

U.S.–Iran Negotiations and Their Implications for Yemen

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Executive Summary

The Middle East is witnessing a new phase driven by the ongoing negotiations between the United States and Iran. The talks encompass several interconnected issues, most notably Iran's nuclear program, regional security, and the security of international maritime routes. Against this backdrop, several key questions arise:

To what extent could these negotiations influence the situation in Yemen? Could they contribute to ending a conflict that has persisted for more than eleven years? Or does the Yemeni conflict possess dynamics of its own that render it, at least partially, independent of regional and international negotiations?

These questions are particularly significant given the close relationship between the Houthi movement and Iran—a relationship widely viewed as enabling the group, as local proxies, to advance Tehran's strategic interests in Yemen and across critical international waterways.

This paper examines these questions by analyzing current local, regional, and international developments, taking into account both domestic actors and external stakeholders. It also explores a range of possible scenarios for the future of the Yemeni conflict in light of the U.S.–Iran negotiations, which—if successful—could trigger broader regional changes with important implications for Yemen.

Managing the Conflict or Resolving It?

For several weeks, negotiations have proceeded alongside reciprocal military escalation. Although this pattern has repeatedly threatened the diplomatic process, recent understandings have contributed to reducing tensions, particularly around the Strait of Hormuz, one of the negotiations' central issues.

Regional observers remain divided over the significance of recent developments and the understandings reportedly reached between the two sides, particularly the Memorandum of Understanding, which U.S. President Donald Trump described as a diplomatic victory. His Democratic opponents, however, dismissed it as “a humiliating defeat” that fell far short of his claim of having resolved the conflict¹.

Concerns nevertheless persist that the negotiations may ultimately focus on managing the conflict and reducing its political, military, and economic costs, rather than resolving it altogether. This reflects the considerable divergence between the strategic objectives of the two parties. While Washington seeks to contain Iran's nuclear ambitions and safeguard freedom of navigation through strategic waterways, including the Strait of Hormuz, Tehran's priorities lie in securing sanctions relief, consolidating recognition of its regional role, and preserving its network of allies and influence across the Middle East.

The analysis suggests that both parties view negotiations primarily as a mechanism for managing influence and containing escalation, even if only temporarily. Such an approach is likely to have repercussions across several interconnected regional issues, with Yemen among the most significant.

Yemen in the Negotiating Calculus

There is no public indications that Yemen has been formally included on the agenda of the U.S.–Iran negotiations. Nevertheless, this should not be interpreted as an indication that either side considers the Yemeni issue insignificant. Yemen may feature in the negotiations through three possible channels:

- **Indirect leverage:** Iran may continue to use the security situation in the Red Sea as a bargaining tool by leveraging its influence over the Houthi movement, whose attacks remain one of the principal threats to one of the world's most strategically important maritime trade routes. In this context, Houthi operations could serve as an instrument of negotiation with Washington. Despite the strategic importance the United States places on maritime security, it may opt to engage directly with the source of the threat—the Houthis—rather than solely with their Iranian backers, as demonstrated by the Omani-mediated understanding reached with the group in mid-2025.
- **Part of a broader regional de-escalation:** The Yemeni conflict may be addressed within wider discussions on regional security and maritime navigation. Under this scenario, any U.S.–Iran understanding could contribute to reducing Houthi attacks in exchange for easing pressure on Tehran.

- **Deliberate exclusion:** Alternatively, Yemen may remain outside the direct scope of the negotiations, leaving its future to ongoing regional diplomatic efforts led by Saudi Arabia and the Sultanate of Oman. While these initiatives have produced only limited progress, they have facilitated several agreements, including prisoner exchanges, and contributed to the ceasefire and de-escalation that began in early 2022.

In sum, Yemen remains a secondary issue compared with the principal items on the U.S.–Iran negotiating agenda. Nevertheless, the possibility of its inclusion cannot be ruled out, particularly if discussions expand to encompass broader questions of regional security and the protection of international maritime navigation.

Iran's Influence over the Houthis

Since emerging as an armed group in northern Yemen more than two decades ago, the Houthis have maintained close ties with Iran, receiving political backing, military training, and logistical support. While the group's leadership characterizes this relationship as a strategic alliance, it consistently maintains that its decision-making remains independent of Tehran, including its decision to join the confrontation alongside Iran against the United States².

The movement has repeatedly declared that it has remained on "maximum alert" since the outbreak of the recent regional conflict in late February, affirming its readiness to intervene "whenever necessary and at a time of its choosing," as part of what it describes as its commitment to supporting the "Axis of Resistance."³

Could a U.S.–Iran Agreement End the War in Yemen?

Any explicit or tacit understandings reached between the United States and Iran could contribute to reducing tensions in several regional conflict zones, including Yemen. However, such agreements are unlikely to bring the Yemeni war to a definitive end.

The principal reason is that Yemen's conflict is rooted in complex domestic political, social, and historical dynamics that extend well beyond the scope of U.S.–Iran negotiations. The war has evolved into a multi-layered conflict, shaped by the interaction of local, regional, and international factors, making it far more than a negotiable bargaining chip between Washington and Tehran.

Should the current negotiations succeed, several indirect implications for Yemen are conceivable. These include a reduction in Iranian support for the Houthis, a decline in cross-border attacks, and the emergence of a more conducive political environment for both domestic and regional peace negotiations.

Future Scenarios

Based on the current trajectory of the U.S.–Iran negotiations, three broad scenarios may shape the future of the Yemeni conflict:

- **De-escalation:** A limited agreement between Washington and Tehran covering multiple regional issues could contribute to reducing tensions and create momentum for renewed Yemeni peace negotiations under regional sponsorship and international support.
- **Conflict Freeze:** Existing understandings could preserve the current ceasefire-like environment, with local actors refraining from major military escalation. Under this scenario, Yemen would remain suspended between war and peace—neither achieving a comprehensive settlement nor returning to full-scale conflict.
- **Renewed Escalation:** If negotiations collapse, the Houthis may resort to renewed military escalation. Escalation could also be driven by growing domestic discontent within Houthi-controlled areas, particularly amid mounting tensions between the group and influential tribal constituencies. These tensions have become increasingly visible through tribal mobilization led by a prominent sheikh in Al-Jawf Governorate, which has reportedly begun attracting support from tribal leaders across several Yemeni governorates.

Conclusion

The ongoing negotiations between the United States and Iran suggest a broader shift in the management of conflicts across the Middle East—from a strategy of direct confrontation toward one of containment and calibrated de-escalation. While this transition may help reduce regional tensions, it is unlikely, by itself, to resolve deeply rooted domestic conflicts such as the war in Yemen, whose trajectory continues to be shaped by complex internal dynamics and regional entanglements.

Accordingly, any durable settlement in Yemen is more likely to emerge from a comprehensive Yemeni–regional negotiating process than from international agreements alone. International de-escalation may create a more favorable diplomatic environment, but it cannot substitute for a political process that addresses the conflict's underlying domestic drivers.

At the domestic level, the Houthis may also face mounting challenges from accelerating tribal mobilization in northern and eastern Yemen. Such developments could complicate the group's ability to provide meaningful support to Tehran should Iran seek assistance in the context of its broader confrontation or negotiations with regional and international rivals, particularly the United States. In such a scenario, the Houthis could find themselves confronting simultaneous pressures on multiple fronts, facing adversaries prepared to exploit emerging opportunities across unexpected theatres of conflict.

References

- 1 “Fragile Truce between the United States and Iran,” [CNN Arabic](#), 29 June 2026.
- 2 “Houthis: We Support Iran, but the Decision to engage in the War Is Independent of Tehran,” [Al Jazeera Arabic](#), 26 March 2026.
- 3 *Ibid.*



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