WESTMINSTER SECURITY

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UAE SITREP DOCUMENT

DAY 210 – IRAN HARDENS AND WIDENS ITS THREATS AS THE IMPASSE PERSISTS: A SUPREME-LEADER ADVISER (SAFAVI) WARNS FURTHER US/ISRAELI ATTACKS COULD EXPAND THE WAR TO THE RED SEA, BAB EL-MANDEB AND "THE INDIAN OCEAN AND PERHAPS BEYOND" (THE FIRST SUCH THREAT, IMPLICITLY POINTING AT DIEGO GARCIA), AND REZAEI THREATENS GULF AIRPORTS IF THEY COOPERATE IN THE AVIATION DENIAL CAMPAIGN – A DIRECT CONCERN FOR THE UAE. IRAN TOUGHENS ITS CONDITIONS; THE SEQUENCING IMPASSE PERSISTS (WITKOFF TALKS "PROMISING" BUT NO BREAKTHROUGH). THE STRAIT STAYS LARGELY CLOSED – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

25 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE SEQUENCING IMPASSE IN THE DIPLOMACY PERSISTS, AND IRAN HAS HARDENED ITS POSITION AND WIDENED ITS THREATS – INCLUDING, FOR THE FIRST TIME, TO THE INDIAN OCEAN, AND TO GULF AIRPORTS; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. A military adviser to Iran's Supreme Leader, Major General Rahim Safavi, has warned that any further US or Israeli attacks could expand the war from the Gulf and the Strait to the Red Sea and the Bab el-Mandeb and, in a first, "to the Indian Ocean and perhaps beyond" – a threat that implicitly points at the US-UK base at Diego Garcia. Separately, Iran has threatened that the airports of neighbouring Gulf states could be made unable to function if those states cooperate in the campaign to deny Iran its own aviation – the first Iranian threat directed at Gulf civil infrastructure, and a direct concern for the UAE. Iran has toughened its conditions, saying the Strait will stay closed unless its terms are met, even as its foreign minister met the US envoy indirectly through Qatari mediators, in talks the US called "promising" but which produced no breakthrough. The sequencing impasse – Iran insisting the blockade be lifted first, the US insisting on Iranian goodwill first – persists. 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 DIPLOMACY IS ALIVE, BUT IRAN HAS HARDENED AND WIDENED ITS THREATS. The diplomacy remains technically alive, but the picture has hardened. On the diplomatic side: the indirect talks continue – Iran's foreign minister met the US envoy through Qatari mediators, in talks the US called "promising" and "constructive" – and Iran's road map, with its regionwide ceasefire and phased Strait reopening, remains on the table. On the harder side: the sequencing impasse persists, with neither side moving first and the US saying a deal would require "hard work over time"; Iran has toughened its conditions, saying the Strait will stay closed unless its terms are met; and, most significantly, Iran has widened its threats – warning it could expand the war to the

Indian Ocean, and threatening Gulf airports if the Gulf states cooperate against it. Iranian hardliners have criticised even the indirect contact with the US. The net picture is of a diplomacy that is alive but stalled, with Iran hardening its stance and widening the potential theatre of the war.

⚠ **ASSESSMENT:** IRAN'S WIDENING THREATS RAISE THE STAKES – INCLUDING FOR THE UAE, WHOSE AIRPORTS ARE NOW NAMED. Iran's hardening and the widening of its threats are the significant developments of the day, and they raise the stakes of a US escalation. The Indian Ocean threat, while rhetorical and without a specific operational plan, extends the declared theatre of the war for the first time beyond the Gulf, the Strait and the Red Sea, and points implicitly at Diego Garcia; it is a signal that further US pressure could carry risks far beyond Hormuz. More directly for the UAE, Iran's threat to render Gulf airports unable to function if the Gulf states cooperate in the aviation denial campaign is the first Iranian threat aimed at Gulf civil infrastructure, and names the very airports – Dubai, Abu Dhabi – on which the UAE's economy and connectivity depend. The threat is conditional on cooperation against Iran, and the Iran-UAE thaw is a mitigating factor that may keep the UAE off Iran's target list; but it cannot be discounted. The sequencing impasse persists, no deal has been reached, and the Strait remains largely closed. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 210 – IRAN HARDENS AND WIDENS ITS THREATS; THE IMPASSE PERSISTS

The sequencing impasse in the diplomacy persists, and Iran has hardened its position and widened its threats – including, for the first time, to the Indian Ocean, and to the airports of the Gulf states; the Strait remains largely closed and the alert remains at MAXIMUM. A military adviser to Iran's Supreme Leader, Major General Yahya Rahim Safavi, has warned that any further US or Israeli attacks could expand the war from the Gulf and the Strait of Hormuz to the Red Sea and the Bab el-Mandeb and, in a first for a supreme-leader adviser, reach "the Indian Ocean and perhaps beyond" – a threat that, while rhetorical and without a stated operational plan, points implicitly at the US-UK military base at Diego Garcia. Separately, Iran has threatened that the airports of neighbouring Gulf states could be rendered unable to function if those states cooperate in the campaign to deny Iran the use of its own aviation – the first Iranian threat directed at Gulf civil infrastructure, and a direct concern for the UAE, whose economy depends on its airports. Iran has also toughened its conditions, its security chief Rezaei saying the Strait will stay closed and negotiations will not proceed unless its terms are met, and its Revolutionary Guard claiming Iran has won the war. This came even as Iran's foreign minister, Araghchi, met the US envoy, Witkoff, indirectly through Qatari mediators to convey Iran's conditions, in talks the US described as promising and constructive but which produced no breakthrough – and which Iranian hardliners criticised. The sequencing impasse – Iran insisting the blockade be lifted first, the US insisting on Iranian goodwill first – persists, and Israel's Prime Minister Netanyahu has addressed the assembly. 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 with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Friday 25 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. Iran hardens and widens its threats; the impasse persists. Complete departures; high readiness; suspend all Strait transits.
Indian Ocean threat	**A FIRST.** A supreme-leader adviser (Safavi) warns further US/Israeli attacks could expand the war to the Red Sea, Bab el-Mandeb and "the Indian Ocean and perhaps beyond" – implicitly Diego Garcia. Rhetorical; no stated plan.
Gulf airports threat	**A DIRECT UAE CONCERN.** Iran (Rezaei) threatens Gulf airports could be made unable to function if the Gulf states cooperate in the

	aviation denial campaign – the first threat to Gulf civil infrastructure. Conditional.
Iran's stance	**TOUGHENED.** Iran says the Strait stays closed unless its terms are met, and claims it has "won the war." Hardliners criticise the indirect US contact.
Diplomacy	**ALIVE BUT STALLED.** Araghchi met Witkoff indirectly (via Qatar); the US called it "promising," but Rubio said a deal needs "hard work over time." No breakthrough. The impasse persists.
Strait / oil	The Strait remains largely closed (~3M bpd via alternative routes, vs ~20M pre-war). Oil elevated. Netanyahu addressed the UNGA.
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: Iran has hardened its position and widened its threats – to the Indian Ocean, and, of direct concern to the UAE, to Gulf airports – even as the indirect diplomacy continues but stalls on the sequencing impasse. The threats are rhetorical and conditional, and the Iran-UAE thaw may keep the UAE off Iran's target list; but they raise the stakes of a US escalation. The alert stays at MAXIMUM with high readiness; clients should note the airports threat and watch whether the mediators bridge the impasse.

2. THE SEQUENCING IMPASSE PERSISTS; IRAN HARDENS ITS POSITION

- **The impasse persists:** The sequencing impasse in the diplomacy persists: Iran insists the US lift its blockade before it reopens the Strait, and the US insists Iran demonstrate goodwill before it eases its pressure, and neither side has moved. Iran's road map – a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – remains on the table, but has not been bridged with the US position.
- **Iran toughens its conditions:** Iran has toughened its conditions: its security chief, Rezaei, has said the Strait will stay closed, and negotiations will not proceed on any other basis, unless Iran's terms are met – a harder line than the road map's provision for negotiations to run while a ceasefire is in force; and the Revolutionary Guard has claimed that Iran has won the war and is consolidating its victory into a deterrent force.
- **The indirect talks continue:** Iran's foreign minister, Araghchi, met the US envoy, Witkoff, indirectly through Qatari mediators at the assembly, to convey Iran's conditions – an end to the war on all fronts, a halt to US military operations, an end to the blockade and economic war, and the release of Iranian assets; the US described the talks as promising and constructive, though Secretary of State Rubio said a deal would require hard work over time, and no breakthrough was reached.
- **Hardliners criticise the contact:** The indirect contact with the US prompted strong criticism of Araghchi from hardline and Revolutionary Guard-affiliated media in Iran; the criticism, alongside Iran's toughened conditions and its claim to have won the war, indicates that Iran's hardliners are resistant to concessions, and that the diplomacy faces internal opposition in Tehran.
- **Netanyahu at the UNGA:** Israel's Prime Minister Netanyahu has addressed the UN General Assembly, following the addresses of President Trump and President Pezeshkian; Israel's role in the war alongside the US, and its stance on Iran, remain a factor in the diplomacy, and the risk of an Israeli, as well as a US, strike on Iran persists.

WS Assessment: The diplomacy is alive but stalled: the indirect talks continue, but the sequencing impasse persists, Iran has toughened its conditions, and Iranian hardliners are resistant. The path to a de-escalation exists but is blocked, and the US is in no hurry; clients should watch whether the mediators can bridge the impasse.

3. IRAN WIDENS ITS THREATS – TO THE INDIAN OCEAN, AND TO GULF AIRPORTS

- **The Indian Ocean threat:** A military adviser to Iran's Supreme Leader, Major General Yahya Rahim Safavi, has warned that any further US or Israeli attacks could expand the war from the Gulf and the Strait of Hormuz to the Red Sea and the Bab el-Mandeb and, in his words, reach "the Indian Ocean and perhaps beyond"; it is the first time an adviser to Iran's Supreme Leader has explicitly raised the Indian Ocean as a heightened military threat.
- **Implicitly Diego Garcia:** The Indian Ocean threat points implicitly at the strategic British military base at Diego Garcia, heavily used by the United States, which lies deep in the Indian Ocean some 2,400 miles from Iran; in the early days of the war, the US accused Iran of launching missiles toward Diego Garcia, an accusation Iran denied, and the base is the most likely Iranian target in the Indian Ocean.
- **Rhetorical, for now:** The Indian Ocean threat is, for now, at the level of rhetoric and signalling: none of Iran's statements sets out a specific plan for operations there, and Iran's ability to strike targets in the Indian Ocean is limited. But, combined with its threats against regional airports and its references to the Bab el-Mandeb, it is an increasingly explicit message that further US pressure could carry risks well beyond the Strait of Hormuz.
- **The threat to Gulf airports:** More directly for the UAE, Iran has threatened that the airports of neighbouring Gulf states could be rendered unable to function if those states cooperate in the campaign to deny Iran the use of its own aviation; it is the first Iranian threat directed at Gulf civil infrastructure as retaliation, and it names, in effect, the airports – Dubai, Abu Dhabi – on which the UAE's economy and global connectivity depend. Iran has already, during the war, repeatedly struck Kuwait International Airport.
- **Conditional, but a caution:** The threat to Gulf airports is conditional on the Gulf states cooperating against Iran, and the Iran-UAE thaw is a mitigating factor that may keep the UAE off Iran's target list; but a threat to render UAE airports unable to function, from a party that has struck Kuwait's airport, cannot be discounted, and marks a widening of the risk to the UAE's civil infrastructure.

WS Assessment: Iran's widening of its threats – to the Indian Ocean, and to Gulf airports – raises the stakes of a US escalation. For the UAE, the threat to Gulf airports is the more significant, naming the infrastructure on which its economy depends; while it is conditional and the thaw is a mitigating factor, clients should note it, and hold high readiness, particularly against the risk of a US escalation that could trigger Iranian retaliation.

4. THE UAE; THE GULF AIRPORTS THREAT; 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 airports threat a direct concern:** Iran's threat to render Gulf airports unable to function if the Gulf states cooperate against it is a direct concern for the UAE: Dubai and Abu Dhabi airports are among the world's busiest and are central to the UAE's economy and connectivity, and a threat to them, from a party that has struck Kuwait's airport, is significant, even if conditional and mitigated by the Iran-UAE thaw.
- **The UAE's pragmatic posture a shield:** The Iran-UAE thaw and the UAE's pragmatic, de-escalatory posture may shield it from Iran's threats: Iran's threat to Gulf airports is conditioned on cooperation in the aviation denial campaign against it, and the UAE, which maintains communication with Iran, is less likely to be seen as cooperating; but the UAE should avoid actions that Iran could construe as cooperation, and hold readiness against the contingency.
- **The risk of a US escalation persists:** President Trump's threat to strike Iran, including its nuclear infrastructure, and Iran's warning that it will widen the war – to the Indian Ocean, and against Gulf airports – if attacked, mean the risk of a US escalation, and of Iranian retaliation reaching the UAE, persists; a US strike is the principal trigger for an escalation that could draw the UAE in.
- **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 against their airports, in the event of a US strike. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE has not been struck, and its pragmatic posture and thaw with Iran may shield it from Iran's threats; but Iran's threat to Gulf airports names the UAE's critical civil infrastructure, and the risk of a US escalation triggering Iranian retaliation persists. Clients should hold high readiness, note the airports threat, and watch the diplomacy and the risk of a US strike.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait largely closed:** The Strait of Hormuz remains largely closed, with about three million barrels a day now moving through alternative routes, against some twenty million barrels a day before the war; Iran has hardened its stance, saying the Strait will stay closed unless its terms are met, and the road map's phased reopening has not begun.
- **Oil elevated:** Oil remains historically elevated, having risen as Iran vowed it would not surrender and widened its threats; a bridging of the impasse and a phased reopening would ease prices, while a US escalation – which Iran warns could widen the war to the Indian Ocean and against Gulf airports – would drive them sharply higher.
- **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 – with the US moving oil through alternative routes; but the Strait remains the primary route, and its closure keeps the volume far below the pre-war norm.
- **The Yemen and aviation fronts:** The Houthi campaign against Saudi Arabia continues, and Iran's threat to the Bab el-Mandeb and, now, the Indian Ocean, extends the maritime risk; Iran's threat to Gulf airports extends the risk to aviation. The regional picture is one of a widening potential theatre, even as the diplomacy continues.
- **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 Strait remains largely closed, oil elevated, and Iran has widened the potential theatre of the war to the Indian Ocean and to Gulf aviation; the diplomacy continues but is stalled. 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

- **Iran widens its threats – including to Gulf airports – but no confirmed strike on UAE territory.** Iran has widened its threats to the Indian Ocean and, of direct concern to the UAE, to Gulf airports if the Gulf states cooperate against it; the impasse persists and the Strait remains largely closed. 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 UAE's pragmatic posture may shield it, but the airports threat and the risk of a US escalation keep the danger elevated.
- **COMPLETE DEPARTURES NOW – THE THREATS WIDEN 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. Iran has widened its threats, the Strait remains largely closed, and President Trump's threat of a strike on Iran – which Iran warns could widen the war and target Gulf airports – cannot be discounted; completing departures now, while the airports are open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – NOTE THE THREAT TO GULF AIRPORTS.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; Iran has threatened Gulf airports and a widening of the war, and a US strike could trigger Iranian retaliation. Review shelter locations and NCEMA guidance, keep go-bags current, note the possibility of disruption to UAE airports, 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 Gulf producers are bypassing the Strait. Protect energy resilience; keep water, fuel and generator contingencies ready; the UAE's Fujairah exports provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT REMAINS LARGELY CLOSED.** Despite the diplomacy, the Strait of Hormuz remains largely closed, and Iran has hardened its stance and widened the maritime threat to the Bab el-Mandeb and the Indian Ocean. 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 the diplomacy and the risk of a US strike; build on the UAE's position.** Whether the mediators can bridge the sequencing impasse, and whether the US escalates or reaches a deal, are the key things to watch; a US strike is the principal trigger for an escalation, which Iran warns would widen the war. The Iran-UAE thaw and the UAE's pragmatic posture place it well; build on both while holding posture and noting the airports threat.

Return Guidance: MAXIMUM Held, High Readiness – Iran Widening Its Threats, the Impasse Persisting

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. Iran has hardened its position and widened its threats – to the Indian Ocean, and to Gulf airports – even as the indirect diplomacy continues but stalls on the sequencing impasse; the Strait remains largely closed. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, note the threat to Gulf airports, and watch the diplomacy and the risk of a US strike.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a stalled diplomacy with Iran widening its threats, and 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 airports will remain unaffected in the event of a US escalation.

- **Essential personnel – high readiness:** Maintain shelter-in-place and evacuation readiness at a high level, review shelter locations, keep documentation and go-bags current, note the threat to Gulf airports, and monitor whether the mediators bridge the impasse, whether the Strait reopens, a US strike on Iran and Iran's warned widening of the war, 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 but is blocked, the US is in no hurry, and Iran has hardened and widened its threats; 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, which Iran warns would widen the war to the Indian Ocean and against Gulf airports, a rogue hardliner attack, a collapse of the diplomacy, a strike on UAE territory or airports, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – Iran hardening its position and widening its threats to the Indian Ocean and Gulf airports, the impasse persisting, President Trump threatening a strike, the Strait still largely closed, but the Iran-UAE thaw and the UAE's pragmatic posture holding; 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 – Iran hardens and widens its threats.** A supreme-leader adviser (Safavi) warns further US/Israeli attacks could widen the war to the Red Sea, Bab el-Mandeb and "the Indian Ocean and perhaps beyond" (a first, implicitly Diego Garcia); and Iran (Rezaei) threatens Gulf airports if the Gulf states cooperate against it – a direct concern for the UAE. Iran has toughened its conditions; the sequencing impasse persists (Witkoff talks "promising" but no breakthrough). The Strait stays largely closed. There is no confirmed strike on UAE territory.
- **NOTE IRAN'S THREAT TO GULF AIRPORTS – A DIRECT UAE CONCERN.** Iran's threat to render Gulf airports unable to function if the Gulf states cooperate against it names the infrastructure – Dubai, Abu Dhabi – on which the UAE depends. It is conditional, and the Iran-UAE thaw may shield the UAE; but note it, hold high readiness, and avoid actions Iran could construe as cooperation.
- **NOTE THE INDIAN OCEAN THREAT – A WIDENING OF THE THEATRE.** Iran's Indian Ocean threat extends the declared theatre of the war for the first time beyond the Gulf, the Strait and the Red Sea, pointing implicitly at Diego Garcia; it is rhetorical for now, but signals that a US escalation could carry risks far beyond Hormuz.
- **WATCH THE DIPLOMACY AND THE RISK OF A US STRIKE.** Whether the mediators bridge the sequencing impasse, and whether the US escalates or reaches a deal, are the key things to watch; a US strike is the principal trigger for an escalation that Iran warns would widen the war and reach Gulf airports. 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 pragmatic posture keep the UAE relatively favourably placed and may shield its airports; 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 widening of the war – to the Indian Ocean, and against Gulf airports; (4) any threat to or disruption of UAE airports; (5) the Houthi campaign; (6) any strike on UAE territory.
- **Iran widens its threats – 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 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 one hundred and ninety-seventh edition.** Day 210 of the war.

8. KEY POINTS

- **IRAN THREATENS TO WIDEN THE WAR TO THE INDIAN OCEAN – A FIRST.** A military adviser to Iran's Supreme Leader, Major General Rahim Safavi, has warned that further US or Israeli attacks could expand the war from the Gulf and the Strait to the Red Sea and the Bab el-Mandeb and reach "the Indian Ocean and perhaps beyond" – the first time a supreme-leader adviser has explicitly raised the Indian Ocean, pointing implicitly at the US-UK base at Diego Garcia. It is rhetorical for now, with no stated operational plan, but extends the declared theatre of the war.
- **IRAN THREATENS GULF AIRPORTS – A DIRECT CONCERN FOR THE UAE.** Iran (Rezaei) has threatened that the airports of neighbouring Gulf states could be rendered unable to function if those states cooperate in the campaign to deny Iran its own aviation – the first Iranian threat directed at Gulf civil infrastructure. It names, in effect, the airports – Dubai, Abu Dhabi – on which the UAE's economy depends. It is conditional, and the Iran-UAE thaw may shield the UAE, but cannot be discounted; Iran has struck Kuwait's airport during the war.
- **IRAN HARDENS ITS POSITION; THE IMPASSE PERSISTS.** Iran has toughened its conditions, saying the Strait will stay closed and negotiations will not proceed unless its terms are met, and claiming it has won the war; Iranian hardliners have criticised the indirect US contact. The sequencing impasse – Iran insisting the blockade be lifted first, the US insisting on Iranian goodwill first – persists, and the US says a deal would require "hard work over time."
- **THE DIPLOMACY IS ALIVE BUT STALLED.** Iran's foreign minister, Araghchi, met the US envoy, Witkoff, indirectly through Qatari mediators to convey Iran's conditions, in talks the US called "promising" and "constructive" but which produced no breakthrough; Iran's road map remains on the table. The diplomacy is alive but stalled on the impasse, and Netanyahu has addressed the UNGA. Whether the mediators bridge the impasse is the key thing to watch.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE UAE'S POSITION FAVOURABLE BUT ITS AIRPORTS NAMED.** 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 relatively favourably placed and may shield its airports; but Iran's threat to Gulf airports names the UAE's critical infrastructure, and the risk of a US escalation persists. Hold high readiness and note the airports threat.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-SEVENTH EDITION. DAY 210.** Iran has hardened its position and widened its threats – to the Indian Ocean, and to Gulf airports – as the sequencing impasse persists and President Trump threatens a strike; 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, note the airports threat, and watch the diplomacy. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 25th September 2026 – Information current as of 09:00 GMT

IRAN HAS HARDENED ITS POSITION AND WIDENED ITS THREATS AS THE SEQUENCING IMPASSE PERSISTS. A MILITARY ADVISER TO THE SUPREME LEADER (SAFAVI) HAS WARNED THAT FURTHER US OR ISRAELI ATTACKS COULD EXPAND THE WAR FROM THE GULF AND THE STRAIT TO THE RED SEA AND THE BAB EL-MANDEB AND REACH "THE INDIAN OCEAN AND PERHAPS BEYOND" – THE FIRST SUCH THREAT, POINTING IMPLICITLY AT THE US-UK BASE AT DIEGO GARCIA (RHETORICAL FOR NOW, WITH NO STATED PLAN).

MORE DIRECTLY FOR THE UAE, IRAN (REZAEI) HAS THREATENED THAT GULF AIRPORTS COULD BE RENDERED UNABLE TO FUNCTION IF THE GULF STATES COOPERATE IN THE AVIATION DENIAL CAMPAIGN AGAINST IT – THE FIRST THREAT TO GULF CIVIL INFRASTRUCTURE, NAMING THE AIRPORTS (DUBAI, ABU DHABI) ON WHICH THE UAE DEPENDS; IT IS CONDITIONAL, AND THE IRAN-UAE THAW MAY SHIELD THE UAE, BUT

CANNOT BE DISCOUNTED. IRAN HAS TOUGHENED ITS CONDITIONS; THE INDIRECT TALKS (ARAGHCHI-WITKOFF) WERE "PROMISING" BUT PRODUCED NO BREAKTHROUGH. THE STRAIT STAYS LARGELY CLOSED. 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.

NOTE IRAN'S THREAT TO GULF AIRPORTS AS A DIRECT UAE CONCERN, AND THE INDIAN OCEAN THREAT AS A WIDENING OF THE THEATRE; WATCH WHETHER THE MEDIATORS BRIDGE THE IMPASSE AND THE RISK OF A US STRIKE; AND BUILD ON THE UAE'S FAVOURABLE POSITION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETY-SEVENTH EDITION. DAY 210.