

US-Houthi De-escalation: Dimensions and Implications

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Executive Summary

The recent understandings between the United States and Houthis to de-escalate tensions mark a significant shift in Washington's approach toward a group, which was previously designated as a terrorist organization. This shift involves adopting negotiation, mediated by Oman, whose diplomatic efforts are considered acceptable by Iran and its affiliated militias in the region, as a means to reach agreement.

While these understandings may carry politically negative implications—most notably, as some analysts suggest, an implicit recognition of Houthis that could undermine the legitimacy of Yemen's internationally recognized government—they also signal Washington's intent to contain maritime threats at the lowest military cost. This approach aligns with the current U.S. administration's focus on other priorities and issues.

Although the recent understandings present an opportunity for de-escalation, they remain fragile due to the absence of binding guarantees. Given the complexities of the regional political landscape, the risk of these understandings collapsing at any moment remains a distinct possibility. Furthermore, the Houthis' close ties to Iran mean that the sustainability of the agreement is likely to hinge on the outcome of Washington's ongoing nuclear negotiations with Tehran.

This paper explores the context of these understandings and analyzes their implications at the local, regional, and international levels. It also examines potential consequences and outlines likely future scenarios.

Announcement of the Understandings

On May 6, U.S. President Donald Trump announced a halt to airstrikes against the Houthis after the group's declared willingness to end hostilities. Speaking at a joint press conference with Canadian Prime Minister Mark Carney, Trump stated, "The Houthis have surrendered and asked the United States to stop the air raids. They no longer wish to fight."

The U.S. State Department characterized the understandings as a "test of the Houthis' seriousness." Houthi officials—despite their group's continued designation as a terrorist organization by Washington—claimed the deal involved mutual commitments: the Houthis would refrain from targeting U.S. forces in return for a halt to American strikes on Yemen.

According to CNN, a Pentagon official confirmed that the U.S. military had received orders to stop strikes against Houthi targets. The report added that the deal resulted from negotiations led by President Trump's envoy, Steve Witkoff, with Houthi representatives, and was brokered by Oman earlier this month. The network also linked the de-escalation to broader diplomatic efforts aimed at facilitating nuclear talks between Washington and Tehran¹².

Shortly after President Trump's announcement, Oman's Foreign Ministry issued a statement confirming that Muscat had mediated the ceasefire agreement between the United States and the Houthis. In its official statement, the ministry said: "Following the discussions and communications recently conducted by the Sultanate of Oman with the United States and the relevant authorities in Sana'a (the Houthis), aimed at achieving de-escalation, these efforts resulted in an agreement between both parties to cease hostilities." The statement further added, "Looking ahead, neither side will target the other, including U.S. vessels in the Red Sea and Bab al-Mandab, thereby ensuring freedom of navigation and the uninterrupted flow of international commercial shipping."³

The announcement came approximately 50 days after a sustained U.S. air campaign involving more than a thousand strikes against Houthi targets. When President Trump referred to the Houthis' request to end the airstrikes, he framed it as a surrender and a commitment by the group to stop fighting. However, several Houthi officials quickly denied this characterization, insisting there had been no surrender. Instead, they portrayed the outcome as a victory, emphasizing that the understandings made no reference to Israel—a point they highlighted as proof of their success in decoupling U.S. military actions from American support for Tel Aviv.

In this context, Israel's Channel 12 reported that the Israeli government was "shocked" by Trump's decision to halt the strikes on Houthis. U.S. media outlets quoted an Israeli official stating, "Israel was not informed in advance of the decision to stop the attacks on the Houthis."

Context of the Understandings

The U.S.-Houthi understandings emerged under highly unusual regional circumstances. Foremost among these is the ongoing war in Gaza, which many observers have described as a campaign of extermination by Israel. Additionally, the agreement also came just one week before President Trump's scheduled visits to three key Gulf states—Saudi Arabia, Qatar, and the United Arab Emirates. Analysts of Yemeni affairs widely interpret the timing as a strategic move by Washington to reduce tensions with the Houthis and foster regional stability ahead of this highly strategic Gulf tour. For the Trump administration, the visit represents a vital opportunity to reinforce ties with key Gulf allies and to secure progress on a number of high-stakes agreements, economic partnerships, and strategic collaborations.

Against this backdrop, the motivations of President Trump and his administration become

increasingly clear. The agreement with the Houthis offers the White House an opportunity to project a constructive image—one of commitment to de-escalation, tension reduction, and peace-building in a region that has remained one of the world’s most volatile for years.

Furthermore, de-escalation in this region addresses a key need for Gulf allies, particularly Saudi Arabia, which has supported various initiatives for de-escalation and an end to the war in Yemen since 2021—efforts that culminated in the brokered truce at the beginning of 2022. However, this does not necessarily imply Saudi approval of any U.S. agreement with the Houthis—especially one reached without its direct or indirect involvement.

It is also critical to note that these understandings coincide with US-Iranian negotiations concerning Iran’s nuclear program. This timing suggests a shared interest in maintaining a relatively stable environment conducive to dialogue. The Houthis’ close ties to Iran—manifested in their receipt of weapons, training, and technical support—have long been acknowledged by Washington, both implicitly and explicitly. Tehran, for its part, continues to assert that the Houthis act independently and make their own decisions without Iranian direction or interference.

At the same time, the U.S.-Houthi understandings also came at a time when the Houthis were in urgent need of a pause. Sustained U.S. airstrikes had inflicted significant damage, targeting critical military infrastructure, weapons depots, and senior commanders—some of whom had previously remained beyond reach for years. These losses created a strategic need for the group to regroup and recover. Although the Houthis have remained largely silent about the full extent of their material and human losses, it is evident that the damage was considerable. From their perspective, the timing of the agreement offers a critical opportunity to reorganize and offset the setbacks suffered over the previous two months.

Significance and Dimensions of the Understandings

According to experts and analysts, the U.S.-Houthi understandings—brokered by Oman—were shaped by several key considerations. Chief among them was Washington’s response to Gulf demands to de-escalate tensions with the Houthis. This is particularly relevant for Riyadh, which requires stability in the Red Sea to support the success of its Vision 2030 economic strategy. Moreover, Saudi Arabia had already engaged in dialogue with Tehran, and de-escalation in Yemen and the Red Sea was seen as creating a more favorable climate for U.S.-Iran nuclear talks—especially in light of the recent dismissal of National Security Advisor Michael Waltz, who was seen as closely aligned with Israeli Prime Minister Benjamin Netanyahu.⁴

According to several analysts, the de-escalation affords President Trump a political opportunity to present himself as a decisive leader capable of extinguishing regional conflicts and fostering conditions conducive to stability—an outcome that aligns with the aspirations of several regional powers. While the agreement has been cautiously welcomed, its narrow scope—focused solely on reducing tensions between the U.S. and the Houthis, and not including Israel—signals Washington’s intent to create an environment more conducive to negotiations with Tehran.

This approach reflects a willingness to prioritize strategic American interests, potentially at the expense of traditional Israeli concerns. It also marks a significant shift in U.S. policy, where the security of Israel has long been equated with American national security. In this context, the Trump administration may be seen as more assertive and goal-oriented than its predecessor. Whereas the Biden administration confined itself to rhetorical and logistical support for Israel, it failed to effectively curb Houthi aggression in the Red Sea—something the current administration is now actively attempting to address.

Should the White House be perceived as sidelining Israel in this context, it could provoke a strong reaction from the pro-Israel lobby, which may leverage its political influence to challenge President Trump. However, Trump appears unlikely to be swayed by such pressures as he advances through his second term. On the contrary, he may seek to reposition Israel as a strategic instrument of U.S. regional policy—particularly in scenarios where diplomatic negotiations with Iran collapse. In such a case, he could consider supporting or enabling Israeli military action against Iranian nuclear facilities.

The U.S. Department of Defense defended the understandings with the Houthis by stating that Washington’s priority is the protection of American interests, not regime change in Yemen. Secretary of Defense Pete Hegseth explained, “*We haven’t wiped out the Houthis completely. But we have other priorities to focus on—namely Iran and China.*”⁵ He added that the aim of the military campaign in Yemen was to bring the Houthis to the point where they say, “*We’re done.*” He emphasized that the campaign had been relentless in pursuing its military objectives.⁶

Oman: An Acceptable Mediator to Iran

The U.S.-Houthi agreement has underscored Oman’s significant role as a trusted mediator; a role acknowledged in both U.S. statements and a formal declaration by the Omani Foreign Ministry. This development strengthens Muscat’s position as a credible and effective intermediary—particularly in facilitating dialogue between Washington and Tehran over Iran’s nuclear program.

Notably, achieving an agreement between the U.S. and the Houthis may be more diplomatically complex than negotiations with Iran itself. The U.S. and Iran have previously engaged in an extensive, multilateral negotiation process that culminated in the 2015 nuclear deal during President Barack Obama's administration—a deal from which the U.S. later withdrew under President Trump's first term.

Oman has consistently sought to insert itself into complex and sensitive regional issues, particularly those involving Iran and its allied militias.

Currently, Muscat is also attempting to encourage dialogue between Yemen's internationally recognized government and the Houthis, aiming, as it claims, to end the war and reaching a peaceful political settlement. Oman's longstanding and stable relationship with Tehran has undoubtedly contributed to its acceptance by the Houthis as an acceptable mediator. However, Muscat has faced repeated accusations from Yemeni government allies of serving as a protector and enabler of a group now designated by Washington and many other nations as a terrorist organization.

The Yemeni Government's Position

Despite being engaged in a decade-long war to overturn the Houthi-led coup and restore legitimate state institutions, Yemen's internationally recognized government viewed the U.S. airstrikes on the Houthis as a valuable opportunity to weaken an Iran-backed adversary. However, it did not appear eager to escalate militarily or launch a major ground campaign. This reluctance stems from two primary concerns: first, the government remains unprepared for a full-scale decisive confrontation; second, launching an offensive while the Houthis are under American bombardment could deprive the government of both domestic and international public sympathy.

The Houthis have successfully positioned themselves as defenders of Gaza and Palestine amid the ongoing Israeli war on Gaza. This positioning has earned them a degree of moral credibility among certain segments of regional and local public opinion. For the Yemeni government to engage militarily at this moment could risk giving the Houthis an undeserved advantage in the narrative battle—particularly among local populations and those swayed by Houthi propaganda.

In this context, the U.S.-Houthi understandings appeared to have limited impact on the Yemeni government's strategic calculus. Yemeni and Gulf officials likely anticipated that Washington's position would not remain consistent, despite public statements about destroying the Houthis' military capabilities. This underscores a common understanding that U.S. actions are ultimately shaped by shifting calculations of American strategic interest—whether that means escalation or negotiation.

Nevertheless, some observers interpret the understandings as a weakening of the Yemeni government's position. The agreement implies a tacit recognition of the Houthis by the United States, despite their continued designation by Washington as a terrorist organization. From the perspective of the Houthis and some of their regional allies, the agreement was perceived as a political and symbolic victory. This comes after the US administration had declared for weeks its determination to defeat the Houthis and force them to halt escalation in the Red Sea through military strength, not dialogue and negotiation. The Houthis saw the shift to an agreement as an American failure and thus their own triumph.

Importantly, the agreement did not include a ban on launching missiles toward Israel, even though it contained a general clause on halting attacks on international shipping—a provision that implicitly covers Israeli vessels. The agreement nonetheless amplified the Houthis' perception of having gained the upper hand.

Mahdi Al-Mashat, head of the Houthis' Supreme Political Council—the group's highest political authority—publicly stated that “support for Gaza will not stop, no matter the cost,” describing President Trump's ceasefire announcement as a “victory that separates American support from the Zionist entity.” He further clarified that the ceasefire with the U.S. does not extend to halting attacks against Israel.⁷

Possible Scenarios

Although the U.S. understandings with the Houthis can be viewed from an international relations perspective as a “*deal of necessity*”, both sides retain multiple options for engagement. This is particularly evident given that when the U.S. president announced the deal, he cautioned that he would test the Houthis' sincerity—a sentiment echoed by Houthi leaders, who likewise stated they would evaluate the U.S. declaration before committing to its terms.

In light of the current local, regional, and international dynamics, three primary scenarios emerge as the most likely outcomes:

Scenario (1): Limited Success of the Understandings

This scenario envisions a temporary reduction in maritime attacks, without resolving Yemen's internal tensions. The Red Sea may remain under a form of “soft surveillance,” with each side maintaining a cautious watch over the other. Such a state of strategic restraint is already apparent in the guarded rhetoric that accompanied and followed the announcement of the deal. This scenario would be short-lived, effectively freezing regional issues until negotiations resume on the larger and more complex matter: Iran's nuclear program.

Scenario (2): Collapse of the Understandings and Resumption of Escalation

In this scenario, the Houthis violate the agreement—a possibility backed by their long history of breaches, often justified through various pretexts. This would likely trigger a renewed wave of U.S. airstrikes. Alternatively, the escalation could be initiated by the U.S., possibly targeting senior Houthi leaders after exhausting strikes on mid-level military and technical personnel. This pathway becomes especially plausible if U.S.-Iran nuclear talks fail. Either way, the outcome would be renewed political and military confrontation, particularly in the Red Sea.

Scenario (3): Comprehensive Peace Agreement

This scenario assumes the current “deal of necessity” could evolve into a more stable and sustained de-escalation framework. If successful, it may lay the groundwork for wider agreements that extend beyond the bilateral U.S.-Houthi dynamic to include other regional and international actors. Such a progression could expand the negotiation agenda to cover broader areas of conflict and cooperation, potentially drawing in the international community to transform the current limited understanding into a formal peace process. This would require meaningful progress in U.S.-Iran nuclear negotiations, which remain a key prerequisite for broader diplomatic breakthroughs.

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