WESTMINSTER SECURITY

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DAY 211 – TRUMP REJECTS IRAN'S REOPENING PROPOSAL; IRAN'S INDIAN OCEAN THREAT ESCALATES: PRESIDENT TRUMP HAS REJECTED IRAN'S ROAD MAP TO REOPEN THE STRAIT AND END THE WAR (SHARING A "TRUMP STRAIT" MAP) – A SETBACK – THOUGH THE CHANNEL IS NOT DEAD (PEZESHKIAN SAYS THE SUPREME LEADER BACKS A REOPENING PLAN; OMAN OFFERS TO KEEP MEDIATING). IRAN'S IRGC NOW THREATENS TO TARGET US SHIPS IN THE INDIAN OCEAN IF FIGHTING RESUMES; THE GULF-AIRPORTS THREAT STANDS. THE GCC (INCL. UAE) CONDEMNS FRESH HOUTHI STRIKES. THE STRAIT STAYS LARGELY CLOSED – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

26 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** PRESIDENT TRUMP HAS REJECTED IRAN'S PROPOSAL TO REOPEN THE STRAIT OF HORMUZ AND END THE WAR, A SETBACK TO THE DIPLOMACY, AND IRAN'S THREATS HAVE ESCALATED FURTHER, INCLUDING A HARDENED THREAT TO THE INDIAN OCEAN; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. Iran had presented a road map – a regionwide ceasefire, a phased Strait reopening, and an end to the US blockade – and given the US days to accept, but President Trump has rejected it, insisting Iran demonstrate goodwill first, touting the effectiveness of the US blockade, and sharing a map depicting a "Trump strait." The diplomatic channel is not, however, dead: President Pezeshkian says Iran's supreme leader backs a plan to reopen the Strait, and Oman has offered to continue mediating. But Iran's threats have hardened: its Revolutionary Guard now says it will target US ships in the Indian Ocean if the fighting resumes – a more specific threat than the rhetorical warnings of recent days – and its threat to Gulf airports stands. On the second front, the Gulf Cooperation Council, including the UAE, has condemned fresh Houthi strikes on Saudi Arabia as a grave escalation. The Iran-UAE thaw stands. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, holds readiness at a high level, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

⚖ **MIXED SIGNALS:** TRUMP REJECTS THE PROPOSAL, BUT THE CHANNEL IS NOT DEAD – AND IRAN'S THREATS HARDEN. The picture is a setback, but not a collapse. On the negative side: President Trump has rejected Iran's road map to reopen the Strait and end the war, insisting Iran move first and touting the blockade; and Iran has hardened its threats, its Revolutionary Guard now saying it will target US ships in the Indian Ocean if the fighting resumes, while its threat to Gulf airports stands. On the side that keeps the channel open: President Pezeshkian says Iran's supreme leader backs a plan to reopen the Strait, indicating Iran's leadership is united behind a diplomatic path; Oman has offered to continue mediating and to protect navigation; and Iran's road map remains on the table. The result is a diplomacy that has been rebuffed but not abandoned, alongside a

hardening of Iran's threats and a continuing Houthi campaign that the Gulf states, including the UAE, have jointly condemned.

⚠ **ASSESSMENT:** TRUMP'S REJECTION IS A SETBACK – BUT THE LEADERSHIP-BACKED PLAN AND OMANI MEDIATION KEEP A PATH OPEN. President Trump's rejection of Iran's proposal is a setback, and pushes a near-term de-escalation further off; the concrete road map is on the table but rebuffed, and the US continues to insist Iran move first. But two factors keep a path open. First, President Pezeshkian's statement that Iran's supreme leader backs a plan to reopen the Strait is significant: it indicates that Iran's leadership, and not only its president, is united behind a diplomatic path, which strengthens the prospect of an eventual deal if the sequencing can be bridged. Second, Oman has offered to continue mediating, and the road map remains on the table. Against this, Iran's threats have hardened – the Indian Ocean threat is now a specific threat to target US ships, and the Gulf airports threat stands – and a US escalation remains possible. For the UAE, the Gulf airports threat and the risk of a US escalation keep the danger elevated, and the GCC's joint condemnation of the Houthis shows the Gulf states hardening against that front. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 211 – TRUMP REJECTS THE PROPOSAL; IRAN'S THREATS HARDEN

President Trump has rejected Iran's proposal to reopen the Strait of Hormuz and end the war, a setback to the diplomacy, and Iran's threats have escalated further, including a hardened threat to the Indian Ocean; the Strait remains largely closed and the alert remains at MAXIMUM. Iran had presented the United States with a road map – a regionwide ceasefire of up to 60 days, a phased reopening of the Strait, and an end to the US naval blockade – and its security chief had given Washington some four to five days to accept its terms; but President Trump has rejected the proposal, insisting Iran demonstrate goodwill first, touting the effectiveness of the US blockade and claiming Iran had outsmarted itself, and sharing a map depicting what he called a "Trump strait." The diplomatic channel is not, however, dead: President Pezeshkian has said that Iran's supreme leader backs a plan to reopen the Strait, indicating Iran's leadership is united behind a diplomatic path, and Oman has offered to continue mediating and to help protect navigation through the Strait. But Iran's threats have hardened: its Revolutionary Guard now says it will target US ships in the Indian Ocean if the fighting resumes – a more specific threat than the rhetorical warnings of recent days – and its threat to render Gulf airports unable to function if the Gulf states cooperate against it stands. On the second front, the Gulf Cooperation Council, including the UAE, has condemned fresh Houthi strikes on Saudi Arabia, which the Saudi-led coalition said it intercepted, as a grave escalation and a threat to regional security. 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 Saturday 26 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. Trump rejects the proposal; Iran's threats harden. Complete departures; high readiness; suspend all Strait transits.
Trump rejects the proposal	**A SETBACK.** Trump has rejected Iran's road map to reopen the Strait and end the war, insisting Iran move first and touting the blockade; shared a "Trump strait" map.
But channel not dead	**LEADERSHIP-BACKED PLAN.** Pezeshkian says the supreme leader backs a reopening plan – Iran's leadership united behind a path; Oman offers to keep mediating.
Indian Ocean threat	**HARDENS.** Iran's IRGC now says it will target US ships in the Indian Ocean if fighting resumes – a specific threat, harder than recent rhetoric.

Gulf airports threat	**STANDS.** Iran's threat to render Gulf airports (Dubai, Abu Dhabi) unable to function if the Gulf states cooperate against it stands. A direct UAE concern. Conditional.
Yemen / GCC	**GCC CONDEMNS.** The GCC (incl. UAE) condemned fresh Houthi strikes on Saudi Arabia (intercepted) as a "grave escalation," calling for an international response.
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: President Trump's rejection of Iran's proposal is a setback that pushes a near-term de-escalation further off, and Iran's threats have hardened, including a specific threat to target US ships in the Indian Ocean; but the diplomatic channel is not dead, with Iran's leadership united behind a plan and Oman offering to mediate. The alert stays at MAXIMUM with high readiness; clients should note the hardened threats and the GCC's stance on the Houthis, and watch whether the mediation revives the diplomacy.

2. TRUMP REJECTS IRAN'S PROPOSAL – THE DIPLOMACY HITS A WALL, BUT IS NOT DEAD

- **Trump rejects the proposal:** President Trump has rejected Iran's proposal to reopen the Strait of Hormuz and end the war – the road map of a regionwide ceasefire, a phased Strait reopening, and an end to the US blockade that Iran had presented at the UN and given Washington days to accept; the rejection is a setback, and leaves the concrete diplomatic path rebuffed for now.
- **Iran must move first:** President Trump has maintained that Iran must demonstrate goodwill first, and has touted the effectiveness of the US naval blockade, claiming that Iran had outsmarted itself over the Strait and that the US is in total control of the waterway; the position keeps the sequencing impasse in place, with the US unwilling to lift the blockade before Iran acts.
- **A "Trump strait":** President Trump has shared a map depicting what he called a "Trump strait," a claiming, rhetorical gesture over the Strait of Hormuz; the gesture, alongside his rejection of Iran's proposal and his touting of the blockade, underlines that the US is maintaining maximum pressure and is in no hurry to reach a deal.
- **But the channel is not dead:** The diplomatic channel is not, however, dead. President Pezeshkian has said that Iran's supreme leader backs a plan to reopen the Strait – a significant statement, indicating that Iran's leadership, and not only its president, is united behind a diplomatic path, and strengthening the prospect of an eventual deal if the sequencing can be bridged.
- **Oman offers to mediate:** Oman has offered to continue mediating the conflict and to help protect navigation through the Strait, and Iran's road map remains on the table; the mediation, and Iran's leadership-backed plan, keep a path to a de-escalation open, even as President Trump's rejection sets it back and the impasse persists.

WS Assessment: President Trump's rejection of Iran's proposal is a setback, and pushes a near-term de-escalation further off; but the channel is not dead, with Iran's leadership united behind a plan and Oman offering to mediate. Clients should watch whether the mediation revives the diplomacy, while holding posture until a deal is reached and the Strait reopens.

3. IRAN'S INDIAN OCEAN THREAT ESCALATES – THE IRGC TO TARGET US SHIPS; THE GULF AIRPORTS THREAT STANDS

- **The Indian Ocean threat hardens:** Iran's threat to the Indian Ocean has hardened: where a supreme-leader adviser warned in recent days that the war could expand to the Indian Ocean, Iran's Revolutionary Guard now says it will target US ships in the Indian Ocean if the fighting resumes – a more specific, operational threat, directed at US naval assets in the ocean beyond the southern entrance to the Strait and the Gulf of Oman.
- **A widening of the maritime threat:** The threat extends the maritime dimension of the war beyond the Gulf, the Strait and the Red Sea to the Indian Ocean, and points, as before, implicitly at the US-UK base at Diego Garcia and at US warships operating in the region; it signals that a resumption of the fighting could carry risks for US shipping and assets well beyond the Strait of Hormuz.
- **Conditional on a resumption:** The threat is conditioned on a resumption of the fighting – that is, on a US or Israeli strike on Iran – and Iran's ability to strike US ships in the Indian Ocean is limited; but the hardening from rhetorical warning to specific threat marks an escalation in Iran's declared intentions, and a widening of the potential theatre of the war.
- **The Gulf airports threat stands:** Iran's threat to render the airports of neighbouring Gulf states – in effect, Dubai and Abu Dhabi – unable to function if those states cooperate in the campaign to deny Iran its own aviation stands, and remains the more direct concern for the UAE; it is conditional on cooperation against Iran, and the Iran-UAE thaw is a mitigating factor, but it names the infrastructure on which the UAE's economy depends.
- **The threats and the diplomacy:** Iran's hardening threats – to US ships in the Indian Ocean, and to Gulf airports – sit alongside its leadership-backed plan to reopen the Strait; the combination indicates that Iran is pursuing a diplomatic path while signalling that it is prepared to widen the war sharply if the US escalates, a dual posture of diplomacy and deterrence.

WS Assessment: Iran's hardening of its Indian Ocean threat, to a specific threat to target US ships, and the standing threat to Gulf airports, raise the stakes of a US escalation. For the UAE, the Gulf airports threat remains the more direct concern; clients should note both, hold high readiness, and watch the risk of a US strike, which is the trigger for the widening Iran threatens.

4. THE UAE; THE GCC CONDEMNS THE HOUTHIS; 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 Houthi strikes in the latest period were on Saudi Arabia, near Khamis Mushait, not near the UAE, and were intercepted by the Saudi-led coalition.
- **The GCC, including the UAE, condemns the Houthis:** The Gulf Cooperation Council, including the UAE, has condemned fresh Houthi strikes on Saudi Arabia as a grave escalation and a threat to regional security, and has called for an international response; the joint condemnation shows the Gulf states, the UAE among them, hardening their stance against the Houthi campaign, even as they pursue de-escalation with Iran.
- **The Gulf airports threat a direct concern:** Iran's threat to render Gulf airports unable to function if the Gulf states cooperate against it remains a direct concern for the UAE, naming Dubai and Abu Dhabi airports; the Iran-UAE thaw and the UAE's pragmatic posture may shield it, and the threat is conditional, but the UAE should avoid actions Iran could construe as cooperation and hold readiness against the contingency.
- **The risk of a US escalation persists:** President Trump's rejection of Iran's proposal, his maintenance of maximum pressure, and his standing threat to strike Iran, together with Iran's warning that it will widen the war – to US ships in the Indian Ocean, and against Gulf airports – if attacked, mean the risk of a US escalation, and of Iranian retaliation reaching the UAE, persists.
- **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 thaw with Iran and pragmatic posture may shield it; but Iran's threat to Gulf airports names the UAE's critical infrastructure, the GCC's condemnation of the Houthis shows the Gulf hardening against that front, and the risk of a US escalation 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 proposal rejected:** The Strait of Hormuz remains largely closed, with commercial transits at a trickle – a single commercial transit reported on the most recent independent count – and President Trump's rejection of Iran's reopening proposal leaves the closure in place; Iran has said 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 through the week as the diplomacy stalled and Iran hardened its threats; President Trump's rejection of the proposal, and Iran's hardened threats, keep the risk premium high, and a US escalation – which Iran warns could widen the war to the Indian Ocean and against Gulf airports – would drive prices 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 under its escort operation; but the Strait remains the primary route, and its closure keeps the volume far below the pre-war norm.
- **The Yemen front:** The Houthi campaign against Saudi Arabia continues, with fresh strikes intercepted by the Saudi-led coalition and the GCC condemning them; the proposed Saudi-Houthi truce, and Iran's linkage of the Saudi blockade of Houthi areas to any ceasefire, keep the Yemen file inside the wider negotiation, but for now the second 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 Strait remains largely closed and the reopening proposal rejected, oil elevated, and Iran's threats hardened; the diplomacy is set back but not dead. 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

- **Trump rejects the proposal, Iran's threats harden – but no confirmed strike on UAE territory.** President Trump has rejected Iran's reopening proposal, a setback, and Iran's threats have hardened – to US ships in the Indian Ocean, and, of direct concern to the UAE, to Gulf airports. 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 PROPOSAL IS REJECTED 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 reopening proposal has been rejected, 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 Gulf producers are bypassing it and Iran's road map remains on the table. 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, the reopening proposal rejected, and Iran has hardened the maritime threat to 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 whether the mediation revives the diplomacy; build on the UAE's position.** Whether the Omani and other mediation can revive the diplomacy after President Trump's rejection, and whether the US escalates, are the key things to watch; Iran's leadership-backed plan keeps a path open. The Iran-UAE thaw and the UAE's pragmatic posture place it well and may shield its airports; build on both while holding posture.

Return Guidance: MAXIMUM Held, High Readiness – the Proposal Rejected, the Channel Not Dead

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. President Trump has rejected Iran's reopening proposal, a setback, and Iran's threats have hardened – to US ships in the Indian Ocean, and to Gulf airports; but the channel is not dead, with Iran's leadership united behind a plan and Oman offering to mediate. 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 whether the mediation revives the diplomacy.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a rejected proposal with Iran hardening 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 diplomacy will revive or the airports 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 mediation revives the diplomacy, 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 revival of the diplomacy and 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. President Trump's rejection is a setback, but Iran's leadership-backed plan and the Omani mediation keep a path open; 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 US ships in 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 – the reopening proposal rejected but the channel not dead, Iran hardening its threats to the Indian Ocean and Gulf airports, President Trump maintaining pressure, 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 – Trump rejects the proposal; Iran's threats harden.** President Trump has rejected Iran's road map to reopen the Strait and end the war (sharing a "Trump strait" map), a setback; but the channel is not dead – Pezeshkian says the supreme leader backs a reopening plan, and Oman offers to keep mediating. Iran's IRGC now threatens to target US ships in the Indian Ocean if fighting resumes; the Gulf-airports threat stands. The GCC (incl. UAE) condemns fresh Houthi strikes. The Strait stays largely closed. There is no confirmed strike on UAE territory.
- **NOTE IRAN'S HARDENED INDIAN OCEAN THREAT – A SPECIFIC THREAT TO US SHIPS.** Iran's Indian Ocean threat has hardened from rhetoric to a specific threat to target US ships in the Indian Ocean if the fighting resumes, pointing implicitly at Diego Garcia and US warships. It is conditional on a resumption of fighting, but marks an escalation in Iran's declared intentions and a widening of the potential theatre.
- **NOTE THE GULF AIRPORTS THREAT – A DIRECT UAE CONCERN.** Iran's threat to render Gulf airports (Dubai, Abu Dhabi) unable to function if the Gulf states cooperate against it stands and remains the more direct concern for the UAE. 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.
- **THE CHANNEL IS NOT DEAD – WATCH WHETHER THE MEDIATION REVIVES IT.** Pezeshkian's statement that the supreme leader backs a reopening plan indicates Iran's leadership is united behind a diplomatic path, and Oman offers to keep mediating. Watch whether the mediation revives the diplomacy after President Trump's rejection; a bridging of the impasse would open a path to a de-escalation.
- **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 mediation revives the diplomacy after Trump's rejection; (2) whether the Strait reopens or the US strikes Iran; (3) Iran's warned widening of the war – to US ships in 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.
- **The proposal rejected, the channel not dead – emergency updates to follow.** Westminster Security will issue immediate updates on any revival or collapse of the diplomacy, 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-eighth edition.** Day 211 of the war.

8. KEY POINTS

- **TRUMP REJECTS IRAN'S REOPENING PROPOSAL – A SETBACK.** President Trump has rejected Iran's road map – a regionwide ceasefire, a phased Strait reopening, and an end to the blockade – which Iran had given Washington days to accept; he insists Iran move first, touts the blockade, and shared a map depicting a "Trump strait." The rejection is a setback, and pushes a near-term de-escalation further off.
- **BUT THE CHANNEL IS NOT DEAD – THE SUPREME LEADER BACKS A PLAN.** President Pezeshkian says Iran's supreme leader backs a plan to reopen the Strait – a significant statement, indicating Iran's leadership is united behind a diplomatic path, not only its president. Oman has offered to continue mediating, and the road map remains on the table; the diplomacy is rebuffed but not abandoned. Whether the mediation revives it is the key thing to watch.
- **IRAN'S INDIAN OCEAN THREAT HARDENS – A SPECIFIC THREAT TO US SHIPS.** Iran's Revolutionary Guard now says it will target US ships in the Indian Ocean if the fighting resumes – a more specific threat than the rhetorical warnings of recent days, pointing implicitly at Diego Garcia and US warships, and extending the maritime theatre beyond the Gulf, the Strait and the Red Sea. It is conditional on a resumption of fighting, but marks an escalation in Iran's declared intentions.
- **THE GULF AIRPORTS THREAT STANDS; THE GCC CONDEMNS THE HOUTHIS.** Iran's threat to render Gulf airports (Dubai, Abu Dhabi) unable to function if the Gulf states cooperate against it stands, and remains the more direct concern for the UAE. Meanwhile the GCC, including the UAE, has condemned fresh Houthi strikes on Saudi Arabia (intercepted) as a "grave escalation," showing the Gulf states hardening against that front.
- **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 Houthi strikes were on Saudi Arabia, not 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.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-EIGHTH EDITION. DAY 211.** President Trump has rejected Iran's reopening proposal, a setback, and Iran's threats have hardened – to US ships in the Indian Ocean, and to Gulf airports – though the channel is not dead; 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 whether the mediation revives the diplomacy. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 26th September 2026 – Information current as of 09:00 GMT

PRESIDENT TRUMP HAS REJECTED IRAN'S PROPOSAL TO REOPEN THE STRAIT OF HORMUZ AND END THE WAR – A SETBACK, INSISTING IRAN MOVE FIRST, TOUTING THE BLOCKADE, AND SHARING A "TRUMP STRAIT" MAP. BUT THE CHANNEL IS NOT DEAD: PRESIDENT PEZESHKIAN SAYS IRAN'S SUPREME LEADER BACKS A PLAN TO REOPEN THE STRAIT (IRAN'S LEADERSHIP UNITED BEHIND A PATH), AND OMAN OFFERS TO KEEP MEDIATING; THE ROAD MAP REMAINS ON THE TABLE.

IRAN'S THREATS HAVE HARDENED: ITS IRGC NOW SAYS IT WILL TARGET US SHIPS IN THE INDIAN OCEAN IF THE FIGHTING RESUMES – A SPECIFIC THREAT, HARDER THAN RECENT RHETORIC, POINTING IMPLICITLY AT DIEGO GARCIA – AND ITS THREAT TO GULF AIRPORTS (DUBAI, ABU DHABI) STANDS. THE GCC, INCLUDING THE UAE, HAS CONDEMNED FRESH HOUTHI STRIKES ON SAUDI ARABIA (INTERCEPTED) AS A "GRAVE ESCALATION." 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 HARDENED INDIAN OCEAN THREAT AND THE STANDING GULF-AIRPORTS THREAT (A DIRECT UAE CONCERN); WATCH WHETHER THE MEDIATION REVIVES THE DIPLOMACY AFTER TRUMP'S REJECTION, 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-EIGHTH EDITION. DAY 211.