SECURITY UPDATE / MIDDLE EAST & IRAN CONFLICT

Maritime Escalation in the Iran Conflict

Bab el-Mandeb fatalities, Houthi expansion and U.S. blockade pressure

Assessing the dual-chokepoint maritime threat, the renewed Saudi-Houthi confrontation, and the cumulative strategic effect of sustained U.S. economic pressure on Iran.

FOCUS

Bab el-Mandeb | Houthi-Saudi escalation | U.S. blockade

Strait of Hormuz | Iranian proxy support | Regional maritime risk

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EXECUTIVE ASSESSMENT

Executive Summary

The maritime dimension of the Iran conflict has entered a more dangerous phase. The most significant change is the fatal Houthi attack on the Egyptian-owned cargo vessel Tihamah in the Bab el-Mandeb Strait on 11 August. Yemeni authorities reported that four crew members - three Pakistani nationals and one Indonesian - were killed, together with two members of the government-aligned National Resistance Forces involved in rescue activity. Ten additional personnel were reported injured. This is the first confirmed fatal Houthi attack on commercial shipping during the current Iran conflict and materially raises the risk calculation for operators using the southern Red Sea.

The incident is especially significant because the vessel was struck again after rescue forces had arrived. Available reporting does not conclusively establish that rescuers were deliberately targeted; however, re-engagement of a damaged commercial vessel while rescue activity was underway demonstrates a willingness to accept a substantially higher probability of secondary casualties. The operational consequence is likely to be broader avoidance behaviour by shipowners, insurers and masters, even where a vessel is not obviously Saudi-owned or Saudi-operated.

The Bab el-Mandeb escalation is occurring in parallel with active U.S. enforcement of the blockade on Iranian ports. On 11 August, a U.S. Navy MH-60 helicopter fired two Hellfire missiles at the Panama-flagged Vela Nova after the vessel ignored repeated warnings while proceeding toward an Iranian port. The vessel's steering was disabled approximately 71 nautical miles from Pakistan and no casualties were reported. U.S. authorities describe the action as the latest in a series of interdictions since the blockade was first imposed in April. The maritime confrontation is therefore intensifying at both strategic chokepoints: Houthi action around Bab el-Mandeb and Iranian/U.S. coercive action around Hormuz and the Gulf of Oman.

The broader assessment is that a sustained U.S. blockade remains one of Washington's strongest forms of leverage over Tehran because its economic effect compounds with time. During the first enforcement phase in April, Iranian seaborne exports fell by more than 80% over comparable periods, while 41 tankers carrying an estimated 69 million barrels were reported unable to sell their cargoes. After the blockade was reimposed on 14 July, current reporting indicates Iranian loadings have again fallen sharply from pre-war levels. The blockade will not produce an immediate political capitulation, and its effects are accompanied by substantial global energy and escalation costs. However, if maintained and tied to a credible diplomatic off-ramp, it progressively constrains foreign-currency earnings, storage, production, military regeneration and Tehran's ability to finance regional partners.

For the Houthi issue, the immediate picture is one of continued Iranian support rather than demonstrated decline. Reporting in July indicated the transfer of IRGC personnel, advisers, missile and drone components and financial resources to Yemen. Over the medium term, however, sustained pressure on Iranian revenue should increasingly force prioritisation between domestic expenditure, conventional military requirements and external proxy support. Houthi capability is therefore unlikely to collapse suddenly, but the volume and sophistication of Iranian support should become progressively more difficult to sustain if the blockade remains effective for several months.

KEY ASSESSMENT FACTORS

- **The 11 August Tihamah attack is a threshold event: commercial mariners and rescuers have now been killed in the Bab el-Mandeb during the current conflict, increasing the probability of wider commercial avoidance and higher war-risk premiums.**
- **The Houthi campaign is no longer limited to symbolic support for Iran. It has reactivated the Saudi-Houthi confrontation, targeted Saudi-linked shipping and infrastructure, and placed the Red Sea export route under direct pressure at the same time Hormuz remains heavily disrupted.**
- **Iranian support to the Houthis remains active in the near term. A meaningful decline should be expected only gradually if Iran continues to lose export revenue and if specialised components, advisers and financing become harder to move.**
- **The U.S. blockade is demonstrably constraining Iranian exports. Its coercive value increases with duration because storage saturation, reduced production, foreign-exchange shortages and regeneration costs accumulate rather than reset each day.**
- **The most advantageous U.S. negotiating position is to retain blockade relief as a high-value, reversible concession linked to verifiable reopening of Hormuz and substantive nuclear concessions, while avoiding unnecessary expansion of military action that could erode political support or widen the conflict.**

MARITIME INCIDENT

1. Fatal Escalation in the Bab el-Mandeb - 11 August 2026

The attack on Tihamah represents the clearest escalation in the Red Sea maritime threat since the current Iran conflict began on 28 February. Yemeni authorities stated that the vessel was struck by Houthi ballistic missiles in the Bab el-Mandeb area. Four crew members were killed and the ship lost control. Government-aligned rescue forces then approached the casualty, after which another strike occurred, killing two National Resistance Forces personnel and contributing to a total of ten additional injuries among crew and rescuers.

The precise Houthi targeting logic remains uncertain. The group subsequently stated that it had attacked a vessel transporting Saudi military equipment through the Bab el-Mandeb but did not publicly identify the ship. Tihamah was Egyptian-owned and was not reported as Saudi-owned or Saudi-operated. There is no independently confirmed evidence at the time of this update that the vessel was carrying Saudi military cargo. If Tihamah was the vessel intended by the Houthi statement, the incident suggests either inaccurate target identification or a widening definition of what constitutes a Saudi-associated target.

Either explanation increases commercial risk. A shipping company can normally reduce exposure by screening vessel ownership, flag, cargo, charterer and recent port calls. That approach becomes less reliable if Houthi targeting is influenced by alleged cargo associations, indirect Saudi commercial links, previous port activity or imperfect intelligence. The risk therefore extends beyond clearly Saudi-flagged or Saudi-owned ships.

The second strike is equally important. There is insufficient evidence to state that the rescue team itself was deliberately targeted. Nevertheless, the decision to re-engage a damaged merchant vessel after rescue forces had arrived substantially increases the hazard to search-and-rescue assets, nearby vessels and emergency responders. Masters may become less willing to stop near a casualty where the possibility of follow-on attack remains, potentially increasing secondary loss of life after future incidents.

The operational effect is likely to exceed the physical damage caused by a single strike. In a chokepoint such as Bab el-Mandeb, a small number of successful attacks can produce disproportionate disruption by altering insurer behaviour, voyage planning and charter-party decisions. The Houthis therefore do not need to physically close the strait to achieve meaningful strategic effect.

STRATEGIC MARITIME PICTURE

2. Dual-Chokepoint Maritime Pressure

The critical strategic development is the simultaneous deterioration of the two maritime gateways that normally provide redundancy for Gulf energy exports. Iran's restriction of normal traffic through the Strait of Hormuz has already forced Saudi Arabia and other producers to rely more heavily on alternative routes. The Saudi East-West pipeline to Yanbu and onward movement through the Red Sea is one of the most important of those alternatives. Houthi action around Bab el-Mandeb directly targets that redundancy.

	BAB EL-MANDEB / RED SEA	HORMUZ / GULF OF OMAN
Primary pressure	Houthi maritime embargo, missiles and drones against Saudi-linked shipping and Red Sea facilities.	Iranian restriction of Hormuz traffic combined with U.S. blockade enforcement against Iranian ports.
Immediate objective	Raise the cost of Saudi Red Sea exports and demonstrate an ability to threaten the alternative to Hormuz.	Iran seeks leverage through disruption; Washington seeks to deny Iranian export revenue and force political concessions.
Current effect	Lower traffic, higher insurance, route avoidance and slower Yanbu export flows.	Major reduction in normal traffic and sustained pressure on Iranian oil sales and wider Gulf exports.
Assessment	HIGH maritime threat; selective attacks are sufficient to create disproportionate commercial disruption.	HIGH strategic pressure; blockade effectiveness increases with duration but also raises escalation and global energy costs.

Traffic data underline the impact. Gulf crude and condensate exports averaged approximately 10.7 million barrels per day in July, around 40% below pre-war levels. Tanker movements through both Hormuz and Bab el-Mandeb remained well below normal. Saudi loadings from Yanbu fell to around 3 million barrels per day after 20 July from approximately 3.8 million barrels per day during April-June, while some vessels altered routes, switched off AIS transponders or increased use of the Suez/SUMED system to avoid the southern Red Sea.

This creates a strategic linkage between the two theatres. Pressure in Hormuz increases the value of the Red Sea route; pressure in Bab el-Mandeb then reduces the ability of Saudi Arabia to offset disruption in Hormuz. Iran obtains an indirect benefit even when it is not itself conducting the Red Sea attacks. The Houthis, meanwhile, gain political and military relevance by demonstrating that they can impose costs on Saudi Arabia and the global energy system far beyond Yemen's borders.

REGIONAL CONFLICT

3. Re-Emergence of the Saudi-Houthi Proxy Conflict

The current Houthi campaign also marks the breakdown of approximately four years of relative cross-border calm between Saudi Arabia and the movement. The immediate escalation began on 13 July when the runway at Sanaa International Airport was struck to prevent an Iranian Mahan Air flight from landing without authorisation. Yemen's internationally recognised government claimed the action, while the Houthis blamed Saudi Arabia and retaliated with missiles toward the kingdom, including a claimed attack on Abha International Airport. The exchange represented the first claimed Houthi attack on Saudi Arabia since the informal truce established in 2022.

Subsequent reporting gave the flight greater strategic significance. Multiple sources stated that the Mahan Air aircraft carried between 10 and 21 IRGC personnel, including senior commanders and military advisers, together with missile- and drone-related components and gold intended to finance Houthi activity. Iran and Houthi officials disputed the allegations and described the passengers as civilians returning from Iran. The claims cannot be treated as independently proven in every detail, but the reporting is consistent with a broader pattern of renewed Iranian-Houthi operational coordination.

On 20 July, the Houthis declared a maritime embargo against Saudi Arabia. They subsequently claimed attacks on Saudi oil tankers and on oil installations in Red Sea ports. Saudi Arabia responded with strikes on Houthi-controlled military facilities and began seeking wider international cooperation to protect Red Sea shipping. The confrontation then broadened into renewed attacks inside Yemen and on Saudi territory.

During early August, Houthi missiles and drones struck government-aligned positions in Marib and Hadramout, while an attack in Saudi Arabia's Najran Province injured 11 civilians. Saudi authorities publicly warned that Iranian-aligned forces could attempt coordinated attacks from Yemen and Iraq against energy infrastructure, airports and ports. On 9 August, the Houthis claimed a drone strike against Saudi Aramco's Jazan refinery, where a fire was reported and extinguished without casualties. The same day, missile and drone attacks on the government-controlled Red Sea port of Mokha killed seven people and wounded 30, while also causing significant infrastructure damage.

These incidents indicate that the Houthi campaign now operates on three mutually reinforcing lines: maritime pressure on Saudi-linked shipping; direct strikes on Saudi territory and energy assets; and attacks on Yemeni government forces and Red Sea ports. This is materially different from a limited political demonstration. It creates the conditions for the Iran conflict to reactivate the Yemen war as an independent theatre with its own escalation cycle.

4. Internal Houthi Dynamics

The Houthis' external escalation should also be viewed against internal pressure in the territory they control. The prolonged period of 'no war, no peace' after the 2022 truce did not deliver the level of economic improvement expected by much of the population. Salary disputes, high living costs, weak public services and humanitarian hardship have continued, creating pressure on the movement to demonstrate political gains from years of confrontation.

The renewed dispute with Saudi Arabia provides the Houthi leadership with a mechanism for externalising those pressures. The movement portrays restrictions on Yemeni air and maritime access as evidence that Saudi Arabia continues to deny Yemeni sovereignty and economic recovery. The Sanaa airport confrontation and the subsequent maritime embargo have therefore been framed domestically as part of the unfinished Yemen war rather than simply as participation in Iran's regional confrontation with the United States.

This framing is important because it gives the Houthis an independent political rationale for continued escalation even if Tehran later seeks de-escalation. The movement is not best understood as a force that will automatically stop fighting when Iranian support declines. It has its own coercive institutions, local revenue mechanisms, missile and drone expertise, stockpiles, political objectives and territorial ambitions. Iranian support is a force multiplier, not the sole source of Houthi power.

The internal risk is that renewed external confrontation may initially strengthen leadership cohesion by generating nationalist mobilisation, but a prolonged war that worsens economic conditions could eventually deepen dissatisfaction. The balance will depend on whether the Houthis can continue to present escalation as producing concessions from Saudi Arabia while avoiding a large-scale ground campaign that imposes substantial losses on their own forces and population.

PROXY SUPPORT

5. Iranian Support to the Houthis - Strong in the Near Term, More Vulnerable Over Time

There is currently insufficient evidence to conclude that Iranian support to the Houthis has already materially diminished. The July reporting on IRGC personnel, missile and drone components and financial resources instead points to continued or increased support at a moment when Tehran saw the Red Sea as a useful pressure front. The Houthis remain one of Iran's most strategically valuable regional partners because their geography allows them to threaten Bab el-Mandeb and Saudi Red Sea infrastructure at comparatively low cost to Iran.

The medium-term outlook is different. Iranian proxy warfare depends on a combination of money, specialised components, technical expertise, logistics networks and political attention. A sustained reduction in oil revenue progressively increases competition between domestic expenditure, repair of damaged infrastructure, conventional military regeneration and support to external groups. Iran can continue to prioritise the Houthis, but doing so becomes more expensive as the economic base narrows.

The first signs of pressure would most likely appear in the quantity and sophistication of support rather than in a complete break in the relationship. Smaller financial transfers, tighter prioritisation of high-value missile or guidance components, greater reliance on local assembly, reduced availability of specialist advisers and more cautious use of identifiable shipping or air routes are more plausible than an abrupt end to assistance.

Houthi operational capability would also persist after any reduction in Iranian support. The movement has accumulated weapons, technical knowledge and manufacturing experience over more than a decade. Existing inventories and local production could sustain drone and missile attacks for a considerable period. The strategic value of economic pressure on Iran is therefore not that it will quickly switch off the Houthi threat, but that it can reduce Tehran's ability to replace losses, introduce improved systems and sustain repeated high-tempo campaigns indefinitely.

U.S. MARITIME PRESSURE

6. U.S. Blockade of Iranian Ports and Direct Maritime Enforcement

The 11 August Vela Nova incident demonstrates that U.S. enforcement is coercive rather than declaratory. The Panama-flagged vessel was proceeding toward an Iranian port when it reportedly ignored repeated warnings. A U.S. Navy MH-60 helicopter then fired two Hellfire missiles, disabling the vessel's steering in the Gulf of Oman. No casualties were reported. The incident reinforces the expectation among shipowners that attempting to breach the blockade carries a credible risk of interception and, where warnings are ignored, direct military force.

This deterrent effect is central to how a blockade functions. The United States does not need to board or disable every vessel. Once enforcement is credible, insurers, flag states, banks, charterers and shipping companies begin to avoid voyages themselves. The commercial system consequently performs part of the enforcement function without requiring a U.S. military action against every prospective shipment.

The blockade was first imposed in mid-April and was lifted in mid-June during an interim de-escalation arrangement. It was reimposed on 14 July after Iranian attacks on shipping in the Strait of Hormuz resumed and negotiations stalled. The stop-start sequence has created an unusually clear comparison between periods of enforcement and relief, allowing the economic impact to be assessed more confidently than ordinary sanctions alone.

ECONOMIC COERCION

7. How Effective Is the Blockade?

The available evidence indicates that the blockade has been effective at its immediate objective of constraining Iranian seaborne export revenue. During the first enforcement phase, only a handful of Iranian crude carriers were assessed to have left the Gulf of Oman between 13 and 25 April, representing a reduction of more than 80% compared with a comparable period in March. By the end of April, U.S. Central Command stated that 41 tankers carrying approximately 69 million barrels of Iranian oil were unable to sell their cargoes.

The storage effect is strategically important. Oil that cannot be sold must remain in onshore tanks, be transferred into floating storage or force production to be reduced. By late April, Iranian onshore crude stocks were assessed at more than 50 million barrels against roughly 86 million barrels of capacity, while additional tankers were being used as floating storage. Once storage becomes constrained, the problem moves upstream: production has to slow, facilities operate below efficient rates and a later export recovery becomes more difficult than simply reopening a port.

The temporary lifting of the blockade in June also demonstrated the opposite effect. Iranian exports recovered rapidly once restrictions were relaxed, showing that maritime denial rather than lack of production capacity had been the principal constraint. This is strategically relevant because it confirms that blockade relief has immediate economic value to Tehran and can therefore be used as a negotiated concession rather than granted in advance.

The blockade should not be confused with a mechanism that guarantees political surrender. Iran has decades of experience with sanctions evasion, informal trade and economic hardship, and its leadership may accept significant domestic pain to preserve strategic programmes. The coercive value instead lies in the cumulative narrowing of options. Reduced foreign exchange makes imports more expensive, limits access to military components, weakens the currency, increases inflationary pressure and forces prioritisation between domestic spending and external commitments.

Time therefore matters. In the first weeks, Iran can draw on inventories, existing foreign-exchange reserves and previously financed proxy networks. Over several months, storage constraints, reduced oil sales, repair costs, military expenditure and declining confidence interact. The economic pressure becomes nonlinear: each additional month is more difficult to absorb because the system has less spare capacity than the month before.

The principal countervailing risk is that the blockade also imposes costs on the United States and its partners. It contributes to energy-market volatility, raises insurance and shipping costs, creates legal and diplomatic controversy, and increases the possibility that a maritime enforcement action causes significant casualties. Its effectiveness therefore depends not only on Iran's economic endurance but also on Washington's ability to sustain coalition support and manage the global economic consequences.

NEGOTIATING LEVERAGE

8. Strategic Link to Hormuz and Iran's Nuclear Programme

Iran's current strategy is to convert control or disruption of the Strait of Hormuz into negotiating leverage. Tehran has repeatedly linked reopening or normalising the strait to U.S. concessions, including relief from the maritime blockade and other economic pressure. From Iran's perspective, the longer global energy markets remain disrupted, the greater the pressure on Washington and Gulf states to accept a compromise that restores shipping before the nuclear issue is fully resolved.

The United States has a strong reason to resist that sequencing. Removing the blockade first would restore one of Iran's principal sources of foreign currency while leaving Washington with fewer coercive tools to secure subsequent nuclear concessions. The rapid export rebound during the June relaxation demonstrates how quickly Tehran can monetise stored crude once maritime restrictions are removed.

The more durable negotiating approach is therefore to treat blockade relief as phased, verifiable and reversible. Initial relief could be linked to demonstrable freedom of navigation through Hormuz and practical de-escalation measures. More substantial relief should be linked to measurable nuclear steps, including arrangements dealing with highly enriched uranium, enrichment capacity and international verification. This does not guarantee Iranian acceptance, but it preserves leverage while providing Tehran with a clear economic path out of the crisis.

From a strategic perspective, a sustained blockade can be more useful than indefinite high-tempo airstrikes because it imposes continuing pressure while remaining reversible. Airstrikes can destroy specific capabilities, but they may also strengthen hard-line narratives, consume expensive munitions and create escalating demands for retaliation. Economic-maritime pressure affects Iran's capacity to regenerate those capabilities and finance partners. The strongest approach is therefore not blockade in isolation, but blockade combined with selective military deterrence and a credible diplomatic off-ramp.

REGIONAL & BUSINESS IMPACT

9. Regional and Business Impact

The simultaneous deterioration of Hormuz and Bab el-Mandeb has reduced the redundancy normally available to Gulf exporters and international shipping. In July, crude and condensate exports from Saudi Arabia, the United Arab Emirates, Iraq, Kuwait and Iran averaged approximately 10.7 million barrels per day, around 40% below pre-war levels. At least 14 vessels reported attacks in the wider region during July, compared with eight in June.

Saudi Arabia is particularly exposed because Houthi pressure targets the Red Sea route used to bypass Hormuz. Yanbu remains a major export outlet, but the threat near Bab el-Mandeb forces vessels to consider northern routing through Suez, use of the SUMED pipeline, additional security measures or voyage delay. The Jazan and Mokha incidents also show that the threat is not limited to vessels at sea; ports, refineries, storage areas and logistics nodes can be attacked directly.

For commercial operators, the main effects are higher war-risk insurance premiums, longer voyage times, additional fuel consumption, uncertain port schedules, possible crew reluctance, contractual disputes over unsafe-port clauses and greater exposure to sudden route changes. Companies that depend on maritime movement should expect volatility even when their own vessels or cargoes are not directly targeted.

The broader energy-market effect is also significant. Saudi Aramco has estimated that global oil inventories have fallen by more than 2.6 billion barrels since the conflict began and that replenishment could take around 18 months even if Hormuz reopened immediately. This means that a political agreement would not immediately return the energy system to pre-war conditions; depleted inventories and altered shipping patterns would continue to affect prices and logistics well into the recovery period.

For foreign workers and land-based corporate operations, the principal risk remains indirect. Personnel are more likely to be affected by airspace disruption, fuel-price volatility, temporary port or airport closures, heightened security around energy infrastructure and localised missile or drone alerts than by deliberate targeting. The exception is personnel working at or near strategic ports, refineries, military facilities or other infrastructure connected to the current confrontation.

THREAT ASSESSMENT

10. Threat Assessment

RISK AREA	RATING	ASSESSMENT
Commercial shipping - Bab el-Mandeb	**HIGH**	Confirmed fatal Houthi attack; targeting criteria may extend beyond ownership to cargo, port calls or perceived Saudi association.
Saudi Red Sea energy / port infrastructure	**HIGH**	Repeated Houthi attacks and declared embargo; Jazan, Yanbu-linked shipping and southern Red Sea approaches remain exposed.
Commercial shipping - Hormuz / Gulf of Oman	**HIGH**	Iranian restriction of traffic and active U.S. blockade enforcement create simultaneous state-on-vessel risks.

RISK AREA	RATING	ASSESSMENT
Renewed large-scale Yemen conflict	**HIGH**	Saudi-Houthi de-escalation has broken down; attacks on Mokha, Marib, Hadramout and Saudi territory increase ground-war risk.
Immediate collapse of Iranian support to Houthis	**LOW**	Recent July transfers indicate support remains active and may have increased.
Gradual degradation of Iranian proxy support over 3-6 months	**MODERATE-HIGH**	Sustained loss of oil revenue and interdiction would progressively constrain funding, specialised components and regeneration capacity.

FUTURE OUTLOOK

11. Future Outlook

Near term - next 2-4 weeks. The most likely scenario is continued selective Houthi pressure rather than an attempt to physically close Bab el-Mandeb to all shipping. The Houthis can achieve significant strategic effect by attacking a small number of vessels associated with Saudi trade, by striking Red Sea infrastructure and by creating uncertainty over targeting criteria. Further commercial casualties are a credible risk, particularly if vessels continue operating close to Yemen without reliable guarantees of safe passage.

Saudi-Houthi confrontation. Further attacks on Saudi energy infrastructure, airports, ports or border areas are likely. Riyadh will continue strengthening air and missile defence, supporting Yemeni government forces and seeking international maritime cooperation. A large Saudi ground intervention remains less likely than expanded air and proxy action, but the probability of renewed major fighting inside Yemen has risen sharply since July.

Iranian support to the Houthis. Support is likely to remain substantial during the immediate period. Tehran has a strong incentive to sustain the Red Sea front because it threatens Saudi Arabia's alternative export corridor and raises the economic cost of the U.S. campaign. If the blockade continues to suppress Iranian oil revenue for several months, however, resupply is likely to become more selective. This should gradually affect replacement rates for advanced missiles, guidance components and specialist systems even if lower-cost drones and locally assembled weapons remain available.

U.S. blockade. Enforcement is likely to continue and may become more standardised, with shipowners increasingly choosing compliance rather than testing the blockade. The major escalation risk is a future interdiction that produces substantial crew fatalities, environmental damage or direct confrontation with a state-backed escort. Such an event could shift international opinion and increase pressure for negotiated limits on enforcement.

Hormuz negotiations. Diplomatic activity will continue because both sides face costs from prolonged disruption. Iran will attempt to separate the reopening of Hormuz from the nuclear issue and obtain early blockade relief. Washington is more likely to secure durable leverage if it resists front-loading economic concessions and instead offers phased relief tied to verified maritime and nuclear steps.

Medium term - 1-6 months. The decisive variable will be endurance rather than a single battlefield event. If Iranian export revenue remains severely constrained while domestic inflation, infrastructure damage and military expenditure continue, Tehran's ability to sustain the current level of regional activity should weaken. The process is unlikely to be rapid or linear, but the strategic balance increasingly favours the side able to maintain economic pressure without losing political support or allowing the conflict to widen uncontrollably.

OPERATIONAL GUIDANCE

12. Risk Control and Operational Measures

- **Maritime routing:** Organisations using contracted shipping should require current voyage-specific threat assessments for Bab el-Mandeb, the southern Red Sea, Gulf of Oman and Hormuz. Route decisions should consider not only vessel flag and ownership but cargo, charterer, recent port calls and any perceived Saudi or Iranian association.
- **Ports and energy facilities:** Non-essential presence at ports, refineries, export terminals and major military-adjacent facilities in exposed areas should be minimised during periods of elevated missile or drone warning. Meetings and logistics activity should be rescheduled if local authorities activate security cordons or air-defence responses.
- **Travel and airspace:** Regional travel should remain flexible. Personnel should be prepared for short-notice airspace closures, diversions and flight cancellations. Travel management should maintain alternate routing and sufficient accommodation contingency for delayed staff.

- **Personnel accountability:** Operations in affected GCC and Red Sea states should maintain rapid staff-notification and welfare-check procedures. Accountability checks should be geographically targeted to personnel in affected areas rather than applied indiscriminately across entire countries.
- **Business continuity:** Supply chains dependent on maritime imports should identify alternative ports, longer lead times and minimum critical stock levels. Contracts should be reviewed for war-risk, unsafe-port, force majeure and delay provisions where practical.
- **Alert thresholds:** Companies should define escalation triggers in advance, including confirmed attacks within operational areas, repeated air-defence activation, closure of local airports or ports, sustained disruption of fuel supply, or official instructions to shelter or evacuate.
- **Recovery:** Following a maritime or infrastructure incident affecting company personnel or contractors, priorities should be accountability, emergency medical support, family liaison, liaison with diplomatic missions and confirmation of continuing threat before resuming activity. Business recovery should incorporate lessons from communications, transport and supply-chain disruption rather than defaulting to permanent movement restrictions.

CONCLUSION

13. Conclusion

The 11 August Tihamah attack should be treated as a major development in the wider Iran conflict. The death of commercial crew members and rescuers confirms that Houthi maritime activity has moved beyond warning, harassment and unsuccessful interception into a phase capable of producing significant loss of life. Together with attacks on Saudi shipping, Jazan, Mokha and other targets, it demonstrates that the Red Sea has become an active secondary front rather than a peripheral extension of the Gulf confrontation.

The Houthi escalation also reactivates the long-running proxy conflict with Saudi Arabia at a time when Riyadh depends more heavily on Red Sea export routes to compensate for disruption in Hormuz. This gives the Houthis and Iran significant leverage, but it also exposes them to stronger Saudi and international countermeasures and creates a real risk that Yemen returns to major warfare.

Iranian support to the Houthis should not yet be described as diminishing. Recent evidence instead indicates continued assistance. The more defensible assessment is that sustained U.S. economic and maritime pressure will progressively make that support harder to maintain. The effect will be gradual: financial transfers, specialist components and regeneration capacity should tighten before the Houthi movement itself loses the ability to conduct attacks.

The U.S. blockade is therefore strategically important because its value increases with time. The first enforcement phase demonstrated a sharp decline in Iranian seaborne exports and rapid accumulation of unsold oil. Continued pressure forces Tehran to choose between accepting reduced revenue, filling finite storage, cutting production and using increasingly costly evasion methods. It also progressively reduces the resources available for military rebuilding and external partners.

The blockade is not cost-free and should not be treated as a substitute for diplomacy. It contributes to global energy disruption, carries escalation and legal risks, and requires sustained political support. Nevertheless, it remains a high-value coercive tool precisely because it is reversible. If Washington retains the patience to preserve that leverage while offering phased relief in return for verifiable freedom of navigation through Hormuz and substantive nuclear concessions, the economic balance of endurance is likely to move increasingly against Tehran.

The central strategic contest is therefore shifting from which side can inflict the greatest immediate military damage to which side can sustain pressure for longer. On current indicators, a disciplined combination of maritime denial, targeted economic pressure, defensive military deterrence and a clear negotiated exit offers a stronger prospect of compelling Iranian compromise than either premature blockade relief or an open-ended escalation of airstrikes.

SOURCE NOTE

Source Note

Assessment draws on Reuters and Associated Press reporting, U.S. Central Command statements, Yemeni and Saudi official reporting, and commercial maritime/oil-flow data available as of 12 August 2026. Claims attributed to belligerents or anonymous officials have been treated as unverified where independent confirmation is not available.