



**| Flash |**

# **Houthi, Iran-Oman Deal, and Conflicting Military Doctrines – SITREP #44: September 15, 2026**

F-2026-09-15a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics

**September 15, 2026**

## Scope Note

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# **| Flash | Houthis, Iran–Oman Deal, and Conflicting Military Doctrines – SITREP #44: September 15, 2026**

## **| Key Findings**

- Houthi actions are not directly coordinated by Iran but almost certainly benefit Iran by increasing energy prices and stretching military resources. Houthi advances will likely persist unless Saudi Arabia offers concessions or increases military support to retake Houthi-controlled parts of Yemen.
- The U.S. military has reportedly implemented a tanker-for-tanker strategy in response to Iranian attacks on U.S. warships, to run alongside an economic pressure campaign. As part of this, the United States has very likely sought to expand commercial shipping through the Strait of Hormuz (SoH). A resumption in U.S. attacks likely reflects concern that Iran will target vessels transiting the SoH outside Iranian terms.
- Occasional U.S. strikes are likely necessary to degrade Iran's ability to control the SoH while pressuring it to make concessions. Iran's political-military leadership very likely views SoH control as key to deterring future conflict as well as an economic opportunity, which constrains the effectiveness of the U.S. approach.

- Iranian leadership has consistently stated its new military doctrine is offensive and based on retaliation and preemptive attacks. U.S. military and economic escalation is unlikely to restrain Iran, and there is a roughly even chance that Iran escalates further if U.S. tactics prove successful. This risks maintaining a new cycle of escalation with the U.S. military.
- Continued progress on the Iran-Oman SoH transit agreement, alongside reports of Gulf and U.S. support, indicate that Iran is unlikely to surrender control of the strait and that continued conflict is likely costlier than accepting Iranian terms.
- Even if the deal is agreed upon, obstacles to normal SoH passage remain, as Iran has made clear that reopening still depends on further U.S. concessions linked to the June Memorandum of Understanding (MOU). If the accord never materializes or is rejected by the Trump administration, escalation is likely.
- Iran's hardline leadership is very likely continuing to drive policy decisions, reducing the likelihood that Iran adapts its positions.

## **| Latest Details**

The United States and Iran engaged in a wave of strikes on ships on September 8 and 9, with the U.S. military claiming to have sunk five Iranian oil tankers; Iran claimed to have struck 10 vessels in response, including two U.S. warships, in addition to targeting a U.S. military base in Jordan. U.S. officials claimed the attacks on Iranian vessels were in response to recent Iranian attacks on U.S. ships in the region.<sup>1</sup> The United States recently announced a new policy of striking Iranian oil tankers in response to attacks on U.S. assets, known as the tanker-for-tanker strategy.<sup>2</sup>

- In the last month, Iran has begun utilizing more sophisticated weaponry, such as high-payload cruise missiles aimed at ships rather than low-payload drones,<sup>3</sup> likely to better penetrate defenses and deter commercial shipping.
  - Iran had thus far avoided targeting U.S. vessels during the war and is likely now shifting tactics as the United States undertakes Operation Economic

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<sup>1</sup> [hXXps://www.reuters.com/world/middle-east/iran-attacks-us-base-jordan-ships-near-hormuz-after-tankers-sunk-2026-09-09/](https://www.reuters.com/world/middle-east/iran-attacks-us-base-jordan-ships-near-hormuz-after-tankers-sunk-2026-09-09/)

<sup>2</sup> [hXXps://www.axios.com/2026/09/02/iran-tankers-hormuz-attacks-oil](https://www.axios.com/2026/09/02/iran-tankers-hormuz-attacks-oil)

<sup>3</sup> [hXXps://understandingwar.org/research/middle-east/iran-update-september-9-2026/](https://understandingwar.org/research/middle-east/iran-update-september-9-2026/)

Outcast.<sup>4</sup> A direct hit on a U.S. ship resulting in casualties would very likely lead to further escalation.

- Iran is likely focused on targeting use of the southern corridor of the SoH and demonstrating continued control.
  - Official SoH passages remain low, though significant "dark transits" likely occur in the southern corridor bordering Oman that involve U.S. naval protection and ship-to-ship transfers. Dark transits have likely meaningfully increased energy products transiting through the strait, placing a ceiling on energy prices and reducing Iranian leverage.<sup>5</sup>
- In the near term, Iran will likely target exports through the SoH, including ship-to-ship transfers. Iranian Brigadier General Hossein Mohebbi said that Iran has expanded its attack zone to include "unauthorized" shipping through SoH.<sup>6</sup>

## Yemen

The Iran-aligned Houthis seized nearly all of Yemen's remaining Red Sea coastline from Saudi-backed government forces in an offensive between September 10 and 11.<sup>7</sup> In addition to the newly captured port cities of Mokha and Dhubab, the Houthis now control Perim Island,<sup>8</sup> which sits in the center of the narrow Bab al-Mandeb Strait separating the Red Sea from the Gulf of Aden.

- This gives the Houthis near-complete control over Red Sea access and very likely greatly expands the variety of weapons the group can use to target vessels entering or exiting the strait. While the SoH is approximately 39 kilometers wide at its narrowest point (wide enough that Iran has difficulty detecting and targeting dark vessels on its far side), the Bab al-Mandeb narrows down to 21 kilometers, giving the Houthis comparatively better insight into activity in the waterway. A Houthi spokesperson claimed the group plans to continue targeting only

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<sup>4</sup> ZeroFox Flash Report: Operation Economic Outcast – SITREP #43: September 2, 2026

<sup>5</sup> [hXXps://www.reuters.com/business/energy/one-third-gulf-oil-is-still-missing-despite-dark-crossings-data-shows-2026-09-09/](https://www.reuters.com/business/energy/one-third-gulf-oil-is-still-missing-despite-dark-crossings-data-shows-2026-09-09/)

<sup>6</sup> [hXXps://www.bloomberg.com/opinion/articles/2026-09-14/trump-s-little-war-with-iran-just-got-bigger-because-of-the-houthis](https://www.bloomberg.com/opinion/articles/2026-09-14/trump-s-little-war-with-iran-just-got-bigger-because-of-the-houthis)

<sup>7</sup> [hXXps://www.bbc.com/news/live/cmd683p01ejt](https://www.bbc.com/news/live/cmd683p01ejt)

<sup>8</sup> [hXXps://www.aa.com.tr/en/features/explainer-what-is-bab-el-mandeb-and-why-it-matters/4054540](https://www.aa.com.tr/en/features/explainer-what-is-bab-el-mandeb-and-why-it-matters/4054540)

Saudi-linked shipping, as has been the case for nearly two months.<sup>9</sup> However, control of the Bab al-Mandeb would likely allow the group to implement stricter measures if it chooses to, including stopping traffic through the strait entirely.

This came as the Houthis stepped up attacks on Saudi targets, including oil infrastructure and airports. On September 7, the Houthis reportedly struck four Saudi cities near the Yemeni border, injuring at least 73 people and temporarily downing several oil production facilities. Houthi targets included the oil production facilities in the Saudi city of Jizan.<sup>10</sup> Attacks on Saudi Arabia continued as recently as September 14, when the Houthis claimed to have targeted a Saudi airbase at Khamis Mushait.<sup>11</sup>

Further, Saudi Arabia claimed on September 11 that its east-west oil pipeline—which is responsible for transporting crude to the Red Sea coast for shipment—was attacked by drones originating from Iraq.<sup>12</sup> Saudi authorities temporarily shut down the pipeline. The attack showed the ease with which future attacks could impact the pipeline, which runs for nearly 1,200 kilometers (745 miles) through the country's largely remote center. With transit through the SoH restricted, the pipeline is almost certainly Saudi Arabia's best way to continue oil exports. A more sustained disruption is predicted to decrease global oil supplies by approximately 4 percent.<sup>13</sup>

## **Iran–Oman Deal**

In the lead-up to September 14, both Iran and Oman reported being near an agreement to temporarily reopen the SoH. However, the future of the deal was put into question after a planned signing ceremony on September 14 was canceled when multiple Gulf countries dropped out of attendance. While no official statement was issued, Iran's Foreign Ministry claimed the cancellation was due to an objection by Saudi Arabia.<sup>14</sup>

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<sup>9</sup> [hXXps://www.timesofisrael\[.\]com/liveblog\\_entry/houthis-say-shipping-safe-except-for-saudi-vessels-vow-further-escalation/](https://www.timesofisrael.com/liveblog_entry/houthis-say-shipping-safe-except-for-saudi-vessels-vow-further-escalation/)

<sup>10</sup> [hXXps://www.reuters\[.\]com/world/middle-east/saudi-led-coalition-yemen-says-73-injured-houthi-attacks-kingdom-2026-09-08/](https://www.reuters.com/world/middle-east/saudi-led-coalition-yemen-says-73-injured-houthi-attacks-kingdom-2026-09-08/)

<sup>11</sup> [hXXps://www.reuters\[.\]com/business/energy/diplomacy-stumbles-with-postponement-meeting-strait-hormuz-proposal-2026-09-13/](https://www.reuters.com/business/energy/diplomacy-stumbles-with-postponement-meeting-strait-hormuz-proposal-2026-09-13/)

<sup>12</sup> [hXXps://www.aljazeera\[.\]com/news/2026/9/12/saudi-arabia-shuts-critical-oil-pipeline-after-drone-attack-what-happened](https://www.aljazeera.com/news/2026/9/12/saudi-arabia-shuts-critical-oil-pipeline-after-drone-attack-what-happened)

<sup>13</sup> [hXXps://www.reuters\[.\]com/business/energy/saudi-pipeline-outage-threatens-loss-4-global-oil-supply-2026-09-13/](https://www.reuters.com/business/energy/saudi-pipeline-outage-threatens-loss-4-global-oil-supply-2026-09-13/)

<sup>14</sup> [hXXps://www.aljazeera\[.\]com/news-analysis/2026/9/14/temporary-hormuz-solution-deferred-as-iran-arab-summit-falls-through](https://www.aljazeera.com/news-analysis/2026/9/14/temporary-hormuz-solution-deferred-as-iran-arab-summit-falls-through)

According to preliminary reports, the deal, if enacted, would last 60 days, with ships entering via Iranian waters and exiting via Omani waters in coordination with Iran. No tolls apply for the first period, and the middle passage—now reportedly cleared of mines—would be managed by Iran and Oman with two-way traffic.<sup>15</sup>

- Iran is likely to push for fees after the 60-day period, which the United States very likely opposes. There is a roughly even chance Iran seeks to limit passage of vessels belonging to hostile countries.

## **| Analyst Commentary**

### **Iranian Goals and Military Doctrine**

On September 10, 2026, Mohammad Bagher Ghalibaf, the speaker of parliament and lead negotiator during previous ceasefire talks, warned the era of "proportionate responses" was over.<sup>16</sup> Iran's military doctrine is likely based on retaliation and preemptive strikes; Iran will likely seek to escalate attacks to break the current cycle and very likely maintains the ability to do so. Previous Iranian escalations have likely contributed to ceasefires, but escalations risk a return to full-scale war.

- The United States paused retaliatory targeting against Iran in July, despite Iran continuing to hit tankers—a pause it lifted with the recent September tanker-for-tanker attacks.
- Iran has stated it views negotiating or compromising after U.S. attacks as inviting more pressure,<sup>17</sup> which is likely why it always retaliates. U.S. pressure is therefore more likely to lead to retaliation than result in compromise.
  - U.S. military and economic escalation is unlikely to restrain Iran, and there is a roughly even chance that Iran escalates further if U.S. tactics prove successful.

Iranian decisions are very likely being influenced by hardliners whose aims include long-term SoH control. For this group, challenging U.S. naval escorts is key to long-term

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<sup>15</sup> [hXXps://www.reuters\[.\]com/world/middle-east/no-signed-hormuz-deal-expected-yet-oman-meeting-monday-iranian-official-says-2026-09-12/](https://www.reuters.com/world/middle-east/no-signed-hormuz-deal-expected-yet-oman-meeting-monday-iranian-official-says-2026-09-12/)

<sup>16</sup> [hXXps://english.almayadeen\[.\]net/news/politics/ghalibaf--era-of--proportionate-responses--to-us-aggression](https://english.almayadeen[.]net/news/politics/ghalibaf--era-of--proportionate-responses--to-us-aggression)

<sup>17</sup> [hXXps://www.iranintl\[.\]com/en/202609041335](https://www.iranintl[.]com/en/202609041335)

deterrence and monetization opportunities through tolls. Challenging U.S. naval escorts likely also weakens pragmatists among Iranian decision makers, who prioritize short-term SoH control to leverage economic growth via sanctions relief and unfreezing funds.

- Iran's hardline leadership is very likely continuing to drive policy decisions, reducing the likelihood that Iran adapts its positions. This group very likely prioritizes survival, SoH control, nuclear and ballistic missile rights, and support for regional militias over economic improvement.

## **Houthi Aims**

Until August, Houthi rebels in Yemen had stayed out of Iran's conflict with the United States and Israel. This likely demonstrates the Houthis are not a dedicated Iranian proxy but, rather, an independent group pursuing its core interest of gaining recognition as the government of Yemen. In cases where this goal overlaps with Iranian interests, the Houthis are very likely to act on behalf of Iran in exchange for Islamic Revolutionary Guard Corps (IRGC) support.

- Houthi leadership is almost certainly divided between hardliners seeking a greater axis of resistance support, which they view as central to their cause, and pragmatists prioritizing short-term gains that preserve state-building capacity.

To this end, Houthi demands have focused on weakening Saudi support for the internationally recognized government of Yemen: the Presidential Leadership Council (PLC). They also seek reconstruction funding and PLC sharing of funds with Yemenis under Houthi control.<sup>18</sup> Saudi Arabia is likely to meet only some of these terms. The Houthis will likely moderate their demands if they experience territory losses, which will almost certainly require substantial Saudi military support.

- The Houthis have requested unrestricted access to Sana'a International Airport, likely to establish an Iran corridor, and a similar lifting of restrictions on maritime ports,<sup>19,20</sup> which Saudi Arabia is unlikely to accept.

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<sup>18</sup> [hXXps://www.israelhayom\[.\]com/2026/09/14/yemeni-official-blames-saudi-policy-houthis/](https://www.israelhayom.com/2026/09/14/yemeni-official-blames-saudi-policy-houthis/)

<sup>19</sup> [hXXps://www.pbs\[.\]org/newshour/world/iran-backed-houthis-in-yemen-claim-new-attacks-on-saudi-arabia](https://www.pbs.org/newshour/world/iran-backed-houthis-in-yemen-claim-new-attacks-on-saudi-arabia)

<sup>20</sup> [hXXps://www.israelhayom\[.\]com/2026/09/14/yemeni-official-blames-saudi-policy-houthis/](https://www.israelhayom.com/2026/09/14/yemeni-official-blames-saudi-policy-houthis/)

- The PLC has largely vacated the western coast of Yemen and is very unlikely to recover territory in the short term.

Saudi Arabia is likely to continue with airstrikes against Houthi targets and supporting the PLC. Houthi targeting of vessels in the Red Sea will likely continue, with exemptions for non-Saudi Arabian vessels. However, this stance will likely shift if Saudi Arabia escalates attacks in Yemen, increases PLC support, or if the United States enters the conflict in support of Saudi Arabia.

- A military escalation by Saudi Arabia in Yemen very likely increases the risk of intensified and longer-range Houthi attacks into Saudi Arabia, potentially reaching key cities such as Jeddah and Riyadh.
- Houthi advances, if sustained, will very likely weaken Saudi Arabia's ability to protect its economy, which has already been damaged by the effective closure of the SoH. This would put two anti-Saudi forces in control of the Middle East's key supply chains for energy products.

## **Future of Proposed Iran-Oman Deal**

The proposed Iran-Oman deal, which was reportedly nearly finalized as of September 13, would allow Iran to maintain control over most of the SoH, very likely sustaining risks to SoH transits. However, the future of the deal is uncertain after Gulf states refused to attend a negotiation session on September 14. This refusal was almost certainly initiated by Saudi Arabia, which faces new risks as a result of the Houthis' advance in Yemen and recent Houthi attacks on its oil infrastructure.

- Gulf authorities are very likely attempting to reach a consensus over next steps regarding Iran. The Iran-aligned Houthis' newfound control of Bab al-Mandeb, coupled with the vulnerability of Saudi Arabia's east-west pipeline and continued Iranian strikes on cargo vessels in the SoH, has all but certainly led some factions within Gulf governments to call for greater accommodation of Iranian demands. The alternative would be military confrontation with the Houthis and possibly Iran, both of which have already proven able to withstand sustained bombing.

Regardless, U.S. acceptance of any Iran-Oman deal remains in doubt. Even if a deal is agreed to, other obstacles to reopening the SoH likely persist, including regional conflicts,

U.S.-Iran strikes, and Iran's demand that the United States meet the June 2026 MOU terms. The Iran-Oman deal is unlikely to coincide with Iran ceding SoH control, especially if the United States maintains its naval blockade.

- Iran has made clear that reopening the SoH depends on further U.S. concessions linked to the MOU, including lifting its blockade, releasing frozen funds, and oil sanction waivers. The Supreme National Security Council (SNSC) communicated these terms twice in August.<sup>2122</sup> Demanding that the United States remove military escorts of vessels exiting the southern corridor strait is also likely.
- Gulf state support for the deal likely reflects that Iran's leadership is very unlikely to surrender SoH control, which it almost certainly views as key to deterring future Israeli-U.S. attacks. There is a roughly even chance that sequencing issues cause the accord to collapse, especially if the United States requires Iran to compromise on nuclear issues or stop maritime attacks first. If an Iran-Oman accord is reached but subsequently rejected by the United States and Gulf states or if talks fail, escalation or wider conflict is likely.

## **Conclusion**

Iran is all but certainly using the SoH closure to pressure the United States to end the war across conflict zones, lift its naval blockade, and release frozen funds. Iran very likely plans to achieve these goals by absorbing social unrest from the resulting economic damage and outlasting the United States by worsening global economic conditions. The United States has instead signaled reliance on economic coercion and occasional military strikes to reopen the SoH.

Both sides likely view occasional escalation as part of the negotiation process and will likely continue to struggle to overcome key differences. This signals a prolonged period of partial confrontation during talks, with military pressure remaining a source of leverage that likely produces periods of military confrontation, economic coercion, and on-and-off negotiations. Even a new ceasefire would likely leave core issues unresolved, allowing for recurring conflict.

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<sup>21</sup> [hXXps://english.aawsat\[.\]com/world/5310128-iran-president-us-memorandum-best-path-out-stalled-war](https://english.aawsat[.]com/world/5310128-iran-president-us-memorandum-best-path-out-stalled-war)

<sup>22</sup> [hXXps://www.nytimes\[.\]com/2026/08/08/world/middleeast/iran-us-oman-strait-of-hormuz.html](https://www.nytimes[.]com/2026/08/08/world/middleeast/iran-us-oman-strait-of-hormuz.html)

## | Appendix A: Traffic Light Protocol for Information Dissemination

|                         | Red                                                                                                                                                                                          | Amber                                                                                                                                                                                                                                                                                                           |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHEN SHOULD IT BE USED? | Sources may use <b>TLP:RED</b> when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused. | Sources may use <b>TLP:AMBER</b> when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.                                                                                                        |
| HOW MAY IT BE SHARED?   | Recipients may NOT share <b>TLP:RED</b> with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.                                     | Recipients may ONLY share <b>TLP:AMBER</b> information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm.<br><b>Note that</b> <b>TLP:AMBER+STRICT</b> restricts sharing to the organization only. |
|                         | Green                                                                                                                                                                                        | Clear                                                                                                                                                                                                                                                                                                           |
| WHEN SHOULD IT BE USED? | Sources may use <b>TLP:GREEN</b> when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.              | Sources may use <b>TLP:CLEAR</b> when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.                                                                                                                                                   |
| HOW MAY IT BE SHARED?   | Recipients may share <b>TLP:GREEN</b> information with peers and partner organizations within their sector or community but not via publicly accessible channels.                            | Recipients may share <b>TLP:CLEAR</b> information without restriction, subject to copyright controls.                                                                                                                                                                                                           |

## **| Appendix B: ZeroFox Intelligence Probability Scale**

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

| Almost No Chance | Very Unlikely | Unlikely | Roughly Even Chance | Likely | Very Likely | Almost Certain |
|------------------|---------------|----------|---------------------|--------|-------------|----------------|
| 1-5%             | 5-20%         | 20-45%   | 45-55%              | 55-80% | 80-95%      | 95-99%         |