

Between Axis Doctrine and the Calculus of Survival:

Will Houthis Join Iran's War?

Geopolitics

Strategy Unit

March 2026



Introduction

On February 28, 2026, the Middle East entered a new phase of “geopolitical volatility”¹ following the launch of the joint U.S.–Israeli military operation “Epic Fury.” The operation was not merely a conventional deterrence campaign; rather, it constituted a strategic decapitation strike that resulted in the assassination of Iran’s Supreme Leader, Ali Khamenei, and the disruption of key command-and-control structures within the Islamic Revolutionary Guard Corps (IRGC).

This sudden rupture at the core of the “Axis of Resistance” has placed actors on the alliance’s periphery—most notably the Houthi movement in Yemen—before an unprecedented strategic dilemma that combines the imperative of political survival with an ideological commitment to the doctrine of the “Unity of Fronts.”

By the end of the first week of U.S. military operations, battlefronts in Lebanon and Iraq had already begun to flare. In contrast, the Houthis have so far adopted a posture best described as strategic anticipation. Despite widespread public mobilization and strong rhetorical expressions of solidarity with Tehran, the movement has refrained from engaging in large-scale direct military action.

The group now faces a highly complex and consequential dilemma. On one side lies its deep ideological alignment with the Axis of Resistance and the expectation that it should provide military support to its principal regional ally. On the other lies the imperative of political and military survival, as well as the need to avoid devastating U.S.–Israeli retaliatory strikes that could target the movement’s leadership and strategic capabilities—potentially threatening the very foundations of its rule in Yemen.

This report analyzes the Houthis’ current posture, the strategic drivers shaping their decision-making, the movement’s operational capabilities, and the possible scenarios for its potential involvement in the conflict.

Current Reactions of the Houthi Position

During the first week following the launch of the U.S. operation and the assassination of Iran’s Supreme Leader, several political and operational indicators have emerged that shed light on the Houthis’ evolving posture.

¹ A dynamic condition within the regional or international system characterized by a high level of strategic uncertainty, accelerated shifts in the balance of power, and the potential for political and military alliances to be reconfigured. This condition leads to flexibility or instability in the distribution of geographical and political influence among international and regional actors over a relatively short period of time, which may coincide with a period of war.

First: Escalatory Rhetoric Coupled with Military Restraint

A clear gap has emerged between rhetorical escalation and operational restraint. The first three speeches delivered by the movement's leader, Abdul-Malik al-Houthi, reflected what can be described as a posture of strategic anticipation. While he declared full solidarity with Tehran and emphasized the movement's "readiness for any developments," he notably stopped short of announcing immediate military engagement or pledging direct retaliatory strikes. This restraint suggests an effort to absorb the shock of recent developments while reassessing the evolving balance of power before committing to full-scale involvement.

The movement appears keenly aware that immediate and comprehensive military engagement could trigger overwhelming U.S.–Israeli retaliation aimed at dismantling the organization within Yemen. Instead, it has focused on domestic mobilization, organizing large-scale demonstrations in Sana'a and other urban centers across Houthi-controlled territories in order to cultivate what it presents as a popular mandate for resistance.

At the same time, the group has adopted a narrative framed around "pre-emptive defense." Houthi discourse has gradually shifted away from the concept of "support"—which characterized its rhetoric during the Gaza war of 2023—toward a narrative of existential linkage. Houthi media outlets increasingly portray the attack on Tehran as a precursor to a broader campaign aimed at eliminating the movement in Yemen.

This framing serves an important strategic purpose: it seeks to legitimize any future military response as an act of self-defence and protection of national sovereignty, rather than merely an intervention in a broader regional conflict.

Second: Defensive Measures on the Ground

Operationally, the U.S. decapitation campaign against Iran appears to have triggered immediate defensive precautions within the Houthi leadership. These measures reflect growing concerns that similar strikes could target the movement's own command structure—particularly in light of the August 2025 attacks, which killed several senior Houthi officials and severely disrupted the organization's governing apparatus.

Since the outbreak of the current crisis, senior Houthi leaders have largely disappeared from public visibility, while strict restrictions have reportedly been imposed on the use of electronic devices. Communication directives issued by the leader's office have reorganized command channels into smaller, compartmentalized networks with minimal reliance on digital communications or environments where smartphones may be present².

2 Four sources from the Houthi movement at the political leadership level reported the disappearance of the senior military and political leaders from public visibility. Five relatives of military commanders confirmed that personal mobile phones had been switched off and that the lea-

The movement had already begun military precautionary measures during the period of heightened U.S. military deployments to the region in February 2026. According to multiple reports, all reserve forces were recalled to their units, missile launch systems were relocated to fortified mountain facilities, and missile and drone stockpiles were transferred from existing storage depots to more secure and hardened locations.

In addition, several launch systems have reportedly been relocated to previously unused sites—particularly locations that had not been employed during military operations over the past two years³.

The Houthis have also raised the readiness level of their unmanned naval capabilities, including suicide drone boats and unmanned underwater vehicles (torpedo-type systems), deployed along the Red Sea coast near Hodeida and surrounding islands. These systems represent a critical component of the movement's asymmetric deterrence strategy, particularly in any scenario involving renewed maritime escalation in the Red Sea corridor.

The movement appears to have adopted a new concept of maritime warfare centered on saturation attacks, potentially involving dozens of remotely operated drone boats and unmanned underwater attack systems launched simultaneously from pre-positioned platforms.

The Houthis seem to be betting that large-scale attacks employing novel and largely untested weapons systems could generate a degree of tactical surprise and establish what they perceive as a form of “technological deterrence”⁴. Their apparent calculation is that such operations could significantly raise the cost of securing global maritime trade routes and exert economic pressure on Washington without requiring a direct—and highly exposed—naval confrontation.

Emergency measures have also been activated across Houthi-controlled areas. Hospitals in northern Yemen have been placed on heightened alert, civil defense units have conducted training exercises to prepare for large-scale fires and rescue operations, and government facilities have been designated as potential emergency shelters for civilians.

Third: Military Reinforcement on Domestic Frontlines

At the same time, the Houthis have reinforced their frontline positions during the period of U.S. military buildup in the region. These deployments appear intended to prepare for potential coordinated offensives in both northern and southern Marib, while also intensifying attacks against government forces along the Red Sea coastal front near Hodeida and in Taiz.

ders had left densely populated civilian areas, relocating their families. The sources spoke to Abaḍad between March 1 and March 5, 2026.

³ Three military sources familiar with the details spoke to Abaḍad on February 28, 2026.

⁴ Four sources within the Houthi naval forces spoke to Abaḍad between January and February 2026

These moves can be interpreted as a pre-emptive deterrent signal directed at the internationally recognized Yemeni government, aimed at discouraging it from exploiting regional instability to launch a ground offensive. At the same time, the mobilization helps maintain operational readiness among Houthi forces in the event of sudden escalation.

Fourth: Internal Divisions within the Movement

Evidence suggests that the Houthi leadership itself is divided between two principal currents.

The first camp—often described as the “hawks”—views the current moment as a decisive historical juncture that requires direct intervention in the conflict regardless of the potential costs. From their perspective, Sana’a could become the next target of the expanding U.S.–Israeli campaign.

The second camp—the “pragmatists”—argues that premature escalation could turn the movement into a convenient target within a broader regional war and potentially erase the political and military gains the group has accumulated since seizing the capital in September 2014.

This internal debate has produced what might be described as a “gray-zone strategy.” The movement has publicly declared that it considers itself already in a state of war, while simultaneously leaving the decision of the postponement and the timing of a direct military response for its leader⁵.

Houthi leaders appear fully aware that Iran’s strategic umbrella has been significantly weakened. Any miscalculated response could trigger decapitation strikes against their own leadership and potentially jeopardize their grip on power in Yemen.

For this reason, their current posture appears to favor strategic maneuvering: maintaining maximum readiness while preserving key strategic options—including threats to maritime navigation and the potential use of advanced weapons systems such as the strategic missiles they claim to possess, including alleged hypersonic capabilities.

At the same time, the movement appears to be waiting to see how Iran’s new leadership structure consolidates itself, and whether it proves capable of stabilizing the situation before committing its full military capabilities to the evolving regional conflict.

Understanding this hesitation—and the Houthis’ posture of strategic anticipation—therefore requires examining the competing forces pulling the movement toward the brink of war, as well as the factors encouraging caution and restraint.

5 Statement by Ali al-Emad, member of the Houthi Political Bureau:

<https://www.yemenmonitor.com/Details/ArtMID/908/ArticleID166106/>

Drivers Pushing Houthis toward Direct Military Involvement

1. Existential Linkage and the Doctrine of a “Shared Fate”

The Houthi leadership does not view the U.S.–Israeli attack on Iran merely as a threat to a regional ally. Rather, it perceives it as a direct threat to its own survival. According to the movement’s narrative, dismantling the Islamic Republic of Iran and overthrowing its governing system would represent only the first phase of a broader project aimed at reshaping the regional order—often described in their discourse as a “New Middle East.”

Within this framework, the fall of the strategic “center” in Tehran would inevitably be followed by attempts to eliminate the Houthis in Sana’a.

From this perspective, military engagement becomes a form of pre-emptive self-defence—a means of confronting the threat before Washington and Tel Aviv redirect their full strategic attention toward Yemen.

2. Revolutionary and Religious Commitment

The Houthis frame their struggle within a rigid ideological and religious worldview. The movement’s leader, Abdul-Malik al-Houthi, along with other senior officials, has repeatedly declared that standing alongside Iran in this confrontation constitutes both a religious duty and a national obligation in the face of what they describe as hegemonic projects in the region.

Retreating from such a position would risk severely undermining the movement’s ideological credibility among its support base. For years, the Houthis have mobilized their followers around the rhetoric of the “Axis of Resistance” and slogans such as “Death to America.”

A sudden reversal at this critical moment could weaken the ideological narrative that underpins their political legitimacy and internal cohesion.

3. Externalizing the Internal Crisis

Houthi-controlled areas in northern Yemen are currently facing severe economic and social pressures, particularly with the approach of Ramadan 2026. Public sector employees have gone unpaid for extended periods, the country’s middle class has been largely eroded, and poverty and begging have increased sharply across major urban centers.

Participation in a major regional confrontation could provide the Houthi leadership with an opportunity to militarize society, suppress domestic demands for salaries and public services, and redirect widespread public frustration toward an external adversary.

In such a context, domestic demands for economic rights or public services could easily be reframed as acts of disloyalty or collaboration with the enemy during wartime, allowing the movement to tighten internal control and consolidate its authority.

4. Maintaining the Movement's Standing within the "Axis"

Following the heavy setbacks suffered by Hezbollah in Lebanon and the subsequent decline in its regional influence, the Houthis have increasingly emerged as what some analysts describe as the most resilient and adaptable actor within Iran's regional proxy network.

Active participation in the conflict could allow the movement to consolidate its status as a significant regional player capable of shaping deterrence dynamics. By threatening critical maritime chokepoints such as the Bab al-Mandab Strait or targeting U.S. military installations in the Gulf and the Horn of Africa, the Houthis could position themselves as an indispensable actor within the evolving regional security architecture.

Such leverage could ultimately translate into substantial bargaining power in any future international political settlement related to the regional conflict.

5. Subjection to Pressure of Islamic Revolutionary Guard Corps

Despite maintaining a degree of operational autonomy, the Houthis remain heavily dependent on Iranian logistical, technical, and military support. Should Tehran—through channels associated with the Quds Force of the Islamic Revolutionary Guard Corps (IRGC)—issue explicit instructions to fire a Red Sea front in order to relieve pressure on Iran itself, it would be extremely difficult for the ideological leadership in Sana'a to refuse such a request.

Houthi Military Capabilities

Over the past two years, the Houthi movement has undergone a significant military transformation—evolving from a localized insurgent force reliant primarily on guerrilla tactics into a regional actor possessing cross-border strike capabilities and increasingly sophisticated deterrence tools.

The group has used both periods of intense conflict and temporary ceasefires to expand and localize the production of a substantial weapons arsenal in cooperation with Iran's Islamic Revolutionary Guard Corps. These developments have significantly enhanced the movement's ability to challenge even advanced air defense systems.

Its capabilities can be broadly categorized as follows:

1. Missile Capabilities

The Houthis possess an increasingly advanced missile arsenal. While these systems do not technically qualify as hypersonic weapons, the movement frequently describes them as such in its propaganda and media messaging.

Among these systems is a new generation of ballistic missiles, including the “Palestine-2” missile, reportedly with a range of approximately 2,100 kilometers. The missile is believed to be a modified variant of Iran’s “Fattah-1” system. Its primary distinguishing feature lies in its high manoeuvrability both inside and outside the atmosphere at high speeds, which complicates interception by conventional air defense systems.

The movement is also believed to possess additional newly developed ballistic missile systems that were reportedly tested following the events of August 2025.

At the same time, the Houthis have upgraded their Quds cruise missile series, improving their ability to strike moving targets through the integration of advanced radar and electro-optical guidance systems.

2. Drone Warfare and “Swarm” Tactics

The Houthis possess long-range unmanned aerial vehicles such as the Wa’id drone, which reportedly has an operational range of up to 2,500 kilometers, placing it broadly within the same category as Iran’s Shahed-136 drones.

During the past two years of conflict—particularly following the April 2022 ceasefire—Houthi engineers have worked to enhance the destructive capacity of their drone systems and to enable coordinated swarm operations, in which multiple drones simultaneously target a single objective based on pre-programmed flight paths.

The movement has also reportedly experimented with hydrogen fuel-cell technology, allowing drones to remain airborne for extended periods and to operate at extremely low altitudes in order to evade radar detection.

Operationally, the Houthis frequently rely on saturation attack tactics, launching between 20 and 30 drones or explosive drone boats simultaneously in order to overwhelm air and naval defense systems and deplete the interceptor munitions of Western naval vessels.

3. Maritime Weapons

The Houthis have significantly expanded their maritime warfare capabilities, particularly through the development and deployment of suicide drone boats. According to the movement, modifications introduced following operational experience in 2024 and 2025 have significantly increased the destructive power of these systems. The group has also improved coordination between naval drone platforms and aerial drones in order to compensate for the absence of more advanced targeting technologies⁶.

6 An expert and former brigadier general in the Yemeni Navy spoke to Abaad in December 2025 and has closely followed the Houthis’ development of weapons.

Perhaps the most notable development is the introduction of unmanned suicide submersibles, representing one of the movement's newest weapons systems. The Houthis reportedly acquired torpedo and unmanned submarine technologies from Iran in late 2025, and a network of such systems has reportedly been deployed and placed on alert to target U.S. naval vessels in the Gulf of Aden and along Yemen's western coastline⁷.

In December 2025, large-scale disruptions to GPS signals were recorded in the Gulf of Aden, suggesting that the Houthis may possess electronic warfare jamming systems, possibly of Russian or Chinese origin, acquired through complex smuggling networks⁸.

According to a Houthi source, the movement has also tested radar-jamming equipment near the port of Berbera in Somaliland, located across the Gulf of Aden.

The Houthi Target Bank: (Theatres of Confrontation and Strategic Expansion)

The Houthis have expanded the geographic scope of their threat posture to include targets far beyond Yemen's territory and the Red Sea theater. Based on their current strategic rhetoric and operational deployments, the movement's potential target bank appears to be structured along several principal axes:

The Strategic Depth of Israel

Israeli territory occupies a central place in the Houthi target bank as both an ideological and operational priority. Potential targets include strategic urban centers such as Eilat, military airbases, and major seaports.

The threat spectrum could also extend to highly sensitive installations, including facilities such as the Dimona nuclear complex, which carries both symbolic and strategic significance within Israel's national security architecture.

Maritime Chokepoints and Expansion toward Indian Ocean

Houthi targeting is unlikely to remain confined to U.S., British, or Israeli naval vessels operating in the Red Sea and the Bab al-Mandab Strait. Operations could expand into the Arabian Sea, the Gulf of Aden, and potentially into the wider Indian Ocean

Such an expansion would likely aim to impose a broad maritime disruption strategy designed to undermine alternative logistical supply routes—including the Cape of Good Hope shipping corridor—and, if necessary, close the Bab al-Mandab Strait through the deployment of naval mines. An escalation on this scale could significantly disrupt, and potentially halt, major segments of global maritime trade.

⁷ Military sources close to the Houthis' military manufacturing circles spoke to Abaḥad in November 2025.

⁸ Yemeni military sources.

The Houthis are also reported to maintain a missile and drone launch team operating in Somalia. This presence could facilitate similar operations from outside Yemeni territory, providing the movement with easier access to open-ocean operational environments and expanding the geographic scope of potential attacks⁹.

U.S. Military Bases in the Region

The Houthis have advanced a new legal and political narrative designating U.S. military bases in Gulf States as “legitimate targets” that are operationally separate from the sovereignty of their host countries. This framing is justified by the claim that such bases serve as launch platforms for attacks against Iran.

This argument effectively places Gulf States under the threat of what amounts to a strategy of “coercive neutralization”, directly challenging their security by implying that military facilities located on their territory could be targeted regardless of host-state sovereignty.

The Horn of Africa Front and Coordination with Al-Shabaab

The Houthis may also shift their focus toward the Port of Berbera in Somaliland, located less than 200 miles from the Bab al-Mandab Strait. The movement has been closely tracking reported Israeli and Emirati activity at the port and has warned that any military assets stationed there would be considered legitimate targets.

If the conflict escalates or becomes protracted, the Houthis could potentially target the U.S. military’s Camp Lemonnier base in Djibouti—one of Washington’s most strategically significant facilities in the region. Any disruption to operations at this base would represent both a symbolic and operational blow to the United States.

Within the movement’s strategic calculus, the May 2025 agreement with the Trump administration is understood to apply specifically to American commercial shipping rather than to U.S. military bases. As a result, targeting regional bases could be viewed as an alternative means of exerting pressure while technically remaining outside the parameters of that understanding.

At the same time, the Houthis have reportedly coordinated with Somalia’s Al-Shabaab movement, supplying it with drones and advanced improvised explosive devices in an effort to create a “maritime pincer” strategy capable of attacking shipping simultaneously from the Yemeni and Somali coastlines. These efforts are reportedly supported by a Houthi missile and drone launch team already operating from Somali territory.

Energy Infrastructure and Economic Interests in Arabian Gulf: the “Deterrence Equation”

Energy infrastructure across the Gulf remains exposed to what the Houthis have repeatedly described as their strategic deterrence equation, summarized in the formula:

“Airports for airports, banks for banks, and ports for ports.”

Within this framework, desalination plants and other critical economic facilities could also become strategic targets aimed at destabilizing the economic security of Gulf States.

The Houthis have previously signaled the possibility of repeating earlier operations, including the “Ninth of Ramadan” operation in May 2019, which targeted oil pumping stations belonging to Saudi Aramco as well as key oil transportation routes. That attack preceded the far larger September 2019 strikes on the Al-bqaiq and Khurais oil facilities.

Subsequent operations followed a similar pattern. On 17 January 2022, fuel storage facilities in Abu Dhabi were targeted by drones and missiles. Earlier, energy infrastructure at the Saudi Yanba’a oil port had also been attacked twice: first through a naval mine operation in November 2020, and later through a missile and drone strike in March 2022.

Constraints on Full Escalation

Seven days into the war, most Houthi political and military leaders appear to agree on the necessity of becoming directly involved in the current conflict. This consensus spans both the movement’s ideological hardliners and its more pragmatic wing. Nevertheless, disagreements persist regarding timing and the scale of escalation—particularly whether to pursue full-scale engagement or adopt a phased escalation strategy. These internal debates are shaped by several factors that can best be understood as constraints on comprehensive escalation.

A. Fear of a “Decapitation Strike” Strategy

The precision and lethality of recent U.S.–Israeli strikes—culminating in the assassination of Iran’s Supreme Leader, Ali Khamenei, along with other senior Iranian officials through the use of B-2 strategic bombers and bunker-busting munitions—have sent a powerful deterrent message to Sana’a.

The movement’s pragmatic camp increasingly recognizes that the era of “leadership immunity” has effectively come to an end. Entering into a full-scale confrontation could leave Houthi leader Abdul Malik al Houthi and the movement’s senior command vulnerable to direct targeting, whether in the fortified cave complexes of Sa’ada or within Sana’a itself. Such a development could place the entire political project of the movement at existential risk.

B. Offensive by Government forces

The Houthis are fully aware that Yemeni government forces and allied factions are closely watching developments. A direct confrontation with the United States would likely result in the systematic destruction of Houthi military infrastructure, potentially creating an opportunity for the internationally recognized government forces to launch large-scale ground offensives aimed at reclaiming strategic areas such as Hodeida.

Indeed, military mobilization has already been observed across several front lines. Houthi leaders are also concerned by the speed with which Washington has moved to support opposition forces challenging Iran's ruling system. They fear that similar assistance could quickly be extended to their Yemeni adversaries if the movement were to initiate a full-scale regional war.

C. Dislocation of Iran's Command and Supply Network

The ongoing U.S. military campaign has significantly disrupted Iran's command-and-control infrastructure. This disruption has created a leadership vacuum and operational confusion that leaves the Houthis facing an unusual degree of logistical isolation.

Entering a prolonged and intensive war of attrition without assurances regarding the continued flow of weapons, spare parts, guidance technologies, and Iranian advisers would represent a serious strategic gamble. Under such conditions, the movement could find its arsenal depleted at a critical moment.

D. Consolidating Political Gains and De-Escalation Understandings

The Houthis are reluctant to abandon the agreements and informal understandings they have gradually secured in recent years. In May 2025, the movement reached a truce—brokered by Oman—with the Trump administration, under which attacks on U.S. shipping were halted in order to avoid severe American reprisals.

Renewed regional escalation could collapse this arrangement, risking a far harsher U.S. military response than the strikes carried out during 2024–2025.

It would also undermine any prospects of compelling Saudi Arabia to resume the payment of public-sector salaries from oil revenues—an issue the Houthis consider central to their domestic political survival.

E. Humanitarian Collapse and Extreme Economic Pressure

Although war can sometimes serve as a political justification for economic hardship, the administrative leadership within the Houthi movement understands that a large-scale confrontation with Western powers could trigger severe humanitarian consequences. Such a confrontation would likely lead to the complete closure of Hodeida port and the suspension of the remaining United Nations humanitarian relief operations.

This scenario would not merely deepen poverty; it could trigger widespread famine and the breakdown of essential supply chains, potentially igniting an armed popular uprising from within—one that even the movement's highly coercive security apparatus might struggle to contain.

The Houthis therefore find themselves torn between two powerful imperatives. On one side lies loyalty to a weakened regional alliance and the doctrine of the “unity of arenas.” On the other stands the political imperative of survival and the preservation of their governing authority.

For this reason, the movement currently appears inclined toward a strategy of carefully calibrated escalation. Such an approach would involve constructing a multi-stage response should the war continue. Initial actions could include sporadic drone launches or selective attacks on commercial shipping.

The objective would be to raise the economic costs for adversaries and signal continued alignment with the broader axis of resistance, while avoiding a comprehensive strategic confrontation that could provide Washington and Tel Aviv with a pretext for overwhelming military action.

Future Scenarios for Houthi Involvement

Based on a strategic reading of political and military developments during the first week of the war, Houthi decision-making appears to be oscillating among four primary scenarios.

Scenario One: Full Military Engagement (Existential Defense)

Under this scenario, the movement's leadership concludes that the collapse of Tehran would inevitably lead to the collapse of Sana'a.

Operating under such an assumption, the Houthis would likely launch ballistic missile and drone strikes against targets deep inside Israel, while simultaneously attempting to impose a full closure of the Bab al-Mandab Strait through the deployment of naval mines, unmanned maritime systems, and other asymmetric naval capabilities. Operations could also extend beyond the Red Sea toward the Indian Ocean.

This escalation could expand to include attacks on U.S. military bases in Gulf States or in the Horn of Africa, including installations in Djibouti or Berbera, which the movement would frame as legitimate military targets.

Risks: Such actions would almost certainly trigger overwhelming international intervention. This could include leadership-targeting “decapitation strikes” against Houthi command structures, as well as potential ground offensives by local adversaries that might deprive the movement of control over Hodeida—and potentially even Sana’a.

Any direct U.S. or Israeli strike against Houthi-controlled territory could accelerate movement toward this scenario by providing the leadership with a narrative justification that the group is responding to external aggression.

At the same time, the Houthis face a domestic dilemma: segments of the Yemeni public that rallied behind the movement in support of Palestinian resistance in Gaza may not view opening a new front in support of Iran as equally legitimate.

Scenario Two: graduated Escalation

A second—possible but less likely—scenario would involve a graduated and carefully managed demonstration of force. In this approach, the Houthis might begin with a sudden operation designed to showcase their military capabilities as a deterrent signal. This could then be followed by a staged escalation process using increasingly sophisticated weapon systems in order to maintain the element of strategic surprise.

Within this scenario, the movement would likely seek to preserve its ceasefire arrangements with Saudi Arabia—and potentially with the United States—by avoiding attacks on Saudi territory and American commercial shipping.

However, it could still target U.S. military bases in the Gulf, arguing that the May 2025 truce applies only to American vessels rather than to military bases. Escalation could also extend toward the Horn of Africa and potentially toward the United Arab Emirates and Bahrain.

This scenario would depend heavily on developments inside Iran and on coordination within the broader Axis of Resistance structure—particularly if Iranian leadership manages to restore strategic initiative.

At higher levels of escalation, the Houthis could also attempt ground offensives against Yemeni government forces, particularly in Marib, Al-Khokha, or Al-Makha, where forces aligned with Tariq Saleh are deployed—especially if Washington begins providing direct support to those forces similar to its support for opposition movements inside Iran.

Scenario Three: Limited and Controlled Escalation (Saving Face)

In this less probable scenario, political pragmatism prevails within the movement.

Recognizing the damage inflicted on Iran's logistical networks and the difficulty of sustaining prolonged warfare, the Houthis might limit their involvement to largely symbolic or demonstrative operations.

Such actions could include sporadic drone launches toward maritime targets or toward Israel, primarily intended to demonstrate continued solidarity with the "axis" while avoiding actions that would cross the threshold likely to trigger devastating U.S. or Israeli retaliation.

This scenario would prioritize maintaining the May 2025 truce with Washington while safeguarding the movement's political gains inside Yemen.

Scenario Four: Strategic Retrenchment and Domestic Reorientation: (*Tactical Disengagement*)

A fourth—and relatively rare—scenario could emerge if the Iranian state will be collapsed entirely, producing a strategic vacuum that cannot quickly be replaced. In the absence of Iranian logistical support and political guidance, the Houthis might decide to remain outside the regional confrontation and effectively distance themselves from the doctrine of the "unity of arenas." Their priority would instead shift toward domestic survival amid growing public unrest fueled by economic collapse and unpaid salaries.

Under these conditions, the movement could avoid direct regional war while reorienting its military posture inward. Rather than pursuing a strategy aimed at denying adversaries the ability to export oil, the Houthis might shift toward seizing or sabotaging oil infrastructure in Marib, Hadramout, and Shabwa—including facilities such as Safer and Al-Masila.

The objective would be to impose a new financial reality that compels Saudi Arabia and the international community to finance public-sector salaries under the pressure of threatened energy supplies.

Such a strategy would seek to neutralize Saudi Arabia and Western powers rather than provoke them, while exploiting the fact that the Houthis could emerge as the only surviving component of the regional axis. From that position, the movement might attempt to renegotiate a political settlement with Saudi Arabia that preserves its status as the de facto authority in northern Yemen.

Ideological Constraints

Both the third and fourth scenarios clash with the Houthis' ideological self-conception. The movement views itself not merely as a local armed faction but as a transnational revolutionary actor. This identity makes participation in broader regional escalation difficult to avoid if the group is to maintain ideological cohesion and credibility among its supporters—particularly in the eyes of its principal patron, Iran.

This dynamic has become even more pronounced since the events of 7 October 2023 and the subsequent weakening of Hezbollah in Lebanon, developments that have significantly deepened the strategic relationship between Tehran and the Houthi movement.



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