WESTMINSTER SECURITY

Great British Standards, Great British Security.

UAE SITREP DOCUMENT

DAY 213 (SEVEN MONTHS; 200TH EDITION) – THE DIPLOMACY STALLS AND HARDENS: TRUMP HAS REJECTED IRAN'S LATEST PROPOSAL, AND IRAN (ARAGHCHI) NOW SAYS IT IS PREPARED TO RESUME WAR WITH THE US – A HARDENING FROM YESTERDAY'S SCEPTICISM. THE US APPEARS IN NO HURRY (THE DE-ESCALATION TIMELINE EXTENDING); THE MEDIATION CHANNEL TECHNICALLY REMAINS (THE IRAN-OMAN SAFE-ROUTE UNDERSTANDING). IRAN'S THREATS CONTINUE (US SHIPS IN THE INDIAN OCEAN, GULF AIRPORTS); A SAUDI AIRSTRIKE ON TAIZ KILLED SEVEN. THE STRAIT STAYS NEAR A STANDSTILL – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

28 September 2026 (0830 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE DIPLOMACY HAS STALLED AND HARDENED AT THE SEVEN-MONTH MARK OF THE WAR, WITH PRESIDENT TRUMP HAVING REJECTED IRAN'S LATEST PROPOSAL AND IRAN NOW SAYING IT IS PREPARED TO RESUME WAR; THE STRAIT REMAINS NEAR A STANDSTILL AND THE ALERT REMAINS AT MAXIMUM. President Trump has rejected Iran's latest proposal to reopen the Strait and restart talks, according to US officials, and Iran's foreign minister, Araghchi, has asserted that Tehran is prepared to resume war with the US – a hardening from his scepticism of recent days about re-engaging. The US appears in no hurry to reach a deal, having routed oil around the Strait and judged that it can afford to wait, and the near-term prospect of a de-escalation has dimmed. But the mediation channel technically remains: the Iran-Oman understanding on a safe route for shipping is in place, and mediators continue their efforts. Iran's threats continue – to target US ships in the Indian Ocean if the fighting resumes, and against Gulf airports – and on the second front, a Saudi airstrike on Taiz in Yemen has killed seven. 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 STALLS AND HARDENS – BUT THE CHANNEL TECHNICALLY REMAINS. The picture at the seven-month mark is of a diplomacy that has stalled and hardened, though not entirely closed. On the harder side: President Trump has rejected Iran's latest proposal; Iran's foreign minister now says Tehran is prepared to resume war with the US; the US appears in no hurry, having adapted to the closure and judged it can afford to wait; and the near-term prospect of a de-escalation has dimmed, with analysts pushing the timeline back. On the side that keeps a channel open: the Iran-Oman understanding on a safe route for shipping remains in place, mediators continue their efforts, and Iran's supreme-leader-backed plan has not been withdrawn. But Iran's threats continue – to US ships in the Indian Ocean, to Gulf airports – and the

Yemen front grinds on, with a Saudi airstrike on Taiz killing seven. The net picture is of a war settling into a prolonged standoff, with the diplomacy stalled and both sides hardening.

⚠ **ASSESSMENT:** A PROLONGED STANDOFF – THE DIPLOMACY STALLED, BOTH SIDES HARDENING, THE ALERT AT MAXIMUM. At the seven-month mark, the war appears to be settling into a prolonged standoff. President Trump's rejection of Iran's latest proposal, Iran's assertion that it is prepared to resume war, and the US judgement that it can afford to wait – having routed oil around the Strait and kept prices from spiking – together indicate that a near-term de-escalation has become less likely, and that both sides are hardening. The mediation channel technically remains, and neither side has closed it, so a deal is not impossible; but the momentum has gone out of the diplomacy, and the standoff may drag on. For UAE clients, a prolonged standoff means the disruption – the closed Strait, the threat environment, the risk of a US escalation – persists, and the Gulf airports threat and Iran's readiness to resume war keep the danger elevated; the Iran-UAE thaw remains a mitigating factor. The posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 213 – THE DIPLOMACY STALLS AND HARDENS AT SEVEN MONTHS

The diplomacy has stalled and hardened at the seven-month mark of the war, and on the two-hundredth edition of this briefing, with President Trump having rejected Iran's latest proposal and Iran now saying it is prepared to resume war; the Strait remains near a standstill and the alert remains at MAXIMUM. President Trump has rejected Iran's latest proposal to reopen the Strait of Hormuz and restart talks aimed at a deal, according to US officials, and Iran's foreign minister, Araghchi, has asserted that Tehran is prepared to resume war with the United States – a hardening from his scepticism of recent days about re-engaging with the administration. The United States appears in no hurry to reach a deal: having succeeded in routing oil around the Strait and kept prices from spiking, it has judged that it can afford to wait, and analysts have pushed back their timeline for a de-escalation, so the near-term prospect of one has dimmed. But the mediation channel technically remains open: the Iran-Oman understanding on establishing a safe route for shipping through the Strait is in place, mediators continue their efforts to convey the conditions for a return to the diplomatic process, and Iran's supreme-leader-backed plan has not been withdrawn. Iran's threats continue – its Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes, and its threat to Gulf airports stands – and on the second front, a Saudi airstrike on Taiz in south-west Yemen has killed seven and wounded dozens, according to Houthi media, while Turkey and Pakistan join talks to support Saudi Arabia against the Houthis. 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 0830 GMT Monday 28 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The diplomacy stalls and hardens; a prolonged standoff. Complete departures; high readiness; suspend all Strait transits.
Diplomacy	**STALLS AND HARDENS.** Trump rejected Iran's latest proposal; Araghchi says Iran is prepared to resume war with the US. A near-term de-escalation has dimmed.
US posture	**IN NO HURRY.** Having routed oil around the Strait and kept prices from spiking, the US judges it can afford to wait; analysts push the timeline back.
Channel remains	The Iran-Oman safe-route understanding is in place, mediators continue, and Iran's supreme-leader-backed plan has not been withdrawn. A deal is not impossible.

Iran's threats	**CONTINUE.** The IRGC maintains its threat to target US ships in the Indian Ocean if fighting resumes; the Gulf-airports threat (Dubai, Abu Dhabi) stands.
Yemen front	**GRINDS ON.** A Saudi airstrike on Taiz killed seven (Houthi media). Turkey and Pakistan join talks to support Saudi Arabia 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: At the seven-month mark, the war appears to be settling into a prolonged standoff: the diplomacy has stalled and hardened, with President Trump rejecting Iran's latest proposal, Iran saying it is prepared to resume war, and the US judging it can afford to wait. The mediation channel technically remains, so a deal is not impossible, but the momentum has gone. The alert stays at MAXIMUM with high readiness; clients should prepare for the disruption to persist, and note the continuing threats.

2. THE DIPLOMACY STALLS AND HARDENS – TRUMP REJECTS THE LATEST PROPOSAL, IRAN SAYS IT IS PREPARED TO RESUME WAR

- **Trump rejects the latest proposal:** President Trump has rejected Iran's latest proposal to reopen the Strait of Hormuz and restart talks aimed at a deal, according to US officials; the rejection, following his earlier turning-down of Iran's road map, indicates that the US continues to judge Iran's terms unacceptable, and that the gap between the parties has not been bridged.
- **Iran says it is prepared to resume war:** Iran's foreign minister, Araghchi, has asserted that Tehran is prepared to resume war with the United States – a hardening from his scepticism of recent days about re-engaging with the administration; the statement is a deterrent signal, indicating that Iran is prepared to fight if the diplomacy fails or the US escalates, rather than a declaration of intent to attack, but it marks a hardening of Iran's tone.
- **The two sides diverge:** The two sides have diverged: while President Trump had said he expected talks to resume this week, Iran's foreign minister now says Tehran is prepared to resume war, and has expressed scepticism about re-engaging; the divergence reflects the stalling of the diplomacy after President Trump's rejection, and the hardening of positions on both sides.
- **But the channel technically remains:** The mediation channel technically remains open: the Iran-Oman understanding on establishing a safe route for shipping through the Strait is in place, mediators continue their efforts to convey the conditions for a return to the diplomatic process, and Iran's supreme-leader-backed plan has not been withdrawn; neither side has formally closed the channel, so a deal remains possible if the momentum can be recovered.
- **A prolonged standoff:** The result is a war that appears to be settling into a prolonged standoff: the diplomacy has stalled, both sides have hardened, and the near-term prospect of a de-escalation has dimmed, even as the channel remains technically open; the standoff, and the disruption it brings, may drag on.

WS Assessment: The diplomacy has stalled and hardened – President Trump rejecting the latest proposal, Iran saying it is prepared to resume war – and a near-term de-escalation has become less likely. The channel technically remains, so a deal is not impossible, but the momentum has gone; clients should prepare for a prolonged standoff and hold posture.

3. THE US IN NO HURRY; IRAN'S THREATS CONTINUE; THE YEMEN FRONT

- **The US judges it can afford to wait:** The United States appears in no hurry to reach a deal: having succeeded in routing oil around the Strait – keeping prices from spiking past $100 a barrel as the global economy adapts to the closure – it has judged that it can afford to wait, and analysts have pushed back their timeline for a de-escalation; the pressure on Washington to force an imminent reopening has eased, reducing its incentive to concede.
- **The Indian Ocean threat maintained:** Iran's Revolutionary Guard maintains its threat to target US ships in the Indian Ocean if the fighting resumes, extending the maritime theatre beyond the Gulf, the Strait and the Red Sea; the threat is pointed, as US vessels operate in the Indian Ocean to enforce the blockade, and it remains a signal that a resumption of the fighting could carry risks for US assets well beyond the Strait.
- **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 Yemen front grinds on:** On the second front, a Saudi airstrike on Taiz in south-west Yemen has killed seven and wounded dozens, according to Houthi media, as the Saudi-Houthi conflict continues; the Houthis retain their maritime blockade of Saudi shipping and their hold on Yemen's Red Sea coast, and Turkey and Pakistan have joined chief-of-staff talks to support Saudi Arabia against them.
- **The drone-seizure claim:** Iran's Revolutionary Guard has claimed to have seized a US unmanned underwater vehicle operating in the Strait, a claim the Pentagon has not confirmed; the claim, alongside Iran's continuing threats and its readiness to resume war, indicates that Iran continues to assert its control of the Strait and to signal its resolve, even as the mediation continues.

WS Assessment: The US judgement that it can afford to wait, Iran's continuing threats – to US ships in the Indian Ocean, to Gulf airports – and the grinding Yemen front together point to a prolonged standoff. 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 Saudi airstrike in the latest period was on Taiz in Yemen, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **A prolonged standoff means persistent disruption:** A prolonged standoff, as now appears likely, means the disruption – the closed Strait, the heightened threat environment, the risk of a US escalation – persists for the UAE; the UAE has adapted, routing oil through Fujairah and maintaining its thaw with Iran, but the standoff's persistence keeps the pressure on, and clients should plan for a protracted period of disruption.
- **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, but the UAE should avoid actions Iran could construe as cooperation and hold readiness against the contingency, particularly given Iran's readiness to resume war.
- **The risk of a US escalation persists:** President Trump's maintenance of maximum pressure and his standing threat to strike Iran, together with Iran's readiness to resume war and its 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, even in a prolonged standoff.
- **US security posture:** US security alerts for the region remain in force, with the State Department advising Americans to seriously reconsider travel to and through the region; 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 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 a prolonged standoff means persistent disruption, Iran's threat to Gulf airports names the UAE's critical infrastructure, and the risk of a US escalation persists. Clients should hold high readiness, plan for a protracted period of disruption, and note the airports threat.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait near a standstill:** The Strait of Hormuz remains near a standstill, with commercial transits at a trickle amid sporadic attacks on oil tankers; the blockade persists, Iran maintains that the Strait will stay closed unless its terms are met, and President Trump's rejection of Iran's reopening proposal leaves the closure in place, with no phased reopening begun.
- **Oil below the spike level:** Oil remains historically elevated but has been kept from spiking past $100 a barrel by the success of Gulf and US efforts to route oil around the Strait; the global economy has adapted to the closure, which has eased the pressure for an imminent reopening, though a US escalation – which Iran warns could widen the war – 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 operating an escort operation and vessels in the Indian Ocean to enforce its blockade; the routing of oil around the Strait has kept the market supplied, though far below the pre-war norm.
- **The Yemen front:** The Saudi-Houthi conflict continues, with a Saudi airstrike on Taiz killing seven and the Houthis retaining their maritime blockade of Saudi shipping and their hold on Yemen's Red Sea coast; Turkey and Pakistan have joined talks to support Saudi Arabia, but for now the second front remains disrupted, keeping the Bab el-Mandeb route under pressure.
- **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 near a standstill and oil elevated but below the spike level, with the global economy adapted to the closure; the diplomacy has stalled, and a prolonged closure now appears likely. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **A prolonged standoff – but no confirmed strike on UAE territory.** The diplomacy has stalled and hardened – Trump rejecting the latest proposal, Iran prepared to resume war – and a prolonged standoff now appears likely, with Iran's threats to US ships in the Indian Ocean and to Gulf airports standing. 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, and clients should plan for protracted disruption.
- **COMPLETE DEPARTURES NOW – A PROLONGED STANDOFF AND A POSSIBLE US ESCALATION.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The diplomacy has stalled, a prolonged standoff appears likely, and President Trump's threat of a strike on Iran – which Iran, prepared to resume war, warns could 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 is prepared to resume war, 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 near a standstill, though Gulf producers are bypassing it and the market has adapted. Protect energy resilience; keep water, fuel and generator contingencies ready; the UAE's Fujairah exports provide a degree of insulation. Plan for a protracted closure.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT REMAINS NEAR A STANDSTILL.** Despite the mediation, the Strait of Hormuz remains near a standstill, the reopening proposal rejected, and Iran maintains its threats and its readiness to resume war. 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.
- **Plan for a prolonged standoff; build on the UAE's position.** With the diplomacy stalled and a prolonged standoff likely, plan for a protracted period of disruption; the mediation channel technically remains, so a de-escalation is not impossible, and clients should watch for its revival. 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 Stalled, a Prolonged Standoff Likely

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The diplomacy has stalled and hardened – Trump rejecting the latest proposal, Iran prepared to resume war, the US in no hurry – and a prolonged standoff now appears likely, though the mediation channel technically remains. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, note the threat to Gulf airports, and plan for protracted disruption.

- **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 a prolonged standoff likely and the Strait near a standstill 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; with a prolonged standoff likely, do not defer in expectation of an imminent resolution.

- **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 prolonged standoff; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A revival of the diplomacy and a bridging of the 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. The diplomacy has stalled, but the channel technically remains; 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 – prepared to resume war – warns would widen the war to US ships in the Indian Ocean and against Gulf airports, a rogue hardliner attack, a collapse of the mediation, 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 stalled and hardened, a prolonged standoff likely, Iran prepared to resume war, the Strait near a standstill, but the mediation channel technically remaining and 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 stalls and hardens at seven months.** President Trump has rejected Iran's latest proposal, and Iran (Araghchi) now says it is prepared to resume war with the US – a hardening. The US appears in no hurry (the de-escalation timeline extending); the mediation channel technically remains (the Iran-Oman safe-route understanding). Iran's threats continue – to US ships in the Indian Ocean, to Gulf airports; a Saudi airstrike on Taiz killed seven. The Strait stays near a standstill. There is no confirmed strike on UAE territory.
- **PLAN FOR A PROLONGED STANDOFF.** With the diplomacy stalled, both sides hardening, and the US judging it can afford to wait, a prolonged standoff now appears likely. Plan for a protracted period of disruption – the closed Strait, the threat environment – while watching for the mediation to revive the diplomacy.
- **NOTE IRAN'S CONTINUING THREATS AND ITS READINESS TO RESUME WAR.** Iran maintains its threat to target US ships in the Indian Ocean if fighting resumes, its threat to Gulf airports (Dubai, Abu Dhabi) stands, and it says it is prepared to resume war. Note the threats, hold high readiness, and, on the airports threat, avoid actions Iran could construe as cooperation.
- **THE CHANNEL TECHNICALLY REMAINS – WATCH FOR A REVIVAL.** The Iran-Oman safe-route understanding is in place, mediators continue, and Iran's supreme-leader-backed plan has not been withdrawn; a deal is not impossible if the momentum can be recovered. Watch for the mediation to revive the diplomacy.
- **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; (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.
- **A prolonged standoff at seven months – 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 two hundredth edition.** Day 213 of the war; seven months since it began.

8. KEY POINTS

- **THE DIPLOMACY STALLS AND HARDENS AT SEVEN MONTHS.** President Trump has rejected Iran's latest proposal to reopen the Strait and restart talks, and Iran's foreign minister has asserted that Tehran is prepared to resume war with the US – a hardening from his scepticism of recent days. The two sides have diverged, and a near-term de-escalation has dimmed; the war appears to be settling into a prolonged standoff on the two-hundredth edition of this briefing.
- **THE US APPEARS IN NO HURRY.** Having succeeded in routing oil around the Strait and kept prices from spiking past $100, the US has judged that it can afford to wait, and analysts have pushed back their timeline for a de-escalation; the pressure on Washington for an imminent reopening has eased, reducing its incentive to concede and lengthening the likely standoff.
- **BUT THE MEDIATION CHANNEL TECHNICALLY REMAINS.** The Iran-Oman understanding on a safe route for shipping is in place, mediators continue their efforts, and Iran's supreme-leader-backed plan has not been withdrawn; neither side has formally closed the channel, so a deal remains possible if the momentum can be recovered. Whether the mediation revives the diplomacy is the key thing to watch.
- **IRAN'S THREATS CONTINUE; THE YEMEN FRONT GRINDS ON.** Iran maintains its threat to target US ships in the Indian Ocean if the fighting resumes – pointed, as US vessels operate there – and its threat to Gulf airports stands; it has claimed to seize a US underwater drone in the Strait. On the second front, a Saudi airstrike on Taiz killed seven, and Turkey and Pakistan have joined talks to support Saudi Arabia against the Houthis.
- **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 Saudi airstrike was on Taiz in Yemen, 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 a prolonged standoff means persistent disruption. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDREDTH EDITION. DAY 213; SEVEN MONTHS.** The diplomacy has stalled and hardened – Trump rejecting the latest proposal, Iran prepared to resume war, the US in no hurry – and a prolonged standoff now appears likely, though the channel technically remains; the Strait is near a standstill 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 plan for protracted disruption. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 28th September 2026 – Information current as of 08:30 GMT

AT THE SEVEN-MONTH MARK OF THE WAR, AND ON THE TWO-HUNDREDTH EDITION OF THIS BRIEFING, THE DIPLOMACY HAS STALLED AND HARDENED. PRESIDENT TRUMP HAS REJECTED IRAN'S LATEST PROPOSAL TO REOPEN THE STRAIT AND RESTART TALKS, AND IRAN'S FOREIGN MINISTER HAS ASSERTED THAT TEHRAN IS PREPARED TO RESUME WAR WITH THE US – A HARDENING FROM YESTERDAY'S SCEPTICISM. THE US APPEARS IN NO HURRY, HAVING ROUTED OIL AROUND THE STRAIT AND JUDGED IT CAN AFFORD TO WAIT; A NEAR-TERM DE-ESCALATION HAS DIMMED, AND A PROLONGED STANDOFF APPEARS LIKELY.

BUT THE MEDIATION CHANNEL TECHNICALLY REMAINS (THE IRAN-OMAN SAFE-ROUTE UNDERSTANDING; IRAN'S SUPREME-LEADER-BACKED PLAN NOT WITHDRAWN), SO A DEAL IS NOT IMPOSSIBLE. IRAN'S THREATS CONTINUE – TO TARGET US SHIPS IN THE INDIAN OCEAN IF FIGHTING RESUMES, AND AGAINST GULF AIRPORTS (DUBAI, ABU DHABI) – AND A SAUDI AIRSTRIKE ON TAIZ KILLED SEVEN. THE STRAIT STAYS NEAR A

STANDSTILL. 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.

PLAN FOR A PROLONGED STANDOFF; NOTE IRAN'S CONTINUING THREATS AND ITS READINESS TO RESUME WAR; WATCH WHETHER THE MEDIATION REVIVES THE DIPLOMACY; AND BUILD ON THE UAE'S FAVOURABLE POSITION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDREDTH EDITION. DAY 213; SEVEN MONTHS.