WESTMINSTER SECURITY

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DAY 215, THE 202ND EDITION. THE STANDOFF CONTINUES, WITH A MODEST DIPLOMATIC PULSE BUT IRAN HARDENING. DESPITE TRUMP'S PUBLIC REJECTION, IRAN HAS RECEIVED US FEEDBACK ON ITS SEVEN-DAY PROPOSAL VIA QATARI MEDIATORS IN DOHA AND ARAGHCHI IS CONSULTING IN TEHRAN; TEHRAN EXPECTS A US RESPONSE. BUT TRUMP SAYS HE DID NOT OFFER SANCTIONS RELIEF, IRAN CALLS ITS NEW ORDER IN THE STRAIT IRREVERSIBLE AND WILL HOLD WARTIME DRILLS, AND A TANKER HEADING INTO THE STRAIT WAS STRUCK BY AN UNKNOWN PROJECTILE (AT SEA, NOT NEAR THE UAE). THE GULF COORDINATES (MBS AND THE UAE VP MEET). THE STRAIT STAYS NEAR A STANDSTILL. THE IRAN-UAE THAW STANDS. NO CONFIRMED STRIKE ON UAE TERRITORY. MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

30 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE PROLONGED STANDOFF CONTINUES, WITH A MODEST DIPLOMATIC PULSE SET AGAINST A HARDENING IRANIAN POSTURE AND A FRESH TANKER STRIKE IN THE STRAIT. THE STRAIT REMAINS NEAR A STANDSTILL AND THE ALERT REMAINS AT MAXIMUM. Despite President Trump's public rejection of Iran's proposal, the indirect channel is active: Iran's foreign minister, Araghchi, received US feedback on Tehran's seven-day proposal during a meeting with Qatari mediators in Doha and will discuss it in Tehran, and Tehran says it expects a US response. But no breakthrough has been reached: President Trump has said he did not offer Iran sanctions relief, an Iranian official has called the new Iranian order in the Strait irreversible, Iran has not exempted Iraqi tankers from its navigation restrictions, and Iran will soon hold drills to prepare its civilian infrastructure for wartime threats. A tanker heading into the Strait of Hormuz has been struck by an unknown projectile, according to UKMTO. This is a vessel at sea in the Strait, not near the UAE and with the cause unconfirmed. On the diplomatic margin, Saudi Arabia's crown prince and the UAE vice president have met, and the Gulf states continue to coordinate. 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:** A DIPLOMATIC PULSE AGAINST A HARDENING POSTURE. The picture remains the prolonged standoff, but with a modest pulse in the diplomacy set against a hardening Iranian posture. On the pulse side: the indirect channel is active, with Iran receiving US feedback on its seven-day proposal through Qatari mediators and consulting in Tehran, and Tehran expecting a US response; the mediation continues, and Iran's proposal has not been withdrawn. On the harder side: President Trump has said he did not offer Iran sanctions relief and has not accepted Iran's terms, an Iranian official has called the new order in the Strait irreversible, Iran has not exempted Iraqi tankers and will hold wartime-readiness drills, and a tanker has been struck in the Strait. The net

picture is a standoff in which the channel is not only open but exchanging feedback, yet Iran is simultaneously entrenching its control and both sides remain far apart. A pulse is not a breakthrough.

⚠ **ASSESSMENT:** A PULSE, NOT A BREAKTHROUGH. THE ALERT STAYS AT MAXIMUM. The exchange of US feedback on Iran's proposal, and Iran's consultation in Tehran, are a modest and welcome sign that the diplomacy is not dead, and that the public rejection did not close the channel. But they should not be over-read. President Trump has said he did not offer sanctions relief, and no terms have been agreed; Iran is hardening in parallel, calling its order in the Strait irreversible and preparing for wartime; and a tanker has been struck in the Strait, a reminder that the waterway remains hostile. The underlying reality is unchanged: the Strait is near a standstill, the blockade continues, and the parties remain far apart on sequencing. For the UAE, the meeting between Saudi Arabia's crown prince and the UAE vice president reflects continued Gulf coordination, and the Iran-UAE thaw is a mitigating factor; but the Gulf airports threat and the risk of a US escalation keep the danger elevated. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 215, A DIPLOMATIC PULSE, BUT IRAN HARDENS

The prolonged standoff continues, with a modest pulse in the diplomacy set against a hardening Iranian posture and a fresh tanker strike in the Strait; the Strait remains near a standstill and the alert remains at MAXIMUM. Despite President Trump's public rejection of Iran's proposal, the indirect channel is active: Iran's foreign minister, Araghchi, received US feedback on Tehran's seven-day proposal during a meeting with Qatari mediators in Doha on Tuesday night, according to an official briefed on the talks, and will discuss it in Tehran, and Tehran has said it expects a US response to the proposal. But no breakthrough has been reached, and the parties remain far apart: President Trump has said he did not offer Iran sanctions relief and has denied Iranian characterisations of the talks, an Iranian official has called the new Iranian order in the Strait of Hormuz irreversible, Iran has not exempted Iraqi tankers from its navigation restrictions, and Iran will soon hold drills to prepare its civilian infrastructure for wartime threats. A tanker heading into the Strait of Hormuz has been struck by an unknown projectile, according to the United Kingdom Maritime Trade Operations, citing a verified source; this is a vessel at sea in the Strait, with the cause unconfirmed, not a strike on UAE territory and not near the UAE, but it underlines that the waters of the Strait remain hostile. On the diplomatic margin, Saudi Arabia's crown prince and the UAE vice president have met, the Gulf states continue to coordinate on the war and on the Houthi campaign, and Oman has reaffirmed its commitment to safeguarding navigation in the Strait. 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 Wednesday 30 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The standoff continues, a pulse but no breakthrough. Complete departures; high readiness; suspend all Strait transits.
Diplomatic pulse	**US FEEDBACK EXCHANGED.** Iran received US feedback on its seven-day proposal via Qatari mediators in Doha; Araghchi consulting in Tehran; Tehran expects a US response. The channel is active.
But no breakthrough	**FAR APART.** Trump says he did not offer sanctions relief and has not accepted Iran's terms. No sequencing deal. A pulse is not a breakthrough.
Iran's posture	**HARDENING.** An Iranian official calls the new order in the Strait irreversible; no Iraqi tanker exemption; Iran to hold wartime-readiness drills.

Strait incident	**TANKER STRUCK.** A tanker heading into the Strait was struck by an unknown projectile (UKMTO). A vessel at sea, cause unconfirmed, not near the UAE. The Strait stays near a standstill.
Yemen and the Gulf	**GULF COORDINATES.** Saudi Arabia's crown prince and the UAE vice president meet. The UN envoy calls the Houthi escalation "unprecedented." The Saudi pipeline remains shut.
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 standoff continues, with a modest pulse in the diplomacy, the exchange of US feedback on Iran's proposal, set against Iran's hardening and a fresh tanker strike in the Strait. The pulse is welcome but is not a breakthrough, and the underlying reality is unchanged. The alert stays at MAXIMUM with high readiness. Clients should note the pulse without over-reading it, and plan for the disruption to persist.

2. A MODEST DIPLOMATIC PULSE: US FEEDBACK ON IRAN'S PROPOSAL, ARAGHCHI CONSULTING IN TEHRAN

- **US feedback conveyed:** Iran's foreign minister, Araghchi, received US feedback on Tehran's seven-day proposal during a meeting with Qatari mediators in Doha on Tuesday night, according to an official briefed on the talks, and will discuss it in Tehran; the exchange of feedback indicates that President Trump's public rejection did not close the channel, and that the indirect process is continuing.
- **Tehran expects a US response:** Tehran has said it expects a US response to its ceasefire proposal, under which Iran would reopen the Strait and resume nuclear talks within seven days if the United States lifted its blockade, waived sanctions on Iranian oil sales, and observed a ceasefire including Lebanon; the proposal has not been withdrawn, and the parties are still communicating through mediators.
- **But Trump says no sanctions relief:** President Trump has said he did not offer Iran sanctions relief, and has denied Iranian characterisations of the talks; the clarification hardens the US position and indicates that, whatever feedback has been exchanged, Washington has not moved toward Iran's core demands, and that the gap on terms remains.
- **The mediation continues:** Oman has reaffirmed its commitment to safeguarding navigation in the Strait, Qatar, Pakistan and others continue their de-escalation efforts, and Russia has offered to help stabilise the Gulf; the mediation is active, and the exchange of feedback shows it is producing communication, even as the principals remain far apart on the substance.
- **A pulse, not a breakthrough:** The exchange of feedback is a modest and welcome sign that the diplomacy is not dead, but it is not a breakthrough: no terms have been agreed, President Trump has not accepted Iran's demands, and Iran is hardening in parallel; the process is limping forward, not accelerating toward a deal.

WS Assessment: The exchange of US feedback on Iran's proposal, and Iran's consultation in Tehran, are a welcome sign that the channel is active, and slightly more than the static picture of recent days. But it is a pulse, not a breakthrough; clients should watch whether it develops, while holding posture until terms are agreed and the Strait reopens.

3. BUT IRAN HARDENS, AND A TANKER IS STRUCK IN THE STRAIT

- **Iran calls its Strait order irreversible:** An Iranian official has said the new Iranian order in the Strait of Hormuz is irreversible; the assertion signals that Iran regards its control of the waterway as a settled fact and intends to maintain it, which complicates any reopening that does not meet Iran's terms and sits awkwardly against the diplomatic pulse.
- **Iran maintains and enforces its restrictions:** Iran has not exempted Iraqi tankers from its navigation restrictions in the Strait, according to Iraq's parliament speaker, and Iran's shipping authority has warned shipowners against unauthorised routes; Iran is maintaining and enforcing its control of the waterway, not easing it, even as feedback is exchanged.
- **Iran prepares for wartime:** Iran will soon hold drills to prepare its civilian infrastructure for wartime threats, according to the head of its Passive Defense Organization; the preparation indicates that Iran is bracing for continued or renewed conflict, consistent with its stated readiness to resume war, and is a reminder that the pulse in the diplomacy has not lowered the temperature.
- **A tanker struck in the Strait:** A tanker heading into the Strait of Hormuz has been struck by an unknown projectile, according to the United Kingdom Maritime Trade Operations, citing a verified source; this is a vessel at sea in the Strait, with the cause unconfirmed, not a strike on UAE territory and not near the UAE, but it underlines that the waters of the Strait remain hostile and reinforces the advice to suspend all Strait transits.
- **Iran contests the US narrative:** Iran's parliament speaker has continued to claim that market prices show Washington is misrepresenting who controls the Strait, and Iranian officials assert they are present in the Strait with strength; the messaging is part of Iran's effort to project control, and should be read as such rather than as an independent account.

WS Assessment: Iran is hardening in parallel with the diplomatic pulse: it calls its order in the Strait irreversible, maintains and enforces its restrictions, and is preparing for wartime, and a tanker has been struck in the Strait. The pulse and the hardening sit side by side; clients should weigh the pulse against the hardening and hold posture.

4. THE UAE; THE GULF COORDINATES; 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 tanker struck in the latest period was at sea in the Strait, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The Gulf coordinates:** Saudi Arabia's crown prince and the UAE vice president have met, and the Gulf states continue to coordinate on the war and on the Houthi campaign; the meeting reflects the Gulf's continued diplomatic engagement, in which the UAE, with its thaw with Iran and its pragmatic posture, is well placed to help shape the regional response.
- **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 readiness to resume war and its 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.
- **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, its thaw with Iran and pragmatic posture may shield it, and the Gulf coordination in which it is engaged is a stabilising factor; but the Gulf airports threat 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, a tanker struck:** The Strait of Hormuz remains near a standstill, with a tanker heading into the Strait struck by an unknown projectile and Iran maintaining and enforcing its restrictions; the blockade persists, Iran calls its order in the Strait irreversible, and no phased reopening has begun.
- **Oil elevated:** Oil remains historically elevated, with the closure keeping prices up, though the routing of oil around the Strait has kept them from spiking past $100 for a sustained period; a bridging of the impasse and a reopening would ease prices, while a US escalation or a serious incident in the Strait would drive them higher.
- **Energy workarounds continue:** With the Strait closed, energy workarounds continue: Gulf producers route oil around the Strait, the UAE through Fujairah and Saudi Arabia through its alternative routes, and Iraqi fuel has been loaded at a Syrian port to meet regional demand; the Saudi East-West pipeline, shut after drone attacks Saudi Arabia blamed on Iran-backed militias in Iraq, remains a factor in the supply picture.
- **The Yemen front:** The Houthi campaign against Saudi Arabia continues, with the UN envoy describing the escalation as unprecedented, the Houthis holding Yemen's Red Sea coast and maintaining their blockade of Saudi shipping, and the Saudi-led coalition intercepting attacks; a Saudi-Houthi truce has been proposed but not agreed, and Turkey and Pakistan are supporting 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, a tanker has been struck, and oil is elevated but below the spike level, with the market adapted to the closure. 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 pulse but no breakthrough, and no confirmed strike on UAE territory.** The standoff continues, with a modest diplomatic pulse set against Iran's hardening and a fresh tanker strike in the Strait, and 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, the UAE's pragmatic posture and the Gulf coordination in which it is engaged 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, is preparing for wartime, 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. A TANKER HAS BEEN STRUCK.** The Strait of Hormuz remains near a standstill, a tanker heading into it has been struck by an unknown projectile, and Iran maintains its restrictions and 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 pulse, but do not over-read it; build on the UAE's position.** Whether the exchange of feedback develops into a genuine negotiation is the key thing to watch; a pulse is not a breakthrough, and Iran is hardening in parallel. The Iran-UAE thaw, the UAE's pragmatic posture and the Gulf coordination place it well and may shield its airports; build on them while holding posture.

Return Guidance: MAXIMUM Held, High Readiness, a Pulse but No Breakthrough

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The standoff continues, with a modest diplomatic pulse but no breakthrough, Iran hardening in parallel, and a tanker struck in the Strait. 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 pulse in the diplomacy with 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 pulse develops into a negotiation, 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 development of the pulse into a genuine negotiation 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 channel is active but no terms are agreed; 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 serious incident in the Strait, 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 standoff continues, a modest pulse but no breakthrough, Iran hardening, a tanker struck in the Strait, but the mediation channel active 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. A pulse, but no breakthrough.** Despite President Trump's public rejection, Iran has received US feedback on its seven-day proposal via Qatari mediators in Doha and Araghchi is consulting in Tehran; Tehran expects a US response. But Trump says he did not offer sanctions relief, Iran calls its new order in the Strait irreversible and will hold wartime drills, and a tanker heading into the Strait has been struck by an unknown projectile (at sea, not near the UAE). The Gulf coordinates (MBS and the UAE VP meet). The Strait stays near a standstill. There is no confirmed strike on UAE territory.
- **WATCH THE PULSE, BUT DO NOT OVER-READ IT.** The exchange of US feedback on Iran's proposal is a welcome sign the channel is active, and slightly more than the static picture of recent days; but no terms are agreed, Trump has not moved toward Iran's demands, and Iran is hardening. Watch whether the pulse develops into a negotiation, while holding posture.
- **NOTE IRAN'S HARDENING AND THE TANKER STRIKE.** Iran calls its order in the Strait irreversible, maintains and enforces its restrictions, and is preparing for wartime; a tanker has been struck in the Strait. The waters remain hostile; treat the Strait as closed and suspend all transits.
- **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. Hold high readiness, and, on the airports threat, avoid actions Iran could construe as cooperation.
- **BUILD ON THE UAE'S FAVOURABLE THREADS AND THE GULF COORDINATION.** The Iran-UAE thaw, the Fujairah route, the UAE's pragmatic posture, and the Gulf coordination in which it is engaged 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 pulse develops into a negotiation or the diplomacy 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 pulse but no breakthrough. Emergency updates to follow.** Westminster Security will issue immediate updates on any development 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 second edition.** Day 215 of the war.

8. KEY POINTS

- **A MODEST DIPLOMATIC PULSE.** Despite President Trump's public rejection, the indirect channel is active: Iran received US feedback on its seven-day proposal through Qatari mediators in Doha and is consulting in Tehran, and Tehran expects a US response. The proposal has not been withdrawn, and the parties are still communicating through mediators. The channel is not dead.
- **BUT NO BREAKTHROUGH, AND THE PARTIES REMAIN FAR APART.** President Trump has said he did not offer Iran sanctions relief and has not accepted Iran's terms; no sequencing deal has been reached. The exchange of feedback is a welcome sign, and slightly more than the static picture of recent days, but it is a pulse, not a breakthrough.
- **IRAN HARDENS IN PARALLEL.** An Iranian official has called the new order in the Strait of Hormuz irreversible, Iran has not exempted Iraqi tankers from its navigation restrictions, and Iran will soon hold drills to prepare its civilian infrastructure for wartime threats. Iran is entrenching its control and bracing for continued conflict, even as feedback is exchanged.
- **A TANKER IS STRUCK IN THE STRAIT.** A tanker heading into the Strait of Hormuz has been struck by an unknown projectile, according to UKMTO. This is a vessel at sea in the Strait, with the cause unconfirmed, not a strike on UAE territory and not near the UAE, but it underlines that the waters of the Strait remain hostile and reinforces the advice to suspend all Strait transits.
- **NO CONFIRMED STRIKE ON UAE TERRITORY. THE GULF COORDINATES.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. Saudi Arabia's crown prince and the UAE vice president have met, and the Gulf states continue to coordinate. The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, and the Fujairah route keep the UAE relatively favourably placed; but Iran's threat to Gulf airports names the UAE's critical infrastructure, and the risk of a US escalation persists. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS. NO CONFIRMED STRIKE ON UAE TERRITORY. TWO HUNDRED AND SECOND EDITION. DAY 215.** The standoff continues, with a modest diplomatic pulse but no breakthrough, Iran hardening, and a tanker struck in the Strait; 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 30th September 2026. Information current as of 09:00 GMT.

THE PROLONGED STANDOFF CONTINUES, WITH A MODEST DIPLOMATIC PULSE SET AGAINST A HARDENING IRANIAN POSTURE. DESPITE PRESIDENT TRUMP'S PUBLIC REJECTION, THE INDIRECT CHANNEL IS ACTIVE: IRAN HAS RECEIVED US FEEDBACK ON ITS SEVEN-DAY PROPOSAL VIA QATARI MEDIATORS IN DOHA AND ARAGHCHI IS CONSULTING IN TEHRAN, AND TEHRAN EXPECTS A US RESPONSE. BUT NO BREAKTHROUGH HAS BEEN REACHED: PRESIDENT TRUMP SAYS HE DID NOT OFFER SANCTIONS RELIEF, AN IRANIAN OFFICIAL CALLS THE NEW ORDER IN THE STRAIT IRREVERSIBLE, IRAN HAS NOT EXEMPTED IRAQI TANKERS AND WILL HOLD WARTIME DRILLS, AND A TANKER HEADING INTO THE STRAIT HAS BEEN STRUCK BY AN UNKNOWN PROJECTILE.

THE TANKER STRIKE IS A VESSEL AT SEA IN THE STRAIT, CAUSE UNCONFIRMED, NOT NEAR THE UAE. ON THE DIPLOMATIC MARGIN, SAUDI ARABIA'S CROWN PRINCE AND THE UAE VICE PRESIDENT HAVE MET, AND THE GULF STATES CONTINUE TO COORDINATE. THE STRAIT STAYS NEAR A STANDSTILL. 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.

WATCH THE PULSE BUT DO NOT OVER-READ IT; NOTE IRAN'S HARDENING AND THE TANKER STRIKE; NOTE THE ESCALATION RISK AND IRAN'S THREATS; AND BUILD ON THE UAE'S FAVOURABLE POSITION AND THE GULF COORDINATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. TWO HUNDRED AND SECOND EDITION. DAY 215.