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DAY 214, THE 201ST EDITION. THE PROLONGED STANDOFF CONTINUES INTO THE NEW WEEK. THE DIPLOMACY IS STALLED BUT NOT DEAD: TRUMP HAS REJECTED IRAN'S PROPOSAL AND TALKS ARE NOMINALLY EXPECTED TO RESUME, BUT PEZESHKIAN HAS RETURNED TO TEHRAN, NOTHING HAS MOVED, AND DIVISIONS HAVE SURFACED IN TEHRAN OVER WHETHER THE TALKS WERE AUTHORISED. TRUMP WILL NOT RULE OUT FURTHER STRIKES BEFORE THE MIDTERMS. IRAN HAS TIGHTENED ITS SHIPPING ENFORCEMENT (ITS PGSA WARNS SHIPOWNERS AGAINST UNAUTHORISED ROUTES). THE US ESCORT OPERATION AND BLOCKADE CONTINUE; THE STRAIT STAYS NEAR A STANDSTILL. THE GULF CONSOLIDATES AGAINST THE HOUTHIS (KUWAIT AND BAHRAIN CONDEMN THE ATTACKS). THE IRAN-UAE THAW STANDS. NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE PROLONGED STANDOFF IN THE WAR CONTINUES INTO THE NEW WEEK, WITH THE DIPLOMACY STALLED BUT NOT DEAD AND THE ESCALATION RISK PERSISTING. 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 end the war, and although talks are nominally expected to resume this week, nothing has moved: President Pezeshkian has returned to Tehran after the UN General Assembly, Iran continues to insist that the United States lift its blockade first, and divisions have surfaced in Tehran over whether the talks were authorised. President Trump has said he believes the war will be won very soon but will not rule out further strikes on Iran before the November midterm elections, which keeps the escalation risk live even as the United States judges it can afford to wait. Iran has tightened its shipping enforcement, its Persian Gulf Strait Authority warning shipowners against using unauthorised routes and threatening consequences, and its threats to US ships in the Indian Ocean and to Gulf airports stand. The US escort operation and naval blockade continue, and on the second front the Gulf states, Kuwait and Bahrain among them, have condemned fresh Houthi attacks on Saudi Arabia. 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 STANDOFF CONTINUES: THE CHANNEL REMAINS OPEN, BUT NOTHING HAS MOVED. The picture is a continuation of the prolonged standoff, with the diplomacy alive on paper but static in practice. On the side that keeps a channel open: talks are nominally expected to resume this week, Iran says it remains open to diplomacy and willing to discuss limits on its nuclear programme, the Iran-Oman safe-route understanding is in place, and Russia has offered to help stabilise the Strait and the wider Gulf. On the static and harder side: President Trump has rejected Iran's proposal and will not rule out further strikes before the midterms, President Pezeshkian

has returned to Tehran with nothing agreed, Iran insists the blockade be lifted first and has tightened its shipping enforcement, and divisions in Tehran over whether the talks were authorised complicate any deal. The Strait remains near a standstill, the blockade continues, and the Houthi campaign against Saudi Arabia grinds on. The net picture is unchanged from recent days: a war settled into a prolonged standoff, the channel open but the momentum absent.

⚠ **ASSESSMENT:** A STANDOFF THAT COULD RUN, OR BREAK EITHER WAY. THE ALERT STAYS AT MAXIMUM. The war remains in the prolonged standoff described in recent editions, and nothing in the latest period has shifted it. The diplomacy is stalled but not closed: a channel remains, but neither side has moved, and President Trump's suggestion that a deal could wait until after the midterms indicates the United States is in no hurry. Two risks keep the alert at MAXIMUM. First, the escalation risk: President Trump will not rule out further strikes on Iran before the midterms, and a US strike remains the principal trigger for the widening that Iran warns of, against US ships in the Indian Ocean and against Gulf airports. Second, the persistence of the closure: the Strait remains near a standstill, the blockade continues, and Iran has tightened its shipping enforcement, so the disruption endures whether or not the diplomacy revives. For the UAE, a prolonged standoff means persistent disruption, the Gulf airports threat stands, and the Iran-UAE thaw remains 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 214, THE PROLONGED STANDOFF CONTINUES

The prolonged standoff in the war continues into the new week, with the diplomacy stalled but not dead and the escalation risk persisting; 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 end the war, and although talks are nominally expected to resume this week, nothing has moved in the latest period: President Pezeshkian has returned to Tehran after the UN General Assembly, Iran continues to insist that the United States lift its naval blockade first, and divisions have surfaced in Tehran over whether the indirect talks were authorised. President Trump has said he believes the war will be won very soon, while acknowledging that additional military strikes on Iran before the November midterm elections are possible, which keeps the escalation risk live even as the United States judges it can afford to wait, having routed oil around the Strait and kept prices from spiking. Iran has tightened its shipping enforcement, its Persian Gulf Strait Authority warning shipowners against using unauthorised routes through the Gulf and the Strait and threatening consequences for non-compliant companies, and its threats to target US ships in the Indian Ocean and to render Gulf airports unable to function stand. The US escort operation continues, with vessels guided out of the Strait under military supervision, and the naval blockade continues, with well over one hundred commercial vessels redirected. On the second front, the Gulf states, Kuwait and Bahrain among them, have condemned fresh Houthi missile attacks on Saudi Arabia, which the Saudi-led coalition said it intercepted, and Russia has offered to help stabilise the Strait and the wider Gulf. 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 Tuesday 29 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The prolonged standoff continues. Complete departures; high readiness; suspend all Strait transits.
Diplomacy	**STALLED BUT NOT DEAD.** Trump rejected Iran's proposal; talks nominally to resume this week, but Pezeshkian is back in Tehran and nothing has moved. Divisions in Tehran over authorisation.

Escalation risk	**LIVE.** Trump will not rule out further strikes on Iran before the midterms, though he judges the US can afford to wait.
Iran shipping stance	**TIGHTENED.** Iran's PGSA warns shipowners against unauthorised routes. The threats to US ships in the Indian Ocean and to Gulf airports stand.
Strait and oil	**NEAR A STANDSTILL.** The blockade continues (well over 100 vessels redirected); the US escort operation continues; oil around $104 a barrel.
Yemen and the Gulf	**GULF CONDEMNS THE HOUTHIS.** Kuwait and Bahrain condemn fresh Houthi attacks on Saudi Arabia (intercepted). Turkey and Pakistan back Saudi Arabia.
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 prolonged standoff continues, and nothing in the latest period has shifted it. The diplomacy is stalled but not closed, the escalation risk is live, and the closure endures. The alert stays at MAXIMUM with high readiness. Clients should plan for the disruption to persist, note the escalation risk, and watch for the diplomacy to revive or break.

2. THE DIPLOMACY STALLED BUT NOT DEAD: TALKS NOMINALLY TO RESUME, PEZESHKIAN BACK IN TEHRAN

- **Trump has rejected the proposal:** President Trump has rejected Iran's latest proposal, under which Iran would reopen the Strait and resume nuclear talks within seven days if the United States lifted its naval blockade, waived sanctions on Iranian oil sales, and observed a ceasefire including Lebanon; the rejection leaves the concrete diplomatic path rebuffed, and the US continues to judge Iran's terms unacceptable.
- **Talks nominally to resume, but nothing has moved:** Although President Trump has said he expects talks to resume this week, nothing has moved in the latest period, and no date or format has been confirmed; the expectation indicates his rejection was of Iran's specific terms rather than of diplomacy, but it has not translated into progress, and the momentum has gone out of the process.
- **Pezeshkian has returned to Tehran:** President Pezeshkian has left New York and returned to Tehran after the UN General Assembly; in his address and since, he has said Iran remains engaged in negotiations and willing to discuss limits on its nuclear programme, while insisting that Washington move first by lifting the blockade, and he has restated that Iran will not bow to American pressure.
- **Divisions in Tehran:** Divisions have surfaced in Tehran over whether the indirect talks at the assembly were authorised, and Iranian hardliners have criticised the contact; the internal opposition complicates any deal, reinforces the sense that Iran is in no hurry to concede, and is a reminder that the Iranian position is not monolithic.
- **Russia offers to help:** Russia's foreign minister has said Moscow is ready to help stabilise the Strait and the wider Gulf, citing the need for trust between the Gulf states, the Arab states, and Iran; the offer adds another external actor to the mediation, alongside Oman, Qatar, Pakistan, and Egypt, though it has not yet produced movement.

WS Assessment: The diplomacy is alive on paper but static in practice: a channel remains, talks are nominally expected to resume, and Iran remains open in principle, but nothing has moved, divisions in Tehran complicate a deal, and the United States is in no hurry. Clients should watch whether the process revives, while holding posture until a deal is reached and the Strait reopens.

3. IRAN TIGHTENS SHIPPING ENFORCEMENT; THE US ESCORT AND BLOCKADE CONTINUE; THE STRAIT NEAR A STANDSTILL

- **Iran tightens shipping enforcement:** Iran's Persian Gulf Strait Authority has warned shipowners against using unauthorised routes through the Gulf and the Strait of Hormuz, threatening consequences for non-compliant shipping companies; the warning tightens Iran's control of the waterway and signals that vessels transiting without Iranian permission remain at risk, reinforcing the closure.
- **Iran's threats stand:** Iran's threats to target US ships in the Indian Ocean if the fighting resumes, and to render Gulf airports unable to function if the Gulf states cooperate against it, stand; both are conditional and, at the time of writing, rhetorical, but they keep the potential theatre of the war wide and the risk to Gulf infrastructure in view.
- **The US escort operation:** The United States has continued to escort commercial vessels out of the Strait under military supervision, with President Trump saying twenty-nine vessels had been guided out; the escort operation keeps a trickle of traffic moving and eases the pressure on supply, but it has not reopened the waterway, which remains near a standstill.
- **The blockade continues:** The US naval blockade of Iranian ports continues, with US Central Command reporting that well over one hundred commercial vessels have been redirected; the blockade remains the core instrument of US pressure on Iran, and its persistence, set against Iran's insistence that it be lifted first, is central to the impasse.
- **Iran contests the US narrative:** Iran's parliament speaker has claimed that financial market prices, and the oil risk premium in particular, prove Washington is misrepresenting who controls the Strait; the claim is part of Iran's effort to contest the US narrative of control, and should be read as messaging rather than as an independent account.

WS Assessment: The Strait remains near a standstill: Iran has tightened its enforcement, the US escort operation keeps only a trickle moving, and the blockade continues. The closure endures regardless of the state of the diplomacy. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed reopening with verified safe passage.

4. THE UAE; THE GULF CONSOLIDATES AGAINST 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 Gulf tanker war remains at a lower intensity, and the recent incidents have been on the Saudi and Yemen front, not near the UAE.
- **The Gulf consolidates against the Houthis:** The Gulf states have hardened against the Houthi campaign: Kuwait and Bahrain have condemned fresh Houthi missile attacks on Saudi Arabia as hostile aggression, the Saudi-led coalition has intercepted ballistic missiles fired toward Taif and Yanbu, Saudi Arabia's crown prince has pressed President Trump to strike the Houthis, and Turkey and Pakistan are joining chief-of-staff talks to support the kingdom. The UAE shares this hardening stance while maintaining its thaw with Iran.
- **The Gulf airports threat a standing concern:** Iran's threat to render Gulf airports, in effect Dubai and Abu Dhabi, unable to function if the Gulf states cooperate against it remains a standing concern for the UAE; 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 refusal to rule out further strikes before the midterms, and Iran's warning that it will widen the war if attacked, mean the risk of a US escalation, and of Iranian retaliation reaching the UAE, persists; a US strike remains the principal trigger for an escalation that could draw the UAE in, even in a prolonged standoff.
- **US security posture:** US security alerts for the region remain in force, with the State Department advising Americans to 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 and Iran tightening its enforcement; the blockade persists, Iran maintains that the Strait will stay closed unless its terms are met, and no phased reopening has begun.
- **Oil around $104:** Oil remains historically elevated, with Brent around $104 a barrel, having risen to $108 during the previous week before easing; the closure keeps prices up, but the success of Gulf and US efforts to route oil around the Strait has kept them from spiking past $100 for a sustained period, and the market has adapted.
- **Gulf producers bypassing the Strait:** Gulf producers continue to bypass the blockaded Strait, the UAE through Fujairah and Saudi Arabia through Oman's Sohar port and the recovering East-West pipeline, with the United States operating an escort operation and vessels in the Indian Ocean to enforce its blockade; the routing of oil around the Strait keeps the market supplied, though far below the pre-war norm.
- **The Yemen front:** The Houthi campaign against Saudi Arabia continues, with fresh missile attacks intercepted by the Saudi-led coalition, the Bab el-Mandeb closed to Saudi-flagged tankers, and the Houthis holding Yemen's Red Sea coast; a Saudi-Houthi truce has been proposed but not agreed, and Turkey and Pakistan are joining talks to support Saudi Arabia, but 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 near a standstill and oil elevated but below the spike level, with the market adapted to the closure and a prolonged closure now the working assumption. 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 standoff continues, but no confirmed strike on UAE territory.** The prolonged standoff continues, the diplomacy stalled but not dead and the escalation risk live, 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 standoff is prolonged, the Strait remains near a standstill, and President Trump's refusal to rule out a strike on Iran, which Iran 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 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, and Iran has tightened its enforcement and 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.
- **Plan for a prolonged standoff; build on the UAE's position.** With the diplomacy stalled and a prolonged standoff the working assumption, plan for a protracted period of disruption; the 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 Standoff Continuing

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The prolonged standoff continues, the diplomacy stalled but not dead, the escalation risk live, and the Strait near a standstill. 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 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 the working assumption, 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 diplomacy revives, 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 and 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 to 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 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 prolonged standoff continues, the diplomacy stalled but not dead, the escalation risk live, 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 prolonged standoff continues.** President Trump has rejected Iran's proposal, and although talks are nominally expected to resume, Pezeshkian is back in Tehran, nothing has moved, and divisions have surfaced in Tehran over authorisation. Trump will not rule out further strikes before the midterms. Iran has tightened its shipping enforcement (its PGSA warns shipowners against unauthorised routes). The US escort operation and blockade continue; the Strait stays near a standstill. The Gulf condemns the Houthis. There is no confirmed strike on UAE territory.
- **PLAN FOR A PROLONGED STANDOFF.** With the diplomacy stalled, both sides hardening, and the United States judging it can afford to wait, a prolonged standoff is the working assumption. Plan for a protracted period of disruption, the closed Strait and the threat environment, while watching for the diplomacy to revive or break.
- **NOTE THE ESCALATION RISK AND IRAN'S THREATS.** President Trump will not rule out further strikes before the midterms, and a US strike remains the principal trigger for the widening Iran warns of, against US ships in the Indian Ocean and against Gulf airports. Note the escalation risk, 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, talks are nominally expected to resume, and Russia has offered to help; a de-escalation is not impossible if the momentum can be recovered. Watch for the diplomacy to revive, while holding posture until the Strait reopens.
- **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 diplomacy revives or breaks; (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 continues. 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 hundred and first edition.** Day 214 of the war.

8. KEY POINTS

- **THE PROLONGED STANDOFF CONTINUES.** The war remains in the prolonged standoff of recent days, and nothing in the latest period has shifted it. President Trump has rejected Iran's proposal, and although talks are nominally expected to resume this week, President Pezeshkian has returned to Tehran, nothing has moved, and divisions have surfaced in Tehran over whether the talks were authorised. The diplomacy is stalled but not dead.
- **THE ESCALATION RISK IS LIVE.** President Trump has said the war will be won very soon but will not rule out further strikes on Iran before the November midterm elections, even as the United States judges it can afford to wait. A US strike remains the principal trigger for the widening Iran warns of, against US ships in the Indian Ocean and against Gulf airports, and the escalation risk keeps the alert at MAXIMUM.
- **IRAN HAS TIGHTENED ITS SHIPPING ENFORCEMENT; THE STRAIT STAYS NEAR A STANDSTILL.** Iran's Persian Gulf Strait Authority has warned shipowners against using unauthorised routes through the Gulf and the Strait, threatening consequences. The US escort operation keeps only a trickle moving (twenty-nine vessels guided out), the blockade continues (well over one hundred vessels redirected), and the Strait remains near a standstill, with oil around $104. The closure endures regardless of the diplomacy.
- **THE GULF CONSOLIDATES AGAINST THE HOUTHIS.** Kuwait and Bahrain have condemned fresh Houthi missile attacks on Saudi Arabia, which the Saudi-led coalition intercepted; Saudi Arabia's crown prince has pressed President Trump to strike the Houthis; and Turkey and Pakistan are joining chief-of-staff talks to support the kingdom. The Gulf states are hardening against the Houthi campaign while pursuing de-escalation with Iran.
- **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 recent incidents have been on the Saudi and Yemen front. 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 HUNDRED AND FIRST EDITION. DAY 214.** The prolonged standoff continues, the diplomacy stalled but not dead, the escalation risk live, and the Strait near a standstill; 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 29th September 2026. Information current as of 09:00 GMT.

THE PROLONGED STANDOFF IN THE WAR CONTINUES INTO THE NEW WEEK, WITH NOTHING IN THE LATEST PERIOD SHIFTING IT. THE DIPLOMACY IS STALLED BUT NOT DEAD: PRESIDENT TRUMP HAS REJECTED IRAN'S PROPOSAL, AND ALTHOUGH TALKS ARE NOMINALLY EXPECTED TO RESUME THIS WEEK, PRESIDENT PEZESHKIAN HAS RETURNED TO TEHRAN, NOTHING HAS MOVED, AND DIVISIONS HAVE SURFACED IN TEHRAN OVER WHETHER THE TALKS WERE AUTHORISED. PRESIDENT TRUMP WILL NOT RULE OUT FURTHER STRIKES ON IRAN BEFORE THE MIDTERMS, WHICH KEEPS THE ESCALATION RISK LIVE.

IRAN HAS TIGHTENED ITS SHIPPING ENFORCEMENT (ITS PERSIAN GULF STRAIT AUTHORITY WARNS SHIPOWNERS AGAINST UNAUTHORISED ROUTES), AND ITS THREATS TO US SHIPS IN THE INDIAN OCEAN AND TO GULF AIRPORTS STAND. THE US ESCORT OPERATION AND BLOCKADE CONTINUE, AND THE STRAIT REMAINS NEAR A STANDSTILL, WITH OIL AROUND $104. THE GULF STATES, KUWAIT AND BAHRAIN AMONG THEM, HAVE CONDEMNED FRESH HOUTHI ATTACKS ON SAUDI ARABIA. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE; THE IRAN-UAE THAW

STANDS. MAXIMUM ALERT HELD, HIGH READINESS. COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

PLAN FOR A PROLONGED STANDOFF; NOTE THE ESCALATION RISK AND IRAN'S THREATS; WATCH WHETHER THE DIPLOMACY REVIVES OR BREAKS; AND BUILD ON THE UAE'S FAVOURABLE POSITION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND FIRST EDITION. DAY 214.