations; the involvement of multiple mediators increases the diplomatic weight behind the effort, and the door to a negotiated settlement remains open.

WS Assessment: Iran's fuller road map – a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – is the most detailed and structured path to a de-escalation of the war, and the broadened mediation keeps the door open. But it is a proposal, not an agreement, and its realisation depends on bridging the impasse over sequencing; clients should watch the mediation closely.

3. BUT TRUMP RULES OUT LIFTING THE BLOCKADE FIRST – THE SEQUENCING IMPASSE

- **Trump rules out lifting the blockade first:** President Trump has ruled out lifting the US naval blockade before Iran demonstrates sufficient goodwill; the US position is that Iran must take steps first to show it is serious, and only then will the US consider easing its pressure – the reverse of Iran's position, which is that the blockade must be lifted before it reopens the Strait.
- **A deal or further military action:** President Trump has framed the choice facing Washington as one between a deal with Iran and further military action, and continues to threaten a strike, including on Iran's nuclear infrastructure; the framing maintains maximum pressure, and signals that the US is prepared to escalate if it judges the diplomacy to be failing.
- **A deal after the midterms:** President Trump has suggested that a deal could come only after the US midterm elections in November, and has accused Iran of stalling to delay a settlement until then; the suggestion indicates the US is in no hurry to reach a deal, and that a near-term de-escalation may not be Washington's priority.
- **The sequencing standoff:** The result is a sequencing standoff: Iran will reopen the Strait within days if the US lifts the blockade first, but the US will not lift the blockade until Iran demonstrates goodwill first, and neither side has yet moved. The impasse is genuine, but potentially bridgeable – mediators could construct a sequence of reciprocal, simultaneous steps – and the door remains open.
- **Iran dismisses the threats:** Iran has dismissed President Trump's threats as a sign of strategic desperation, and its Revolutionary Guard has warned it will expand the geography of the war if the US attacks again, saying it has prepared for a long-term war; the hardening rhetoric on both sides sits alongside the diplomatic effort, and the risk of a US escalation, and an Iranian response, persists.

WS Assessment: The sequencing impasse – Iran insisting the blockade be lifted first, the US insisting on Iranian goodwill first – blocks the concrete path to a de-escalation for now, and President Trump's suggestion that a deal could wait until after the midterms indicates the US is in no hurry. The impasse is potentially bridgeable, but neither side has yet moved; clients should watch the mediation while holding posture.

4. THE UAE; THE REGIONAL PICTURE; NETANYAHU AT THE UNGA

- **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.
- **A de-escalation would ease the UAE's picture:** Iran's road map, if realised, would ease the UAE's picture materially – a regionwide ceasefire, a reopening of the Strait, and an end to the blockade would restore the region's shipping and lift the pressure on oil; the UAE, like its Gulf neighbours, has a strong interest in the mediators bridging the impasse and securing a de-escalation.
- **But the risk of a US escalation persists:** President Trump's framing of the choice as one between a deal and further military action, and his threat to strike Iran's nuclear infrastructure, mean the risk of a US escalation persists; Iran's warning that it will expand the geography of the war if attacked is a reminder that a US strike could bring Iranian retaliation to the Gulf, including the UAE, notwithstanding the Iran-UAE thaw.
- **Netanyahu at the UNGA:** Israel's Prime Minister Netanyahu is due to address the UN General Assembly today; his address, following those of President Trump and President Pezeshkian, will be watched for Israel's stance on the war and on Iran, and could affect the diplomatic climate, given Israel's role in the conflict alongside the US.
- **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. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE has a strong interest in a de-escalation, which Iran's road map, if realised, would deliver; but the sequencing impasse blocks it for now, and the risk of a US escalation – which could bring Iranian retaliation to the Gulf – persists. Clients should hold high readiness, watch the mediation and Netanyahu's address, and protect energy resilience.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait largely closed, a road map on the table:** The Strait of Hormuz remains largely closed, with the blockade persisting and shipping below pre-war levels; but Iran's road map – a phased reopening as part of a regionwide ceasefire – is on the table, and would, if realised, restore traffic through the waterway that carried about a fifth of global oil and gas shipments before the war.
- **Oil:** Oil, which eased earlier in the week as Strait traffic picked up, remains historically elevated; a bridging of the impasse and a phased reopening 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 outcome of the diplomacy.
- **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 Houthi campaign against Saudi Arabia continues, with the group having declared a blockade on Saudi shipping and struck Riyadh; the proposed Saudi-Houthi truce, and Iran's regionwide ceasefire road map, if realised, would ease the Yemen front, 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 mediators bridge the impasse and Iran's phased reopening proceeds, but for now the Strait remains largely closed and the impasse unresolved; 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

- **A road map on the table, but blocked – and no confirmed strike on UAE territory.** Iran's road map – a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – offers a concrete path to a de-escalation, but it is blocked by a sequencing impasse, and President Trump continues to threaten a strike on Iran. 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 risk of a US escalation persists.
- **COMPLETE DEPARTURES NOW – THE IMPASSE PERSISTS 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 impasse persists, the Strait remains largely closed, and President Trump's threat of a strike on Iran – which Iran warns could expand the war to 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 Iran, and Iran's warning that it will expand the geography of the war if attacked, 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 road map 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 road map, the Strait of Hormuz remains largely closed and the impasse unresolved. 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 whether the mediators bridge the impasse; build on the UAE's position.** Whether the mediators – Qatar, Pakistan and Egypt – can bridge the sequencing impasse is the key thing to watch; a bridging would open a path to a phased reopening and a de-escalation. 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 Road Map Blocked by a Sequencing Impasse

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. Iran's road map – a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – offers a concrete path to a de-escalation, but it is blocked by a sequencing impasse, and President Trump continues to threaten a strike on Iran. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch whether the mediators bridge the impasse.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a road map blocked by an impasse, 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 impasse will be bridged 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 whether the mediators bridge the impasse, whether the Strait reopens, a US strike on

Iran and Iran's warned expansion of the war, Netanyahu's address, 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 bridging of the sequencing impasse, a phased 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 exists – the most detailed of the war – but it is blocked for now, and the US is in no hurry; 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 would expand the war to 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 road map on the table but blocked by a sequencing impasse, 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 the mediation.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the movement stalls on a sequencing impasse.** Iran has presented a fuller road map – a regionwide ceasefire of up to 60 days, a phased Strait reopening, and an end to the blockade – the most detailed proposal of the war. But President Trump has ruled out lifting the blockade before Iran demonstrates goodwill, and says a deal could come only after the midterms; Iran insists the blockade be lifted first. Neither side will move first. The Strait stays largely closed. There is no confirmed strike on UAE territory.
- **WATCH WHETHER THE MEDIATORS BRIDGE THE IMPASSE – THE KEY THING NOW.** Whether the mediators – Qatar, Pakistan and Egypt – can bridge the sequencing standoff, perhaps through reciprocal, simultaneous steps, is the key thing to watch; a bridging would open a path to a phased reopening and a de-escalation. Watch the mediation closely.
- **BUT DO NOT YET READ THE ROAD MAP AS DE-ESCALATION.** The road map is a proposal, not an agreement; the impasse is unresolved, the US is in no hurry, President Trump's threats persist, and the Strait remains largely closed. The path exists, but it is blocked; hold posture until the impasse is bridged and the Strait reopens.
- **NOTE THE THREAT OF A US STRIKE ON IRAN – A DIRECT RISK TO THE GULF.** President Trump's framing of the choice as a deal or further military action, and his threat to strike Iran's nuclear infrastructure, mean a US escalation could bring Iranian retaliation to the Gulf. Iran warns it will expand the war if attacked; hold high readiness against that contingency.
- **BUILD ON THE UAE'S FAVOURABLE THREADS; SUSPEND ALL STRAIT TRANSITS.** The Iran-UAE thaw, the Fujairah route, and the UAE's interest in a de-escalation and 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) whether the mediators bridge the sequencing impasse; (2) whether the Strait reopens or the US strikes Iran; (3) Iran's warned expansion of the war to the Gulf; (4) Netanyahu's UNGA address and the Houthi campaign; (5) a rogue hardliner attack; (6) any strike on UAE territory.
- **A road map blocked by an impasse – emergency updates to follow.** Westminster Security will issue immediate updates on any bridging of the impasse, 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-sixth edition.** Day 209 of the war.

8. KEY POINTS

- **IRAN PRESENTS A FULLER ROAD MAP – A CEASEFIRE, A PHASED REOPENING, AN END TO THE BLOCKADE.** Iran has presented the US, through mediators, with a road map to end the war: a regionwide ceasefire of up to 60 days, a phased reopening of the Strait of Hormuz, and an end to the US blockade – the most detailed proposal of the war. Iran says there is a possibility of an agreement if Washington shows seriousness. The mediation has broadened to Qatar, Pakistan and Egypt.
- **BUT TRUMP RULES OUT LIFTING THE BLOCKADE FIRST – A SEQUENCING IMPASSE.** President Trump has ruled out lifting the blockade before Iran demonstrates goodwill, framed the choice as a deal or further military action, and suggested a deal could come only after the midterms; Iran insists the blockade be lifted first. The result is a sequencing standoff – Iran will reopen if the US lifts the blockade first, the US will not lift it until Iran shows goodwill first – and neither side has yet moved.
- **THE PATH EXISTS BUT IS BLOCKED – POTENTIALLY BRIDGEABLE.** A concrete, detailed path to a de-escalation now exists, but it is blocked by the impasse over sequencing. The impasse is potentially bridgeable – mediators could construct a sequence of reciprocal, simultaneous steps – and the door remains open; but neither side has yet bridged it, and President Trump's suggestion that a deal could wait until after the midterms indicates the US is in no hurry.
- **THE RISK OF A US ESCALATION PERSISTS – A DIRECT RISK TO THE GULF.** President Trump continues to threaten a strike on Iran, including on its nuclear infrastructure, and to frame the choice as a deal or further military action; Iran warns it will expand the geography of the war if attacked. A US strike could bring Iranian retaliation to the Gulf, including the UAE. The Iran-UAE thaw is a mitigating factor, but readiness must be maintained. Netanyahu addresses the UNGA today.
- **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 road map, if realised, would ease the picture. But the risk of a US escalation keeps the danger elevated. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-SIXTH EDITION. DAY 209.** The genuine diplomatic movement has stalled on a sequencing impasse – a concrete road map on the table but blocked, with neither side willing to move first – and President Trump threatens 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 whether the mediators bridge the impasse. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 24th September 2026 – Information current as of 09:00 GMT

THE GENUINE DIPLOMATIC MOVEMENT OF THE UN GENERAL ASSEMBLY HAS STALLED ON A SEQUENCING IMPASSE. IRAN HAS PRESENTED A FULLER ROAD MAP – A REGIONWIDE CEASEFIRE OF UP TO 60 DAYS, A PHASED REOPENING OF THE STRAIT, AND AN END TO THE BLOCKADE – THE MOST DETAILED PROPOSAL OF THE WAR, AND SAYS THERE IS A POSSIBILITY OF AN AGREEMENT. BUT PRESIDENT TRUMP HAS RULED OUT LIFTING THE BLOCKADE BEFORE IRAN DEMONSTRATES GOODWILL, AND SAYS A DEAL COULD COME ONLY AFTER THE MIDTERMS; IRAN INSISTS THE BLOCKADE BE LIFTED FIRST. NEITHER SIDE WILL MOVE FIRST.

THE PATH EXISTS BUT IS BLOCKED – POTENTIALLY BRIDGEABLE BY THE MEDIATORS (NOW QATAR, PAKISTAN AND EGYPT), THE KEY THING TO WATCH. BUT NO DEAL HAS BEEN REACHED, THE US IS IN NO HURRY, PRESIDENT TRUMP CONTINUES TO THREATEN A

STRIKE ON IRAN (A DIRECT RISK TO THE GULF), AND 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 WHETHER THE MEDIATORS BRIDGE THE SEQUENCING IMPASSE – THE KEY THING NOW – BUT DO NOT YET READ THE ROAD MAP 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-SIXTH EDITION. DAY 209.