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UAE SITREP DOCUMENT

DAY 212 – THE DIPLOMACY LIMPS ALONG: DESPITE REJECTING IRAN'S PROPOSAL, TRUMP EXPECTS TALKS TO RESUME THIS WEEK, AND THE MEDIATION CONTINUES (ARAGHCHI BRIEFED RUSSIA ON THE INDIRECT TALKS AND THE IRAN-OMAN SAFE-ROUTE UNDERSTANDING) – BUT IRAN INSISTS ON ITS CONDITIONS AND IS SCEPTICAL, AND THE IMPASSE PERSISTS. IRAN'S THREATS CONTINUE: THE IRGC MAINTAINS ITS THREAT TO TARGET US SHIPS IN THE INDIAN OCEAN IF FIGHTING RESUMES, CLAIMS TO HAVE SEIZED A US UNDERWATER DRONE IN THE STRAIT, AND THE GULF-AIRPORTS THREAT STANDS; US EMBASSIES WARN THE CONFLICT COULD ESCALATE RAPIDLY. THE STRAIT STAYS LARGELY CLOSED – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

27 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE DIPLOMACY IS LIMPING ALONG AFTER PRESIDENT TRUMP'S REJECTION OF IRAN'S PROPOSAL, WITH TALKS EXPECTED TO RESUME THIS WEEK BUT THE IMPASSE PERSISTING AND IRAN'S THREATS CONTINUING; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. Despite rejecting Iran's road map, President Trump expects talks with Iran to resume this week, and the mediation continues: Iran's foreign minister, Araghchi, has briefed his Russian counterpart on the indirect US-Iran negotiations and the Iran-Oman understanding on a safe route for shipping. But Iran has insisted on its conditions – a cessation of hostilities on all fronts including Lebanon, an end to the blockade, and the release of frozen assets – and Araghchi has expressed scepticism about re-engaging with the US. Iran's threats continue: its Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes, has claimed to seize a US underwater drone in the Strait, and its threat to Gulf airports stands; and US embassies across the region have warned that the conflict could escalate rapidly. 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 LIMPS ALONG – TALKS EXPECTED TO RESUME, BUT THE IMPASSE AND THE THREATS PERSIST. The picture is one of a diplomacy that is stalled but not dead, alongside continuing threats. On the side that keeps the channel open: despite rejecting Iran's proposal, President Trump expects talks to resume this week, indicating the rejection was of Iran's specific terms rather than of diplomacy altogether; the mediation continues, with Iran briefing Russia and the Iran-Oman safe-route understanding in place; and Iran's supreme-leader-backed plan remains on the table. On the harder side: the sequencing impasse persists, with Iran insisting on its full conditions and its foreign minister expressing scepticism about re-engaging with the US; Iran's threats continue – to US ships in the Indian Ocean, to Gulf airports – and it has claimed to seize a US underwater drone in the Strait; and US embassies have warned the conflict could escalate rapidly.

The result is a diplomacy limping forward against a persistent impasse and a continuing threat environment.

⚠ **ASSESSMENT:** TALKS MAY RESUME, BUT NOTHING HAS CHANGED ON THE GROUND – THE ALERT STAYS AT MAXIMUM. That President Trump expects talks to resume this week is a modestly positive signal: it indicates that his rejection was of Iran's specific terms, not of diplomacy, and that the channel – supported by Iran's leadership-backed plan, the Omani mediation, and the Iran-Oman safe-route understanding – remains open. But nothing has changed on the ground, and the alert stays at MAXIMUM. The sequencing impasse persists, Iran has insisted on its full conditions and its foreign minister has voiced scepticism about re-engaging, and the Strait remains largely closed – President Trump's claim of record oil transit is inconsistent with independent counts showing a trickle. Iran's threats continue, and US embassies have warned of a rapid escalation. For the UAE, the Gulf airports threat and the risk of a US escalation keep the danger elevated, and the Iran-UAE thaw is a mitigating factor. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 212 – THE DIPLOMACY LIMPS ALONG; THE IMPASSE AND THE THREATS PERSIST

The diplomacy is limping along after President Trump's rejection of Iran's proposal, with talks expected to resume this week but the impasse persisting and Iran's threats continuing; the Strait remains largely closed and the alert remains at MAXIMUM. Despite rejecting Iran's road map, President Trump expects talks with Iran to resume this week – indicating his rejection was of Iran's specific terms, rather than of diplomacy altogether – and the mediation continues: Iran's foreign minister, Araghchi, has briefed his Russian counterpart on the status of the indirect US-Iran negotiations and the Iran-Oman understanding on establishing a safe route for shipping through the Strait, and on the efforts of the mediators. But Iran has insisted on its conditions – a cessation of hostilities on all fronts, including in Lebanon, an end to the blockade and economic war, and the release of frozen assets – despite the rejection, and Araghchi has expressed scepticism about re-engaging with the US, saying that while there is always hope for diplomacy, Iran has no reason to return to it given the administration's behaviour. Iran's threats continue: its Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes – a pointed threat, as US vessels are operating there to enforce the blockade – has claimed to have seized a US unmanned underwater vehicle in the Strait, a claim the Pentagon has not confirmed, and its threat to Gulf airports stands. US embassies across the region have warned that the conflict has the potential to escalate rapidly, and Turkey and Pakistan are to join chief-of-staff talks with Saudi Arabia to support it against the Houthis. The Strait remains largely closed, President Trump's claim of a record oil transit over the weekend being inconsistent with independent counts. 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 Sunday 27 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The diplomacy limps along; the impasse and the threats persist. Complete departures; high readiness; suspend all Strait transits.
Talks to resume	**THIS WEEK.** Despite rejecting the proposal, Trump expects talks to resume this week; the mediation continues (Araghchi briefed Russia; Iran-Oman safe-route understanding in place).
But Iran sceptical	**IMPASSE PERSISTS.** Iran insists on its full conditions; Araghchi voices scepticism about re-engaging ("no reason… because of their behavior"). The impasse persists.

Indian Ocean threat	**MAINTAINED.** The IRGC maintains its threat to target US ships in the Indian Ocean if fighting resumes – pointed, as US vessels operate there to enforce the blockade.
Drone seizure	The IRGC claims to have seized a US unmanned underwater vehicle in the Strait; the Pentagon has not confirmed. The Gulf-airports threat stands.
US warning / Yemen	**"ESCALATE RAPIDLY."** US embassies warn the conflict could escalate rapidly. Turkey and Pakistan to join chief-of-staff talks with Saudi Arabia to support it against the Houthis.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE. The Iran-UAE thaw stands. Airports open.

WS Assessment: The diplomacy limps along – President Trump expects talks to resume this week, and the mediation continues – but nothing has changed on the ground: the impasse persists, Iran is sceptical, and its threats continue, with US embassies warning of a rapid escalation. The alert stays at MAXIMUM with high readiness. Clients should note that talks may resume, while holding posture until a deal is reached and the Strait reopens, and note the continuing threats.

2. TRUMP EXPECTS TALKS TO RESUME; IRAN INSISTS ON ITS CONDITIONS BUT IS SCEPTICAL

- **Trump expects talks to resume:** Despite rejecting Iran's proposal to reopen the Strait and end the war, President Trump expects talks with Iran to resume this week; the expectation indicates that his rejection was of Iran's specific terms – which he and US senators dismissed as not a serious offer – rather than of diplomacy altogether, and that the channel remains open.
- **The mediation continues:** The mediation continues: Iran's foreign minister, Araghchi, has briefed his Russian counterpart on the status of the indirect US-Iran negotiations, the Iran-Oman understanding on establishing a safe route for shipping through the Strait, and the mediators' continued efforts to convey the conditions for a return to the diplomatic process; the Omani mediation, and Iran's supreme-leader-backed plan, remain in place.
- **Iran insists on its conditions:** Iran has insisted on its conditions despite the rejection: a cessation of hostilities on all fronts, including in Lebanon, an end to the US blockade and economic war, and the release of frozen Iranian assets; Iran's position is unchanged, and it maintains that the Strait will reopen only if its terms are met, keeping the sequencing impasse in place.
- **Araghchi's scepticism:** Iran's foreign minister has expressed scepticism about re-engaging with the US, saying that while there is always hope for diplomacy, Iran has no reason to return to it and engage with the administration again, given its behaviour over the past two years; the scepticism, alongside Iran's insistence on its full conditions, indicates that Iran is in no hurry to concede, even as the channel remains open.
- **A diplomacy limping forward:** The result is a diplomacy limping forward: talks are expected to resume, the mediation continues, and Iran's plan remains on the table, but the impasse persists, Iran is sceptical, and no deal has been reached; the prospect of a de-escalation remains alive but distant, and depends on bridging the impasse.

WS Assessment: That talks are expected to resume this week is a modestly positive signal, indicating the channel remains open despite President Trump's rejection; but the impasse persists, Iran is sceptical, and no deal has been reached. Clients should watch whether the resumed talks bridge the impasse, while holding posture until a deal is reached and the Strait reopens.

3. IRAN'S THREATS CONTINUE – THE INDIAN OCEAN THREAT, THE DRONE SEIZURE; US EMBASSIES WARN OF RAPID ESCALATION

- **The Indian Ocean threat maintained:** Iran's Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes; the threat is pointed, as US vessels are operating in the Indian Ocean to enforce the blockade of Iranian ports and shipping, making US naval assets there a declared Iranian target in the event of a resumption, and extending the maritime theatre beyond the Gulf, the Strait and the Red Sea.
- **The drone seizure:** Iran's Revolutionary Guard has claimed to have seized a US unmanned underwater vehicle – a Remus 600 – operating in the Strait of Hormuz, according to Iranian state media; the Pentagon has not confirmed the claim. If accurate, the seizure of a US underwater drone would be a further assertion of Iranian control over the Strait, though such claims should be treated with caution pending confirmation.
- **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.
- **US embassies warn of rapid escalation:** US embassies across the Middle East have issued security alerts warning that the military conflict has the potential to escalate rapidly; the warning, alongside Iran's continuing threats and President Trump's maintenance of maximum pressure, underlines that the risk of a renewed escalation – which Iran warns would widen the war – persists, and that the diplomatic limping-forward has not lifted the danger.
- **Turkey and Pakistan support Saudi Arabia:** Turkey and Pakistan are to join chief-of-staff-level talks with Saudi Arabia to support the kingdom against the Houthis, who have escalated their attacks, declared a maritime blockade, and seized Yemen's Red Sea coast; the involvement of Turkey and Pakistan indicates a broadening regional effort to counter the Houthi campaign, even as the Gulf states pursue de-escalation with Iran.

WS Assessment: Iran's continuing threats – to US ships in the Indian Ocean, to Gulf airports – its claimed seizure of a US drone, and the US embassies' warning of a rapid escalation, underline that the danger persists despite the diplomatic limping-forward. For the UAE, the Gulf airports threat remains the more direct concern; clients should note the continuing threats, hold high readiness, and watch the risk of a US escalation.

4. THE UAE; THE REGIONAL PICTURE

- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack in the waters near the UAE in the latest period; the drone seizure claimed by Iran was in the Strait, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The Gulf airports threat a standing concern:** Iran's threat to Gulf airports remains a standing 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 on cooperation against Iran, but the UAE should avoid actions Iran could construe as cooperation and hold readiness against the contingency, particularly given the US embassies' warning of a rapid escalation.
- **The UAE's favourable threads hold:** The Iran-UAE thaw, the Houthi pledge not to target non-Saudi commercial vessels, and the UAE's Fujairah export route stand, and the prospect of talks resuming this week keeps a path to a de-escalation open; the UAE remains in a relatively favourable position, though the continuing threats and the risk of a US escalation keep the danger elevated.
- **The risk of a US escalation persists:** President Trump's maintenance of maximum pressure, his standing threat to strike Iran, and 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; the US embassies' warning of a rapid escalation underlines the risk.
- **US security posture:** US embassies across the region have warned of a rapid escalation, 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 US embassies have warned of a rapid escalation, and the risk of a US escalation persists. Clients should hold high readiness, note the airports threat, and watch the resumed talks 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 independent counts showing commercial transits at a trickle; President Trump's claim that a record volume of oil – more than twenty million barrels – transited the Strait over the weekend is inconsistent with those counts, and Iran maintains that the Strait will stay closed unless its terms are met.
- **Oil elevated:** Oil remains historically elevated, with the Strait's closure keeping prices up; a resumption of talks that bridges the impasse and reopens the Strait 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, and the market awaits the outcome of the resumed 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 – with the US operating an escort operation and vessels in the Indian Ocean to enforce its blockade; 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 Turkey and Pakistan joining chief-of-staff talks to support the kingdom; the Houthis retain their maritime blockade and their hold on Yemen's Red Sea coast, and the Yemen file remains 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 oil elevated, and President Trump's claim of a record transit is inconsistent with the independent counts; the diplomacy limps forward but has not reopened the Strait. 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

- **The diplomacy limps along – but the threats continue, and no confirmed strike on UAE territory.** Talks are expected to resume this week, and the mediation continues, but the impasse persists, Iran is sceptical, and its threats continue – 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, the US embassies' warning of a rapid escalation, and the risk of a US escalation keep the danger elevated.
- **COMPLETE DEPARTURES NOW – THE THREATS CONTINUE 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, Iran's threats continue, and US embassies have warned the conflict could escalate rapidly – which Iran warns could target Gulf airports; completing departures now, while the airports are open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – NOTE THE THREAT TO GULF AIRPORTS AND THE US WARNING.** 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, US embassies have warned of a rapid escalation, 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 talks may resume. 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 IRGC has claimed to seize a US drone in it, and Iran maintains its threats. 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 resumed talks; build on the UAE's position.** Whether the resumed talks this week bridge the impasse is the key thing to watch; a bridging would open a path to a reopening and a de-escalation. 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 Diplomacy Limping Along, the Threats Continuing

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. Talks are expected to resume this week and the mediation continues, but the impasse persists, Iran is sceptical, its threats continue, and US embassies warn of a rapid escalation; 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 resumed talks.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a diplomacy limping forward with the impasse persisting 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 resumed talks will succeed 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 the US embassies' warning, and monitor whether the resumed talks 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 successful resumption of talks 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. Talks may resume, but the impasse persists and Iran is sceptical; 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 resumed talks, 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 diplomacy limping along with talks expected to resume, but the impasse persisting, Iran sceptical, its threats continuing, US embassies warning of a rapid escalation, the Strait still largely closed, but the Iran-UAE thaw 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 – the diplomacy limps along.** Despite rejecting Iran's proposal, President Trump expects talks to resume this week, and the mediation continues (Araghchi briefed Russia on the indirect talks and the Iran-Oman safe-route understanding). But Iran insists on its conditions and is sceptical, and the impasse persists. Iran's threats continue – to target US ships in the Indian Ocean, to Gulf airports – it claims to have seized a US drone in the Strait, and US embassies warn of a rapid escalation. The Strait stays largely closed. There is no confirmed strike on UAE territory.
- **WATCH THE RESUMED TALKS – BUT NOTHING HAS CHANGED ON THE GROUND.** That talks are expected to resume this week is modestly positive, indicating the channel remains open; but the impasse persists, Iran is sceptical, and no deal has been reached. Watch whether the resumed talks bridge the impasse, while holding posture until the Strait reopens.
- **NOTE IRAN'S CONTINUING THREATS – THE INDIAN OCEAN AND GULF AIRPORTS.** Iran maintains its threat to target US ships in the Indian Ocean if fighting resumes – pointed, as US vessels operate there – and its threat to Gulf airports (Dubai, Abu Dhabi) stands. Note both, hold high readiness, and, on the airports threat, avoid actions Iran could construe as cooperation.
- **HEED THE US WARNING OF A RAPID ESCALATION.** US embassies across the region have warned the conflict could escalate rapidly. A US strike on Iran remains the principal trigger, which Iran warns would widen the war and reach Gulf airports. Hold high readiness against that contingency and complete departures now.
- **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 resumed talks this week bridge the impasse; (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 diplomacy limps along, the threats continue – emergency updates to follow.** Westminster Security will issue immediate updates on any breakthrough or collapse in the resumed talks, 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-ninth edition.** Day 212 of the war.

8. KEY POINTS

- **THE DIPLOMACY LIMPS ALONG – TALKS EXPECTED TO RESUME THIS WEEK.** Despite rejecting Iran's proposal, President Trump expects talks to resume this week – indicating his rejection was of Iran's specific terms, not of diplomacy – and the mediation continues: Iran briefed Russia on the indirect talks and the Iran-Oman safe-route understanding, and its supreme-leader-backed plan remains on the table. The channel remains open, but no deal has been reached.
- **BUT IRAN IS SCEPTICAL AND THE IMPASSE PERSISTS.** Iran has insisted on its full conditions – a cessation on all fronts including Lebanon, an end to the blockade, and the release of assets – despite the rejection, and its foreign minister has voiced scepticism about re-engaging with the US, saying Iran has "no reason… because of their behavior." The sequencing impasse persists, and Iran is in no hurry to concede.
- **IRAN'S THREATS CONTINUE – THE INDIAN OCEAN, GULF AIRPORTS, A DRONE SEIZURE.** Iran's Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes – pointed, as US vessels operate there to enforce the blockade – and its threat to Gulf airports stands; it has claimed to seize a US unmanned underwater vehicle in the Strait, a claim the Pentagon has not confirmed. The threats underline that the danger persists despite the diplomatic limping-forward.
- **US EMBASSIES WARN OF A RAPID ESCALATION; TURKEY AND PAKISTAN BACK SAUDI ARABIA.** US embassies across the region have warned that the conflict has the potential to escalate rapidly, underlining that the risk of a renewed escalation persists. Turkey and Pakistan are to join chief-of-staff talks with Saudi Arabia to support it against the Houthis, indicating a broadening regional effort to counter the Houthi campaign.
- **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 drone seizure claimed by Iran was in the Strait, 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 US embassies' warning and the risk of a US escalation keep the danger elevated. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-NINTH EDITION. DAY 212.** The diplomacy limps along – talks expected to resume this week, but the impasse persisting, Iran sceptical, and its threats continuing – and US embassies warn of a rapid escalation; 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 resumed talks. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 27th September 2026 – Information current as of 09:00 GMT

THE DIPLOMACY IS LIMPING ALONG AFTER PRESIDENT TRUMP'S REJECTION OF IRAN'S PROPOSAL. DESPITE THE REJECTION, TRUMP EXPECTS TALKS TO RESUME THIS WEEK – INDICATING HE REJECTED IRAN'S SPECIFIC TERMS, NOT DIPLOMACY – AND THE MEDIATION CONTINUES (ARAGHCHI BRIEFED RUSSIA ON THE INDIRECT TALKS AND THE IRAN-OMAN SAFE-ROUTE UNDERSTANDING). BUT IRAN INSISTS ON ITS FULL CONDITIONS AND ITS FOREIGN MINISTER IS SCEPTICAL ABOUT RE-ENGAGING, AND THE IMPASSE PERSISTS.

IRAN'S THREATS CONTINUE: ITS IRGC MAINTAINS ITS THREAT TO TARGET US SHIPS IN THE INDIAN OCEAN IF FIGHTING RESUMES (POINTED, AS US VESSELS OPERATE THERE TO ENFORCE THE BLOCKADE), CLAIMS TO HAVE SEIZED A US UNDERWATER DRONE IN THE STRAIT (PENTAGON UNCONFIRMED), AND ITS THREAT TO GULF AIRPORTS (DUBAI, ABU DHABI) STANDS; US EMBASSIES WARN THE CONFLICT COULD ESCALATE RAPIDLY. THE

STRAIT STAYS LARGELY CLOSED (TRUMP'S "RECORD OIL" CLAIM IS INCONSISTENT WITH INDEPENDENT COUNTS). 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.

WATCH THE RESUMED TALKS THIS WEEK – BUT NOTHING HAS CHANGED ON THE GROUND; NOTE IRAN'S CONTINUING THREATS (THE INDIAN OCEAN AND GULF AIRPORTS) AND THE US WARNING OF A RAPID ESCALATION; AND BUILD ON THE UAE'S FAVOURABLE POSITION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETY-NINTH EDITION. DAY 212.