

# The American-Saudi Deal and its Implications for the Yemeni Conflict

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## Overview

For months, the United States of America has been pursuing a comprehensive deal with Saudi Arabia, which according to the US, would reflect a common vision of a more peaceful Middle East. This deal, which focuses on the issue of security, can redraw the geopolitical map of the Middle East, and will be an important transformation in the manner of confronting Iran's behavior and influence in the region. So, how would such a deal, if concluded, be reflected on the conflict in Yemen?

## An Ambitious Deal

Over the past weeks, the United States has changed gear and acted differently in the Middle East on the military and political spheres. Analysts link these active moves with a comprehensive deal that Washington is looking forward to conclude with Riyadh, and includes what may turn out to be a historical agreement between Saudi Arabia and Israel. The White House describes this bargain as a common vision of a more peaceful, stable and prosperous Middle East. There is no confirmed information to the effect that a complete and clear-cut initiative is already put forth, or that the parties concerned have reached a framework agreement on the issues and ideas that are being or must be discussed. The three countries concerned did not officially publicize their conditions and demands, but media reports revealed the most important demands and conditions that have been made. According to these reports, [US](#) demands include striking a bargain and signing an agreement of normalization of relations between Saudi Arabia and Israel and that Riyadh shall halt its growing relations with China. The most important [Saudi](#) demands, on the other hand, include signing a binding joint security pact with Washington, and that the United States shall support and supervise a Saudi civilian nuclear program, in addition to lifting or at least reducing restrictions on advanced American weapons sales to Saudi Arabia. The Saudis also demand Israeli [concessions](#) and guarantees to the Palestinians that would facilitate finding a pathway to a two-state solution.

## A Long Way to a Fair Deal

The [US administration](#) hopes to strike such a deal by the end of the year or before the commencement of the presidential election campaign in 2024. However, according to [indicators](#), the possibility of reaching an agreement soon is doubtful. Despite the optimistic statements by [US President](#), Joe Biden, in late July about making some progress, [US National Security Adviser](#), Jake Sullivan, last August stated that the US still has a long way to go.

A few days ago, the head of the Israeli [National Security Council](#) stated that despite the "great progress" in the normalization path, signing an agreement is not imminent.

At any rate, it is quite evident that striking an important bargain like this is a tall order. There are some insurmountable obstacles that must be overcome. These difficulties relate to the fact that the demands and preconditions put forth by the three states are controversial, arouse concerns and reservations, and are not easy to fulfill. From the viewpoint of the United States and Israel, acquiescing to Saudi security demands, for example, will be a threat to Israeli military superiority and will contradict the policy of non-proliferation of nuclear weapons. Apart from the [disagreements](#) in the Biden administration on these demands, any defensive agreement with Riyadh will require the approval of the US Congress, which is a difficult task. In an interview with [CNN](#), President Biden said that granting Saudi demands is a little distant. Moreover, these demands are met with [opposition](#) in Israel. Although it is not easy that the hard-right government in Israel would agree to them, Saudi Arabia [insists](#) on obtaining concessions and guarantees to the Palestinians as a prerequisite for normalization with Israel. Without getting such concessions, normalization of relations with Israel will be a risk to Saudi Arabia's reputation and will undermine its position in the region.

On the other hand, there are incentives that may push things forward, and are mainly related to the great gains that the three actors are expected to attain. For the United States, these gains are essentially [geopolitical](#), and are represented by bolstering its alliances and presence in the region and containing the growing influence of China, Russia and Iran, in addition to the stability of global energy prices and the oil market. For Israel, such a deal constitutes a major and unprecedented political and economic victory as it opens the door for peace and economic integration with Arab and Islamic countries. Finally, for Saudi Arabia, the most important gains include getting rid of the security complex and the threats represented by Iran and its allies, and preserving its alliance with the United States and the West. Moreover, this deal will open the door to new capabilities for economic, technological and security cooperation with Israel. On top of that, there are common gains for the three countries and the region, as this deal will be a major shift that unleashes the economic capabilities of the region.

## Iran's Chances in Yemen vis-à-vis the Deal

Some [reports](#) indicated that putting an end to the conflict in Yemen is one of the demands that the United States put forward in discussions with Saudi Arabia.

Yet, this is doubtful since both the Americans and Saudis are not at odds on ending the conflict. In fact, both agree on ending the war and reaching peace and both exert efforts in this direction even though there are some minor differences in their visions of the mechanism of achieving peace.

However, the impact of this deal on the situation in Yemen is indisputable. This impact will take various forms, both directly and indirectly. It may be noted that such impact may happen early even before reaching any agreement. The sheer talk about this deal and negotiating it may push Iran and its Houthi allies to act more urgently and to sense the need of pushing Saudi-Houthi negotiations forward and break the ice that has dominated the scene of Saudi-Houthi talks for about two years. Negotiating this deal may arouse Tehran's concerns about the negative impact of the deal on the Chinese-brokered Saudi-Iranian rapprochement— which, for Iran, constitutes a great victory in the context of its confrontation with the US and the West, weakens the state of isolation it experiences, and circumvents the sanctions imposed on it. Such concerns may push Iran to act preemptively in order to prevent damage to and ensure continuity of this rapprochement and to encourage Saudi Arabia to keep on and move forward on that track. Considering that the question of security and ending the conflict in Yemen are priorities for Saudi Arabia, facilitating the negotiation process and pushing towards ending the conflict will be the best option that Tehran may pursue to end the war in Yemen and to show its good intentions and seriousness in improving relations with Riyadh and other countries in the region, as well as to convey a message to Riyadh that there is no need for any concessions to America and Israel.

There is another reason that may push Iran to act in this way; namely, its awareness that success in concluding such a deal will be in the interest of Saudi Arabia and its allies in the Yemeni conflict and will enhance their position, and that striking such a bargain in return will make its position and that of its Houthi allies weaker than ever in a way that threatens the gains that have been achieved so far. Accordingly, taking some early steps by Iran to facilitate the negotiation process and accelerate the pace of talks in order to achieve some progress will be a preemptive move required for the stabilization and protection of the strategic gains that Iran and its allies have achieved so far. Such a move will be also prompted by the urge to make use of the current balance of power and the existing political and field realities that tend to be in favor of Tehran and seem to be promising to it in terms of making new gains before it is too late.

## The Impact of the Deal on Yemen

If the deal is concluded successfully, it will be reflected on the Yemeni issue. However, the size and nature of its influence and its implications will differ depending on the timing in which it is concluded. It will have a greater and more important influence if it is concluded before achieving any progress or any important breakthrough in the Saudi-Houthis peace talks. On the other hand, the deal will have a lesser effect if it is concluded after making an important progress or after agreeing on the framework, mechanisms and issues of the final negotiations based on the current realities and the currently prevailing balance of power.

Any impact of this deal on the conflict in Yemen will come mainly as a result of the changes it will bring about on the map of regional relations and alliances in the Middle East, especially as a result of defining the currently prevailing balance of power, which governs the relations of the parties involved in the conflict. The most important transformation that this deal will likely bring about is that it will shift the balance of power, which currently tilts in favor of Iran and its allies, in favor of their opponents; namely, Saudi Arabia and Israel. Firstly, it will unite the assets and capabilities of these opponents against Iran and its allies. Secondly, it will open the door for a broad security and intelligence cooperation between Saudi Arabia, the United States and Israel. Thirdly, the deal may include security arrangements designed and aimed to confront Iran and its agents.

With regard to Saudi Arabia in particular, in its capacity as the party pitted against Iran and its allies in the Yemeni conflict, this deal will enable Saudi Arabia to meet its most urgent defensive needs as a result of lifting the restrictions on advanced American arms sales. Saudi Arabia will be fortified by American commitments to defend it from Iranian and Houthi attacks, and in the end its position in the Yemeni conflict, as well as in other issue, such as the Lebanese issue, will be strengthened, and its allies will be in a stronger position both in the military field and at the negotiating table.

On the other hand, the position of both Iran and its Houthi allies will become weaker than ever, as such a deal will be a disruption of the effectiveness of their military position. Such an outcome will be exacerbated by normalization of relations between Saudi Arabia and Israel. Given that Saudi Arabia is the most important Arab and Muslim state, its acquiescence to normalize relations with Israel, and the latter's acquiescence to provide concessions and guarantees for resolving the Palestinian issue under the principle of a "two-state solution," without which Saudi Arabia is unlikely to sign any normalization agreement with Israel, all of these factors will open the door for the recognition of Israel by other Arab and Islamic countries.

This, in turn, will weaken the "Palestinian issue" card that has long been a favorite motif in Iranian rhetoric and a central theme on which the so-called resistance axis and Iranian expansionist policy have been based.

## Scenarios of the Impact of the Deal on Yemen

While the impact of this deal on the balance of power and the map of alliances in the region is undisputable, its impact on the situation in Yemen may be different. The nature and extent of this effect will depend on Iran's estimate first and that of the Houthi group second of the nature of the changes in the equation of power and map of relations and alliances, and at the estimation of both parties of opportunities, risks and challenges. This puts us before one of the two scenarios below.

### Scenario 1: Helping to End the Conflict

The deal will help achieve progress towards ending the conflict and reaching a peace agreement in Yemen. It will push Iran and the Houthi group to engage more proactively with peace efforts. What drives this scenario is that such a deal weakens the position of the two parties and rules out, or at least minimizes, the option of war. For example, it will mean that the Houthis will lose the card of threatening to strike Saudi Arabia and the UAE and their interests, a loss that also translates into Iran's loss of chances of launching attacks on the two countries and attributing them to the Houthis. On the other hand, providing the Houthis with weapons, money and oil by Iran will become more difficult as a result of security and intelligence coordination between the three countries. This loss which rules out and disrupts the option of war and the option of targeting Saudi Arabia makes it almost meaningless to reject peace.

In addition, concluding such a deal will be a political and psychological defeat for Iran and its allies and will affect their morale. There are also the pressures and challenges imposed by the resulting variables. To continue pursuing current behavior and policies will give rise to new risks that have not existed before. It is assumed, for example, that Iranian support to the Houthis in its various forms will decline as a result of the waning of its chances and its increasing risks. This decline will be the result of Iran's practice of a kind of self-censorship conditioned by balancing gains and costs and other political considerations, such as Iran's eagerness to preserve the rapprochement with Saudi Arabia and other countries in the region. However, it should be noted that the conviction of the Iranians and the Houthis to change the equation in their interest, as well as their appreciation of the opportunities and risks of proceeding with their current behavior and policies may require testing them and measuring the reactions of the other parties.

Tehran, for example, will have to send new weapon shipments to the Houthis and that would test its ability and opportunities of continuing in such behavior and at the same time test the capabilities of other parties and the nature and degree of their security coordination after signing this deal. This scenario is the more likely given the long list of incentives that push towards it, and also given the pragmatism and sagacity that Iranian diplomacy has proven to enjoy.

## Scenario 2: New Complications

This deal may create additional complications in the Yemeni conflict that make reaching a peace agreement more difficult. There are those who tend to think that it will [likely](#) increase tensions and competition in the region as Tehran may view this deal as being directed against it and as an attempt to besiege it and even as a threat to it and to its influence in the region. Those analysts further argue that it will anger hardliners and push them to adopt more aggressive policies to face the outcomes and the supposed challenges resulting from it. In this context, Tehran may choose to provide more support to the Houthis and incite them to adopt a more belligerent and uncompromising position towards peace efforts and in the ongoing talks between them and Saudi Arabia. It may also prompt them to launch military operations and expand the theater of the war in Yemen. In the context of resisting the deal and its impact, Iran may also capitalize on normalization with Israel to undermine the reputation of Saudi Arabia, launch incitement campaigns against it, and portray Saudi normalization with Israel as a betrayal of Islam and Muslims and a stab in the back of resistance to the occupation.





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