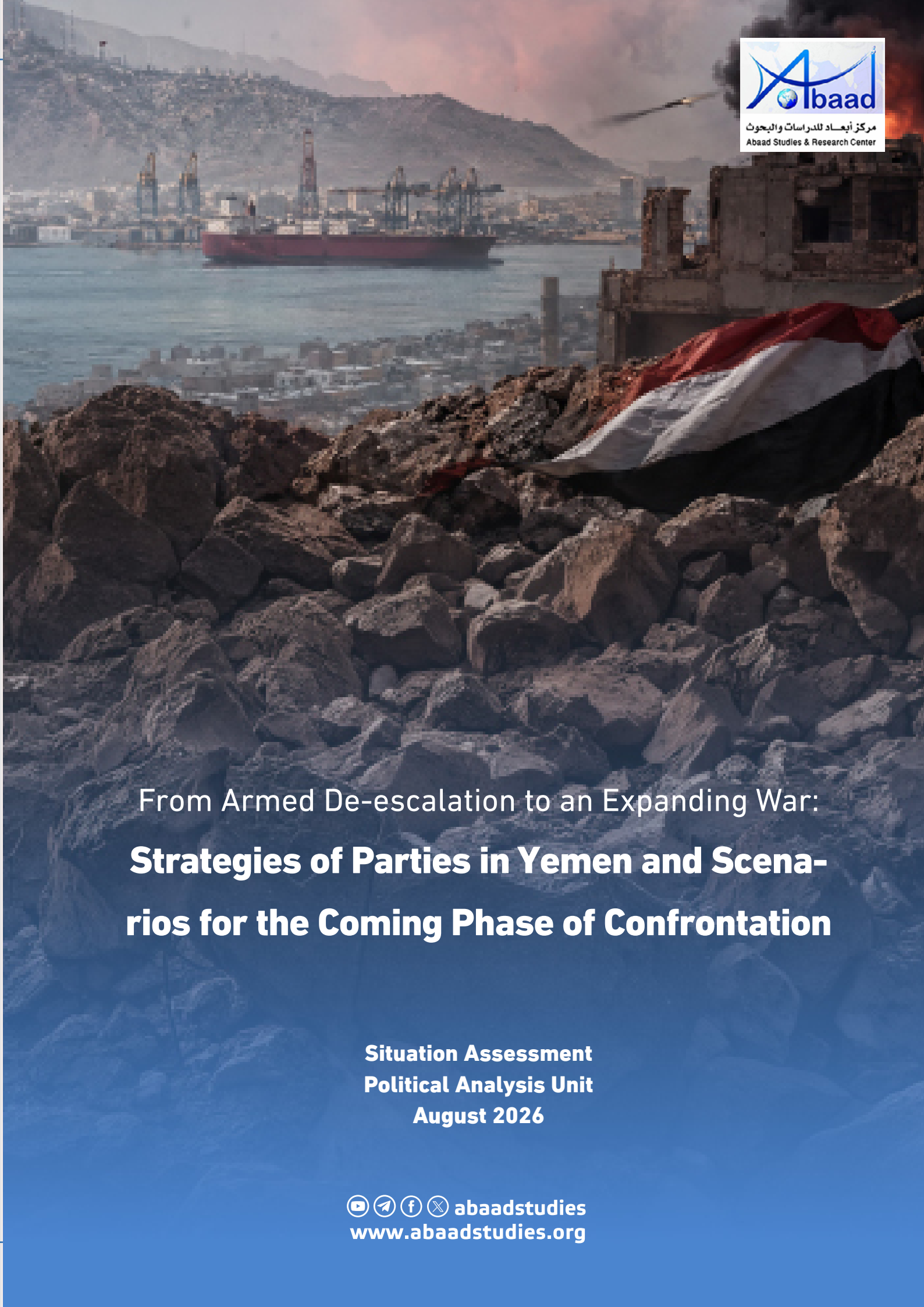




From Armed De-escalation to an Expanding War: **Strategies of Parties in Yemen and Scenarios for the Coming Phase of Confrontation**

**Situation Assessment
Political Analysis Unit
August 2026**

Executive Summary

The current escalation began with a dispute over airspace sovereignty in July. An Iranian aircraft landed in Sana'a on 3 July. On 13 July, the airport runway was struck to prevent another flight that the government considered unauthorized. The incident became a test of who had the authority to control Yemeni airspace. The Houthis responded by attacking Abha airport and other targets in Saudi Arabia. On 20 July, they announced what they described as a maritime blockade targeting Saudi vessels. The escalation subsequently moved from threats to direct coercive pressure. Several vessels were reportedly targeted, although the incidents were verified to varying degrees. Insurance risks increased, some tankers altered course, and targets in Jizan, Yanbu, and Najran came under attack. In August, the confrontation widened to military camps in Marib and Hadramout, the port and city of Mocha, and vessels in Bab al-Mandab, alongside a multi-front government response and more intensive use of drones and artillery.

Developments on 17 and 18 August further increased the pace of the escalation. The Houthis claimed to have targeted a Saudi landing ship and four accompanying boats off Mocha, but Saudi authorities did not confirm the claim. Government sources, meanwhile, said the vessel was locally owned and had been out of service for more than a year for repairs. The following day, government forces announced that they had carried out 133 operations within 24 hours using missiles, artillery and drones. The higher tempo of government operations points to a shift from intermittent strikes to a broad and coordinated cycle of fire. Traffic through Bab al-Mandab nevertheless continued, and the Houthi ban did not become an effective closure. This suggests that the Houthi strategy is designed to deepen uncertainty and raise costs rather than impose conventional naval control.

If this trajectory continues, the new confrontation will differ from the 2015 war in five respects. First, it will be multi-domain, linking missiles, drones, maritime operations, land fronts and the economy in a single operational cycle. Second, it will be geographically dispersed: the war may widen without movement on a principal land front. Third, command, surveillance, supply networks and ports will matter more than rapid advances towards cities.

Fourth, small tactical and one-way attack drones have given government forces an attritional capability that they did not possess to the same extent before the truce. The Houthis, however, retain a longer strike range and a greater ability to disperse their launch systems.

Fifth, the confrontation is highly vulnerable to internationalisation. Any attack on a commercial vessel or energy facility can immediately affect insurance costs, prices, and the positions of states concerned with maritime security.

The most likely scenario over the next three to six months, with an estimated probability of 45 per cent, is a limited but prolonged hybrid war: reciprocal strikes, maritime and coastal activity, and attrition across several fronts without a campaign to seize Sana'a or Hodeida. The second scenario, assessed at 25 per cent, is a limited government offensive focused on securing Mocha, southern Hodeida and the highlands west of Taiz, possibly accompanied by increased pressure in Marib or Al-Bayda. A temporary negotiated freeze is assessed as having a probability of around 20 percent. This would depend on Omani-UN mediation producing a package that links an end to attacks with arrangements for the airport, ports, salaries, and oil exports. A wide Yemeni war directly connected to the regional conflict remains the least likely scenario, at 10 per cent, but would have the greatest impact. It could begin with a single high-casualty incident rather than a pre-planned political decision.

Methodology and Limits of Assessment

This study monitors developments from 3 July to 21 August 2026. It draws on official statements, interviews conducted by researchers at the Abaad Studies and Research Center, open sources, and cross-checked media reports. Wherever possible, it distinguishes confirmed facts from claims by the parties and from analytical assessment. The scenario probabilities are indicative judgements, not statistical findings. Some battlefield developments may require revision as new information emerges.

From De-escalation to an Expanding War

The years following the April 2022 truce did not bring peace; they brought a period of reduced violence. Large-scale air campaigns and cross-border attacks largely stopped, and front lines froze, while the disputes over power, weapons, revenues, salaries, airports and ports remained unresolved. Each side used the relative calm to reorganise its capabilities. The Houthis accumulated missile and maritime expertise and consolidated their rule in Sana'a and the north-west, while government forces rebuilt units, drone capabilities and operations rooms and held their positions in Marib, the south, the east and the western coast. The resulting state of "no war, no peace" was based on fragile deterrence. It was closer to a behavioral truce than a political agreement. Each side refrained from crossing certain thresholds as long as the other side did the same.

Four thresholds collapsed simultaneously in the summer of 2026. The first was the airspace threshold. Direct flights operated between Tehran and Houthi-held territory without government approval. Sana'a airport was subsequently targeted, and an aircraft later landed in Hodeida. The second was the border threshold, following the resumption of missile and drone attacks on Abha, Najran, Jizan and Yanbu. The third was the maritime threshold, after the Houthis announced a selective ban on Saudi shipping and began targeting tankers, vessels and facilities in Mocha. The fourth was the domestic-front threshold, after large-scale attacks on camps in Marib and Hadramout and a multi-axis government response.

At its 13 July session, the Security Council warned that unilateral actions were accelerating the slide back towards confrontation. On 7 August, the Council condemned the Houthis for operating flights with Iran without the approval or authorization of the Yemeni government.^{[1][2]}

The return to war can be assessed against four indicators. The first is sustained violence: do attacks evolve from isolated incidents into a daily or weekly campaign? The second is the expansion of the theater of conflict: do Marib, Taiz, Hodeida, and Mocha become increasingly connected to the Red Sea and the Saudi border? The third is the scale of mobilization and command: are joint command structures, reserve units, and continuous supply networks being activated? The fourth is the erosion of political constraints: do the Muscat channel, the Military Coordination Committee, the detainee file, and economic negotiations become disrupted?

By 19 August, the first two indicators had been met to a significant degree, clear progress had emerged on the third, while the fourth remained incomplete.

Based on the available indicators, Yemen has moved from “armed de-escalation” to a “limited but expanding war.” The confrontation is becoming increasingly self-reinforcing: one strike prompts a response, the response expands the target set, and the widening scope of operations reduces the ability of mediators to restore the previous status quo. A new military confrontation can therefore be said to have begun, but its transformation into a full-scale war remains a matter of political choice and possibility rather than an accomplished reality.

Escalation Path and Turning Points

The Iranian flight to Sana'a on 3 July marked the start of an interconnected sequence. For the government and Saudi Arabia, the flight was not simply the transport of a delegation, but an exercise of sovereignty by a de facto authority and the possible opening of an air bridge with Tehran. For the Houthis, operating the airport without Aden's approval demonstrated their claimed right to administer the territory under their control. When the runway was struck on 13 July, the sovereignty dispute turned into cross-border deterrence. The Houthis launched missiles and drones towards Abha, announced the end of de-escalation, and formulated the equation: "airport for airport, port for port, blockade for blockade".

The announcement on 20 July marked the second turning point. The Houthis do not possess a naval fleet capable of imposing a blockade in either legal or practical terms. However, they operate a system designed to restrict access to the coast. This system includes missiles, drones, boats, radars, and sensors. They can also use information on vessel ownership and commercial shipping routes to identify and pressure selected maritime traffic. This system has enabled them to create a "risk-denial zone". They do not need to strike every vessel; one verified hit and credible warnings are enough to force insurers and operators to reprice passage. The ban's economic and psychological effects have therefore been greater than its ability to close the route physically.

The third shift came on 24 and 25 July, when the coalition and the Houthis exchanged strikes between Hodeida, Kamaran Island and Saudi energy facilities, while air power was used against launch sites and storage facilities in Marib and Al-Jawf. From that point, the crisis was no longer bilateral between Riyadh and Sana'a; the government and domestic front lines had been reintegrated into the deterrence cycle.

On 30 July, Saudi Arabia announced a multinational maritime umbrella, the Saudi-led "Red Sea Defensive Maritime Coalition". Pakistan was selected as deputy alongside 11 other states, including most Red Sea littoral countries, among them Egypt, Somalia, Djibouti, Comoros and Jordan. The framework remains political and defensive until its operational structure and rules of engagement become clear, but it showed that Riyadh seeks to turn the protection of navigation from a Saudi burden into a shared interest.

August then transformed gradual escalation into a multi-theatre confrontation. Houthi strikes targeted camps in Marib and Hadramout on 6 and 7 August, followed by repeated attacks on Sahn al-Jin, Tadawin and other sites, including displacement camps. Mocha came under missile and drone attack from 9 August; its port suffered heavy damage and civilians and soldiers were killed. On 11 August, sailors and rescue personnel were killed in an attack on the vessel *Tihama*, the first known fatal maritime incident of the 2026 round.

Government forces, in turn, began striking command centres, fortifications and launch systems in several governorates from 8 August, and on 18 August announced 133 operations in a single day. Whatever the debate over how those operations were counted, the figure reflects a clear increase in the tempo and daily coordination of military activity.

By 19 August, the territorial map had not changed strategically. Marib, Mocha, Hays and Al-Khawkhah remained under the control of the government and its allies, while Hodeida, Sana'a and most of the north-west remained under Houthi control. Yet the absence of a ground advance does not mean that the military balance is static. The cost to Houthi command structures has risen. Monitoring of funeral ceremonies indicates that the group buried 96 members during the first half of August, including 55 rank-holders and 30 colonels and brigadier generals. This unusual concentration is consistent with the increased targeting of operations rooms, firing positions and reinforcements by government drones. It is twice the toll recorded in the preceding month of July and the movement's highest loss on domestic fronts since its failed attempt to seize the strategic city of Marib in 2021.

Strategic Context of the Escalation

Yemen's strategic value has increased because the crises in Hormuz and Bab al-Mandab are unfolding simultaneously. Disruption in Hormuz has raised the importance of Saudi Arabia's East-West Pipeline and the port of Yanbu, making the Red Sea a vital outlet that reduces the exposure of Saudi exports to pressure in the Gulf. The Red Sea carries around 7 per cent of global energy supplies, while Saudi Arabia has redirected a significant share of its exports to Yanbu. The Houthis have consequently acquired the ability to threaten the alternative route intended to mitigate Iranian pressure in Hormuz.^[3]

The ability to disrupt is not, however, the ability to close. Data published on 18 August recorded 254 confirmed transits through Bab al-Mandab between 10 and 16 August, a slight increase on the previous week despite the attacks and disruption at Mocha.^[4]

This creates a clear paradox: the Houthi ban has not turned the strait into a closed zone, but it has imposed a risk-sorting system based on ownership, cargo, previous port of call and destination. This is "sovereignty through risk", not sovereignty through law or a fleet. Its effects are more visible in insurance costs, route diversions and delays than in the number of ships hit or sunk. Those costs will ultimately feed into commodity prices inside Yemen, including in Houthi-held areas.

Domestically, the government entered the escalation from a position of acute economic weakness. The World Bank reported that revenues of the internationally recognised government fell by 30 percent year-on-year in the first half of 2025. The decline was linked mainly to reduced grants and the continued halt in oil exports. This weakened the government's ability to pay salaries and maintain public services. At the same time, monetary and institutional divisions between Sana'a and Aden became more entrenched. More than 22 million Yemenis require humanitarian assistance, while 18.3 million face acute food insecurity. International and UN organisations have also faced an almost year-long suspension of operations in Houthi-held areas. This is not a separate humanitarian backdrop but part of the balance of power: the ability to pay salaries, finance fuel and protect ports determines whether any military campaign can be sustained.^{[5][6]}

The Yemeni theatre is no longer governed by a bilateral relationship. Iran, the United States, Israel, the Gulf States and Oman are direct or influential actors, while Türkiye, Pakistan, Egypt and China approach the crisis through the security of maritime corridors or the political process. The number of actors expands the deterrent resources available, but also increases the risk of divergent rules of engagement and misread intentions. A limited maritime incident could therefore have consequences far beyond its immediate military value and trigger a broader international crisis.

Balance of Power and Geography

The Houthis retain several relative advantages. These include centralised decision-making, accumulated combat experience, and the ability to conceal and disperse their capabilities. They can also operate across mountainous terrain and along Yemen's long coastline. In addition, they can extend the conflict into the Gulf and the Red Sea. This gives them some ability to choose the timing of escalation and impose costs on a technologically superior opponent. They do not, however, possess air or naval superiority, cannot protect every depot, radar and launch team from surveillance and strikes, and replace specialised personnel more slowly than they recruit new fighters.

Saudi Arabia and government forces have advantages in aerial surveillance, precision munitions, air defence and logistics. Government-held islands and ports, from Mayyun to Mocha, Aden and Mukalla, provide a potential early-warning and support network. Firepower superiority does not automatically translate into victory, however. Houthi launchers are mobile and have low signatures; many targets are dual-use and close to civilians; and holding territory requires disciplined forces, civilian administration and sustained financing. The experience of the 2015 war demonstrated that destroying targets is not the same as dismantling the group's military and political system.

The most important new variable is the spread of tactical and one-way attack drones among government forces. These systems are relatively inexpensive, shorten the chain from detection to strike, and make it possible to target a field commander, guidance vehicle or gun behind the line rather than exchange broad artillery fire. If integrated with advanced strategic drones, electronic-warfare systems, artillery and joint operations rooms, they could change the cost ratio on the fronts and make ground movement easier. They cannot, however, enable the government by themselves to seize major cities. They are a means of stripping away defences, disrupting command and protecting limited advances, not a substitute for infantry, engineering, logistics and local support.

The geography favors a war without a single centre. Marib is a hub of energy, population and government depth; Hadramout combines resources, borders and supply routes; Mocha is the gateway to Bab al-Mandab and the coast's principal base; southern Hodeida is Mocha's rear; Taiz is a network of highlands and roads; Al-Jawf is a combustible tribal and desert arena; and Al-Bayda links north, south, east and west. Either side can activate a front to pin down the opponent's forces without making it the decisive axis.

Houthi Strategy

The Houthis' strategic aim is not merely to prevent a government ground offensive that the movement expects, or to lift what it calls the blockade. It is to convert military control into sovereignty recognised in practice. They want to administer Sana'a airport, Hodeida's ports and the economy in their territory without government oversight; secure salaries, resources and reconstruction funding; and compel Saudi Arabia to treat them as a peer with veto power over Yemeni and regional security. They favor bilateral or regional negotiations that reduce the Yemeni government to a Saudi-backed party. This would give them greater political parity with the government and shift greater financial responsibility for areas under their control to Riyadh.

Houthi officials describe their first instrument as "reciprocal deterrence." Their concept of "escalation for escalation" establishes a simple response principle: actions against their areas or interests are met with corresponding actions against their opponents. Restrictions on ports, for example, may be met with pressure on Saudi-linked maritime traffic. This formula gives the group flexibility to present every strike as retaliation and assign responsibility for initiating the cycle of violence to its opponents. It is also a negotiating tool, as each track can be halted in return for a defined concession.^[7]

The second instrument is selective maritime pressure. The Houthis understand that a complete closure of Bab al-Mandab would unite major powers against them and deplete their resources, so they prefer ambiguity and selection. They declare international navigation open while expanding the definition of “Saudi linkage” through ownership, destination, cargo or previous port of call. This allows them to negotiate the passage of individual ships, neutralise China or other parties, and encourage the market to isolate Saudi ports on its own. The objective is therefore less about establishing conventional control of the sea than about acquiring an informal ability to shape perceptions of maritime risk in the Red Sea. This is broadly consistent with the objectives pursued during the group’s Red Sea campaign in 2023–2025, which served both its domestic political position and its leverage in negotiations, rather than representing regional solidarity alone.^{[8][9]}

The third instrument is pressure on the government’s strategic depth. The targeting of military positions and logistical hubs in Marib, Hadramout, and Mocha is intended to constrain government forces before they can develop a broader ground offensive. The selection of these areas is not accidental. Marib is a command and resource hub and a route linking Al-Jawf with Shabwa, Al-Bayda and Hadramout. Pressure there can disperse government capabilities and limit the use of the area as a secure base for offensive operations. Mocha, meanwhile, combines a commercial port, a base for Tariq Saleh’s forces, and proximity to Bab al-Mandab. Pressure on Mocha, together with developments around southern Hodeida and Al-Barah, can weaken the government’s coastal position and complicate efforts to strengthen maritime security.

The immediate Houthi objective is therefore likely to be isolation and exhaustion in preparation for capturing the two cities as quickly as possible, without confronting every front simultaneously. On secondary fronts in Taiz, Al-Dhalea, Lahj, Abyan and Shabwa, skirmishes serve to pin down reserves. The Houthis need to keep their opponents dispersed so that brigades cannot be moved from a quiet axis to the coast or Marib. For them, war is a network of pressure: a front’s value lies not only in the territory it gains, but in the forces it prevents the adversary from moving.

The fourth instrument is the integration of external war with domestic control. The movement uses war to tighten security measures, surveillance and arrests, aware that a multi-front confrontation could generate broader protests or push some tribes to rebel. It has also expanded public mobilisation, recalled graduates of its “Al-Aqsa Flood” courses, and brought institutions, tribes, schools and religious events into its war narrative.

This provides manpower, builds a mandate for the group's leader, and redirects anger over salaries, services and levies towards confrontation with Saudi Arabia. The approach overlaps with Iran's objectives. Tehran provides technology, expertise, funding and supply channels, integrating Houthi-held geography into its regional deterrence architecture. A Reuters report that between 10 and 21 Islamic Revolutionary Guard Corps personnel and advisers, as well as missile and drone components, were transported on the 13 July flight, despite Houthi denials, provides a strong indicator of this enabling role. The reported instruction to prepare to close the Red Sea route if Iran's electricity network were attacked also places Bab al-Mandab on Iran's escalation ladder.^{[10][11]}

This strategy has clear strengths: rapid centralised decision-making, flexibility between maritime, land and border theatres, an asymmetric arsenal, experience in concealing targets, and the ability to construct a narrative linking the movement's demands to Palestine and the "Axis of Resistance". It also has five weaknesses. First, liquidity shortages, poor front-line provisioning and growing dependence on levies under US sanctions. Second, waning tribal willingness to support a long domestic war amid deteriorating living conditions and accumulated failures of governance. Third, the potential loss of specialised personnel in command, missile and artillery units following US and Israeli attacks during 2024-2025. Fourth, the difficulty of maintaining the accuracy and volume of launches while lacking specialised front-line means to counter government drones. Fifth, killing sailors or striking ships with no clear connection to the declared ban undermines the distinction the Houthis seek to draw between selective coercion and attacks on international trade. The deaths of the *Tihama* crew illustrate this dilemma: the wider the ban list, the greater the likelihood of error and the greater the prospect of intervention by states whose ships or citizens are harmed.^[12]

The group can therefore ignite a broad war and disperse its opponents across multiple fronts and threats, but it is less capable of sustaining a decisive, long war on several fronts. Its optimal course is to keep the level of violence high enough to impose terms but low enough to prevent the formation of a broad offensive coalition.

The most dangerous possibility for the group would be the simultaneous application of sustained coastal and ground pressure alongside intensified efforts to disrupt its command and control. Such a situation would force it to balance its regional deterrence posture against the need to protect its positions on Yemen's internal fronts.

Strategy of the Internationally Recognised Government

The government seeks to achieve three interconnected objectives: restore sovereignty as the central issue in the conflict, prevent the Houthis from establishing a veto over oil exports, ports, and airspace, and demonstrate that it is itself a principal actor in both war and peace rather than an appendage to Saudi-Houthi negotiations.

The decision to strike Sana'a airport, followed by meetings of the National Defense Council, heightened military readiness, and declarations of a response across multiple fronts, represented a shift from accepting the existing balance toward an effort to regain the initiative in the current conflict.

Operationally, the government has moved from localised defence to what may be described as “coordinated active defense”. Any Houthi attack on one front is treated as an attack on the entire system, prompting units in Marib, Taiz, the coast, Al-Dhalea and Al-Jawf to respond within a similar timeframe. The announcement of 133 operations within 24 hours on 18 August, together with the army's 8 August statement that it would respond across several axes and the appointment of a new military spokesperson, reflects a desire to demonstrate joint command and force the Houthis to defend multiple areas. The number alone does not represent a strategic transformation, since it may include small strikes and dispersed clashes. Nevertheless, the simultaneous activity increases the cost of concentrating Houthi capabilities in any single theater and suggests a more coordinated operational posture rather than an immediate attempt to seize large areas. [\[13\]](#)[\[14\]](#)

The second line of effort is to strike the chain of command rather than merely attrit infantry. Government forces are using drones, surveillance and artillery against operations rooms, artillery positions, missile vehicles and reinforcements before they arrive. The resulting wave of Houthi funerals has given the government a means of opening a window for limited ground manoeuvre. The initial objectives are most likely to be high ground, corridors and positions that secure Mocha, Hays, Al-Barh and Marib before any decision to advance towards Sana'a or Hodeida city. The success of this approach, however, must be measured by the adversary's behaviour, not by video footage. Does the tempo of attacks slow? Is coordination among Houthi axes disrupted? Does the accuracy of fire decline? Can government forces hold limited territory after capturing it? If the Houthis continue replacing commanders, dispersing operations rooms, and using camouflage and jamming, drones may remain a useful tool of attrition without producing a decisive effect.

The third line of effort is to turn the coast into a forward defensive zone. Mocha is not only a commercial port; it is a supply centre for coastal forces, a monitoring point for the strait and a partial alternative to Hodeida's ports. Protecting Mocha, Mayyun and Al-Khawkhah, and striking launch systems and boats before they approach, gives the government a direct role in maritime security and ties its legitimacy to an international interest.

The fourth line of effort is economic and political. The Iranian-flight crisis gave the government a clear sovereignty issue: a de facto authority cannot open an air bridge without state approval, especially amid suspicions that advisers and equipment are being transported. Attacks on navigation and Mocha also allow the government to seek maritime, intelligence and financial support under the banner of protecting trade, not merely retaking Sana'a. The government needs to resume oil exports to finance salaries and services and stabilise the currency. It therefore regards Houthi attacks on export terminals as a financial blockade of the state. Securing Al-Dabbah, Al-Shihr or Al-Nashimah could improve its revenues and reduce dependence on grants, but it could also prompt the Houthis to repeat their 2022 attacks on infrastructure.

The oil war is thus inseparable from the ground war. Restoring revenue has little value if ports remain within Houthi strike range and attacks on them do not impose a prohibitive cost on the group.

The government's strategy faces structural constraints. Although the UAE-backed Southern Transitional Council has been dissolved and Emirati forces have left the country, the multiplicity of formations and loyalties does not disappear merely because joint operations rooms are created. Competition over land and resources may re-emerge after any advance. Simultaneous operations require communications, ammunition, medical evacuation, engineering and civilian administration, not firepower alone. Alternative port plans and measures to absorb economic shocks are therefore essential: every civilian casualty or service failure in government-held areas weakens the narrative of restoring the state. If the war appears to be a Saudi project implemented by Yemeni forces, the Houthis will exploit that perception for mobilisation. The government consequently needs visible Yemeni political leadership, limited and publicly stated objectives, and a plan to administer any territory it recovers.

Saudi Strategy

Saudi Arabia's priority is to prevent Iran and its allies from acquiring the ability to exert simultaneous pressure on Hormuz and Bab al-Mandab. Protecting Yanbu, Jazan, the East-West Pipeline and Red Sea export route, airports, and desalination facilities is not a secondary Yemen-concern; it is central to protecting the Saudi state model and its economic transformation. Prolonged disruption would raise insurance costs, put pressure on revenues, tourism, and investment, and force Riyadh to distribute its defenses across the eastern, southern, and western fronts. If the Houthis establish persistent risk in Bab al-Mandab and the northern Red Sea, Saudi Arabia would face a form of double-hedging failure: disruption in the eastern corridor and a costly, attack-prone western route.

Riyadh is following a layered escalation ladder. The first layer comprises air defence and protection for facilities, airports and pipelines, followed by maritime surveillance and intelligence sharing through new coalitions. Next come selective strikes on radars, launch systems, boats and storage sites, as seen in the attacks on Hodeida and Kamaran Island. Ground pressure would be carried out by Yemeni forces with Saudi support, giving Riyadh greater political and diplomatic room for maneuver, reducing its direct exposure and providing the operation with local legitimacy. The Omani channel remains a means of transmitting messages and creating an exit once the kingdom has achieved the deterrence it seeks. If the conflict continues, it could ultimately produce a narrow security arrangement in Yemen that postpones a broader war, as happened in 2022.

Saudi Arabia has also sought to internationalize the cost of maritime security in Bab al-Mandab without fully internationalizing the decision to wage war. It announced the establishment of a Saudi-led maritime defense framework following a meeting involving 43 countries and the European Union, with the stated objective of information-sharing and strengthening the defense of the Red Sea, Bab al-Mandab, and the Gulf of Aden. On 7 August, Saudi Arabia, Türkiye and Pakistan signed the Mecca Joint Defence Agreement, under which an attack on one is considered an attack on all. Both steps seek to reduce exclusive reliance on the United States and signal that attacks on the kingdom could activate a wider network. Arab, Asian and African participation in a maritime framework conveys that the threat concerns international trade, not Saudi Arabia alone, while distributing the burdens of surveillance, rescue and protection. Political deterrence nevertheless precedes operational capability: participants may accept defensive missions while rejecting strikes inside Yemen, and their rules of engagement may differ.^{[15][16]}

Saudi Arabia's dilemma is that a limited response could be interpreted by the Houthis as weakness, while a broader response could expand the range of threats facing Saudi coastal projects, airports, desalination facilities, and energy infrastructure. A prolonged air campaign might destroy military infrastructure without ending launch capability and would intensify humanitarian pressure. The most coherent Saudi approach is therefore sustained deterrence focused on denying the Houthis strategic effect: lower-cost defences, rapid repair, dispersed stockpiles, cyber and communications security, and attacks on the surveillance and command chain, combined with verifiable political conditions.

Iranian Strategy

Iran regards Yemen as strategic depth from which it can exert pressure on Bab al-Mandab and draw its adversaries' resources away from Hormuz. The Houthis' value to Tehran lies not only in carrying out day-to-day instructions, but in being a local actor with its own motives and organisational legitimacy that can threaten energy and trade at a lower cost than direct Iranian intervention. Iran contributes technology, training, intelligence, components and smuggling networks, while the Houthis provide territory, personnel and local operational decision-making.

In the context of the 2026 war, the two-straits equation serves a clear Iranian objective: if Tehran comes under pressure in Hormuz, Bab al-Mandab becomes an instrument for raising costs for the United States, Saudi Arabia and the global economy.

Neither strait needs to be closed. It is enough to make both routes unreliable at the same time. Houthi pressure also gives Iran leverage in any regional negotiation, disperses its adversaries' naval and air defences - especially those of Saudi Arabia - and preserves a margin of deniability over individual operations.

Tehran exerts extensive influence over Houthi command and weapons systems, but the group retains local objectives and calculations of its own. It may continue escalating after an Iranian agreement, or reduce escalation if it judges that its immediate interests - particularly the use of the Red Sea as political leverage - are threatened. A US-Iranian understanding alone is therefore insufficient to end the Yemeni war, even if it reduces the regional drivers. Conversely, Iran may push the Houthis towards a harder line without being able to stop a campaign that has subsequently become tied to local demands, including airports, ports and Saudi financial responsibility for Houthi-held areas.

Iran is also attempting to coordinate pressure from Iraq and Yemen to encircle Saudi Arabia from north and south. Yet Saudi-US deterrence - including strikes on the Popular Mobilisation Forces after the Houthis claimed attacks on oil facilities in eastern Saudi Arabia that Riyadh said had been launched from Iraq - and growing Saudi coordination with the Iraqi government to disarm those militias limit the effectiveness of an “Iranian pincer” against the kingdom.

Iran’s likely interest is to preserve the Houthis as a strong and durable instrument, not expend them in a war that threatens their rule. It therefore prefers calibrated escalation that pressures Saudi Arabia without sinking Chinese vessels or creating an international consensus for a large campaign. This strategy is endangered if the Houthis lose the ability to discriminate accurately, if supply networks are effectively targeted, if the war shifts to domestic fronts that drain manpower and funds, or if Beijing and other Asian capitals conclude that the maritime campaign directly threatens their security.

Roles of Regional and International Actors

Oman remains the principal mediator because it retains channels with Saudi Arabia, Iran, the Houthis and the United Nations. Its role has nevertheless shifted from attempting to build a peace roadmap to managing the risk of a slide into full-scale war. Its confidence in Iranian and Houthi commitments has also declined amid the rejection of compromises over airports, ports and salaries and the continuation of escalation. The UN envoy’s warning on 13 August that the risk of a wide war had reached its highest level since the 2022 truce reflects the erosion of conflict-management tools, not the definitive failure of mediation.

The United States does not appear eager to open a new air campaign against the Houthis while its conflict with Iran continues. It cannot, however, ignore the killing of sailors or threats to the alternative oil-export route to Hormuz. Washington is therefore likely to press Saudi Arabia and the Yemeni government to limit the scope of the war while providing intelligence, air defence and maritime protection, and precise strikes when necessary, without an apparent objective of overthrowing Houthi rule in Sana’a. The Trump administration may see decisive support for a wide Saudi-Yemeni campaign as creating a difficult trade-off between containing the Yemen front and protecting an ally under attack. The 2025 US-Houthi cease-fire, together with US caution about widening the war, may create a gap between Riyadh and Washington.

The United Arab Emirates, through its previous influence on the coast and among local forces, could affect any operation around Mocha and the islands. Its calculations regarding Saudi leadership and southern Yemen's political arrangements, however, preclude assuming full alignment. Its absence from the list of founding members of the Saudi maritime coalition does not indicate opposition to freedom of navigation, but suggests that Abu Dhabi wants an understanding on the influence of its former local partners in southern Yemen before committing to military coordination alone.

China and other Asian states approach the crisis primarily through continuity of energy supplies. Practical negotiations over the passage of specific vessels may protect short-term shipments, but they also grant the Houthis functional recognition of their ability to classify traffic and weaken the principle of freedom of navigation. The United Nations retains a previous military channel through the coordination committee, as well as political and economic tracks, but lacks enforcement power.

Pakistan, Egypt, Türkiye and the Horn of Africa states carry more than symbolic political weight in any maritime framework. Pakistan can provide naval expertise and channels to multiple parties; Egypt regards Bab al-Mandab security as a direct extension of Suez Canal security; and Türkiye has drone and naval capabilities that can be used for surveillance and protection. Their interests do not, however, imply readiness to fight a war inside Yemen. They are more likely to prefer escort, rescue, air-defence and training missions. If attacks on shipping routes, vessels and Saudi interests persist, however, a response different from those the Houthis have previously faced may take shape.

Characteristics of the Next War

The next war will not be a continuous front moving from east to west, but a “network war”. The contest will be over who sees first, who connects information to weapons faster, and who preserves communications and supplies under pressure. Each side will try to break the other's chain: radar, surveillance, the transmission of coordinates, command, the launch platform and finally battle-damage assessment. Operations rooms, operators, antennas, roads and depots will therefore be more important targets than isolated earthworks.

The western coast is likely to be the centre of gravity. The Mocha-Dhubab-May-yun-Hays-Al-Khawkhah axis connects the maritime and land theatres. Facing it is a Houthi depth extending from southern Hodeida to Al-Jarrahi, Maqbanah and Al-Barh. The Houthis can disrupt regular operations at Mocha port with missiles, drones and boats, paving the way for greater pressure on the coastline near Bab al-Mandab. Government forces, in turn, will try to establish a belt that pushes launch systems farther away and monitors maritime approaches. The contest is therefore likely to centre on high ground, launch areas and supply routes, while Houthi operations against the port, vessels and rescue teams remain a continuing threat.

In Marib and along supply lines and camps in Hadramout, the conflict is likely to be a war of depth and fire rather than an immediate assault. The government will seek to protect the city, fields and camps and carry out pre-emptive strikes against Harib, Al-Jubah, Majzar and Al-Jawf. If Al-Jawf or Al-Bayda becomes an organised manoeuvre axis, pressure on Sana'a and connecting routes could change. Terrain, tribal dynamics and logistics nevertheless make a rapid government advance unlikely.

The fronts in Taiz, Al-Dhalea, Lahj and Abyan will remain theatres of attrition and force fixation. Night infiltration, sniping, mortars and small drones can inflict casualties and expose positions without changing control. These fronts become strategic only if pressure on Jabal Han, Hayfan, Al-Barh and Maqbanah coincides with an attempt to cut a road or move heavy units. Otherwise, their purpose will remain to prevent the adversary from concentrating reserves on the coast or in Marib.

Economic warfare will be part of operations, not a secondary consequence. Ports, flights, salaries, the exchange rate, oil exports and insurance are simultaneously military and negotiating targets. The Houthis can threaten government export terminals and Saudi vessels; the government and Saudi Arabia can apply pressure through the airport, transfers, ports and financing networks. Yet this is the domain that harms civilians most quickly. Yemen is heavily dependent on imports, and any rise in shipping costs or disruption at Hodeida and Mocha is converted into higher prices, hunger and shortages of medicine.

The war comes at a moment when society has no margin for further shocks. The United Nations reported on 13 August that more than half the population faced acute food insecurity, six million were at emergency levels, and the humanitarian appeal was only around 20 per cent funded. The Houthis also continue to hold 73 UN staff, weakening access and information. Any port disruption or increase in insurance costs will multiply food and fuel prices, strain hospitals, water and transport, and increase displacement and recruitment driven by need.

Areas controlled by both parties will pay the price. In government-held territory, war will put further pressure on the rial, electricity, salaries and oil exports. In Houthi-held areas, it will mean reduced liquidity, higher levies, poorer services and greater difficulty financing the fronts. Each side may try to turn suffering into an accusation against the other, but the dual war economy creates a cycle that sustains the conflict: poverty facilitates recruitment, fighting disrupts revenue, and lost revenue increases levies, anger and repression.

Early-Warning Indicators

The principal indicators to monitor are: the movement of ammunition, engineering units and medical-evacuation capacity to the coast or Marib; strikes on command rooms and launch systems continuing for several days; the deployment of additional launch systems in Al-Jawf, Saada and along the coast; increased activity by boats and maritime drones near Bab al-Mandab; and the emergence of new arrangements governing flights, ports and salaries. The first three indicators would point towards a wider military operation, while the last would suggest movement towards a negotiated freeze. A high-casualty strike on a large vessel or energy facility could move the confrontation to the regional level.

Likely Scenarios and Outcomes in the Coming Months

Scenario One: A Limited and Protracted Hybrid War

Missile and drone attacks continue against Mocha, Marib and Saudi border targets, alongside attempts to strike selected vessels. The government responds with synchronised operations and strikes on command targets, while Saudi Arabia conducts calibrated coastal strikes and provides maritime protection. No major territorial advance occurs, but casualties increase and the economy erodes. This scenario is supported by the fact that all parties derive negotiating pressure from it at a lower cost than full-scale war, and that the Muscat channels remain open. Its indicators are a sustained tempo of fire while major ports remain open and no enduring heavy ground mobilisation appears.

Scenario Two: A Limited Government Offensive on a Coastal-Land Axis

Houthi losses and the requirement to protect navigation drive the government towards a campaign focused on southern Hodeida and western Taiz, possibly accompanied by increased pressure in Marib or Al-Bayda. The campaign uses drones, jamming and artillery to paralyse command ahead of local advances towards high ground, roads and launch areas rather than immediately towards Sana'a. It could make local gains and improve the security of Mocha, but would prompt a stronger Houthi response. Its indicators would include the formation of a joint government ground command; movement of ammunition and medical-evacuation capacity; persistent surveillance; and preparatory strikes lasting several days by government drones with greater range and payload, or by combat aircraft the government says it possesses.

Scenario Three: A Temporary Negotiated Freeze

This scenario assumes that Oman and the United Nations reach an interim package covering: an end to attacks on vessels, Saudi facilities and Mocha; reduced strikes and mobilisation; scheduled civilian flights from Sana'a under a legal and technical arrangement that preserves the Yemeni government's sovereignty over airports and ports while giving the Houthis an acceptable exit; continued entry of goods through Hodeida; a mechanism for oil revenues and salaries; and partial implementation of the prisoner agreement. This would not be a peace settlement, but a rebuilt ceiling for de-escalation. It is obstructed by the Houthi demand for unilateral administration and the government's refusal to grant implicit recognition, but could become possible if tensions in Hormuz decline and both parties need a face-saving exit.

Scenario Four: A Wide Yemeni and Regional War

This scenario begins with the sinking of a large tanker, a high death toll at a facility or aboard a military vessel, serious disruption to an oil facility or desalination plant, or the maritime coalition's entry into offensive strikes. Saudi Arabia and the Yemeni government then conduct a systematic campaign against command structures, radars, missiles and boats in Sana'a, Saada, Hajjah and Hodeida. The Houthis respond with intensive attacks against Jizan, Najran, Yanbu and possibly more distant targets, alongside large-scale escalation on domestic land fronts. This is the least likely scenario because the parties understand its cost, but it could arise from miscalculation more quickly than mediators can intervene.

Conclusion and Policy Priorities

None of these scenarios is likely to produce a decisive resolution of the Yemeni conflict within a matter of months. Even a successful campaign could redraw limited front lines without bringing down the Houthi authorities, while success in exerting maritime pressure would not provide the group with legal recognition. The most likely result is a new and more violent deterrence equilibrium, or a temporary deal that postpones the contest over sovereignty and resources. Sustainable peace would require moving negotiations from a bilateral track to a Yemeni process that includes state institutions and local forces and addresses weapons, revenues and governance arrangements.

The immediate priorities should be to unify command and communications among government forces, protect ports and energy facilities through cost-effective defensive measures and contingency operating plans, link any ground movement to a clear plan for administration and public services, and maintain a negotiating channel capable of preventing maritime incidents from escalating into a regional war. Reducing the humanitarian cost requires protecting civilian ports and food and medicine routes, and establishing a verifiable mechanism for salaries and revenues without granting any party unilateral authority over navigation or airspace.

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