

Houthi Takeover of Bab al-Mandab:

Shifts in the Balance of Power in the Red Sea

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Abstract

The Houthi takeover of Mocha, Dhubab and Mayyun Island has reconnected the trajectory of Yemen's war to the dynamics of regional security and international navigation. The advance has both weakened one of the principal centers of anti-Houthi power and expanded the group's presence at the southern entrance to the Red Sea. Its strategic significance lies in the possibility of combining territorial control with the ability to disrupt maritime operations to alter the terms of negotiation with the Yemeni government, Saudi Arabia and international powers.

The study argues that the political value of this shift depends on the Houthis' ability to consolidate and administer their gains and convert them into durable influence. Control of Yemen's coastline and islands enhances surveillance, threat capacity and the ability to impose costs on transit, but it does not amount to a monopoly over the maritime domain or a sustained ability to close the strait. Likewise, the loss of a government military hub does not mean that the formations that defended it have ceased to exist, although it weakens their operational and negotiating position.

In the near term, the study considers it likely that the Houthis will seek to consolidate their gains and maintain selective pressure while avoiding escalation that could trigger a broad international confrontation. Containing the setback, by contrast, depends on the government's and its partners' ability to reform command arrangements, improve coordination and rebuild the confidence of both forces and local communities. One of the principal risks is the emergence of arrangements that protect the interests of certain states and vessels while leaving the Yemeni conflict unresolved and entrenching the retreat of public authority along the coast and within its institutions.

Introduction and Methodology

This study examines the impact of the Houthi advance along the western coast and around Bab al-Mandab on the balance of power inside Yemen. It also examines the options available to regional and international actors. The central question is whether the Houthis can turn battlefield gains into lasting political and maritime influence. The study also considers the factors that may limit this process. It focuses on the escalation in September 2026 while drawing on earlier developments needed to explain its context.

The study adopts a descriptive-analytical approach, combining the tracking of field developments with an analysis of actor interests and the construction of conditional scenarios. It draws on testimonies, media reports, information and the references cited in its notes. Accounts attributed to parties to the conflict are assessed within the limits of their sources; explanations of the collapse and assessments of likely future trajectories are analytical judgments subject to revision. Rapid changes in territorial control also require a distinction between physical presence and fire control, and between announcing gains and having the capacity to hold them.

Field Developments and the Emerging Coastal Zone of Control

The wave of fighting examined in this study followed weeks of escalation and became clearly visible from 3 September 2026. On 5 September, government forces launched an offensive from Hays toward Al-Jarrahi, seeking to put pressure on the Houthi line of connection between Hodeida and Taiz, and made substantial gains on that front. The operation unfolded across an interconnected battlespace comprising the coastal plain, the eastern highlands and the roads linking Taiz to the Red Sea; its outcome therefore cannot be understood in isolation from developments on the other fronts.

On the nights of 9 and 10 September, the Houthis launched a multi-directional counteroffensive. They combined pressure from the north with attacks from the highlands east of the coastal plain in the Al-Wazi'iyah and Mawza districts of Taiz Governorate.

According to military sources who took part in the fighting, the Houthis' capture of Khalid bin al-Walid Camp and Jabal al-Nar Camp, which hosts the National Resistance command base, brought Mocha under fire control and pushed government forces to withdraw from southern Hodeida and leave the city. The Houthis entered Mocha and took control of its port on 10 September.¹¹

The fall of Mokha marked the first major turning point. The city is a logistics hub, a port of strategic value, and a forward base for anti-Houthi forces. It also connects the coast with Taiz, Dhubab, and Bab al-Mandab. Its loss deprived government forces of a key position for defense, resupply and northward movement, while giving the Houthis room to reorganize their deployment and link offensive operations with defensive consolidation.

Houthi control subsequently extended south toward Dhubab, bringing the group closer to the Yemeni entrance to Bab al-Mandab. The site's value lies in its potential to improve surveillance, early warning, and pressure on maritime traffic, provided that reconnaissance, command and coordination, and logistics are available. Its fall also narrowed the land space available to anti-Houthi forces and forced them to defend a more sensitive southern line.

Mayyun Island, also known as Perim, adds a different dimension to the territorial gains. Located at the centre of the Bab al-Mandab Strait, it provides any force based there with an advanced position for surveillance, communication, and coercive pressure. Control of the island makes seaward monitoring of the coast more difficult, but does not automatically give the Houthis control over the entire maritime domain.

According to the baseline assumptions used in this study, Houthi control of Greater Hanish, Lesser Hanish and Zuqar islands adds insular depth to this deployment. The islands provide additional points for surveillance, communications, dispersal and concealment, reducing dependence on a single location. Turning them into effective positions, however, remains contingent on securing, supplying and protecting their garrisons.

A connected geographic system thus emerges, linking the city and port, overland corridors and forward islands: Mocha provides the urban and logistical anchor; Dhubab connects the coast to the entrance of the strait; and Mayyun and the other islands extend the maritime deployment area. The value of this interconnected system depends on the Houthis' ability to operate these sites as a single network, not merely on declaring control over them.

These gains do not amount to control of the entire western coast or to the comprehensive closure of Bab al-Mandab. The maritime information on which the study relies does not show that navigation has stopped altogether. Even so, the prospect of targeting or interdiction can raise insurance costs and prompt operators to change routes while vessels continue to transit the strait.

Explaining the Military Collapse and the Limits of Consolidating Gains

The study attributes the speed of the government retreat to the interaction between Houthi offensive preparation and weaknesses in the defensive system. Available information is insufficient to attribute the collapse to a single weapon or decision. Rather, earlier attrition appears to have coincided with deficiencies in command, support and reserves, turning losses that might have been contained into an accelerating retreat. The central hypothesis is that the defending formations fought on the same front without necessarily possessing a unified system for decision-making, information-sharing and resource allocation when pressure intensified.

Testimonies also point to shortages in actual manpower. One media report quoted a Western source as saying that some units had only around one-fifth of their registered strength present because of ghost names on the rolls. [2] By contrast, a National Resistance statement praised air support and the participation of the Giants Brigades, Nation's Shield Forces and tribal fighters, and explained the withdrawal as necessary to avoid encirclement and preserve the force. It also reported more than 500 of its personnel killed and around 1,500 wounded during the period under review; these figures come from the party itself and are not independently verified statistics. The competing accounts differ over the adequacy of resources and support, but they do not justify concluding that support was entirely absent. The assessment therefore focuses on its timing, sufficiency and operational effect.

The factors behind the collapse can be organized into five interconnected levels: offensive initiative, pressure across multiple axes, exposed supply routes, psychological warfare, and a crisis in setting political and military priorities. These categories constitute an analytical interpretation of events, not the findings of a field investigation assigning responsibility to each commander or unit.

Offensive initiative: The Houthis chose the timing and directions of their counteroffensive, while government forces were distributed across a broad front encompassing Hays, Al-Jarrahi, Mocha, Dhubab and the islands, as well as Al-Kadhaha, Maqbanah and Jabal Habashi in western Taiz. If the government's advance toward Al-Jarrahi diverted some reserves and attention, the Houthi attack likely benefited from this dispersion. This remains a plausible explanatory relationship, not evidence that the government offensive alone caused the fall of Mocha.

Multiple pressure axes: The offensive combined threats to corridors and flanks with the exploitation of high ground and psychological and media pressure, forcing defenders to respond simultaneously across dispersed sectors. This requires a shared reserve and a command structure capable of directing it. The government camp, however, comprises formations with different command structures, communications systems, interests and political priorities. Such fragmentation constitutes a structural constraint on unified command and control. [3]

Exposed supply lines and defensive depth: Holding buildings and military positions is insufficient if a force loses the rear roads, high ground and corridors connecting it to its depth. This helps explain the impact of losing Khalid bin al-Walid and Jabal al-Nar camps overlooking Mocha, as well as the importance of Al-Umari Camp in Dhubab district. Pressure around these positions reduced the value of localized fortifications and limited the defenders' ability to operate as a coherent system.

This dynamic also helps explain successive withdrawals without a prolonged battle at every position. When a unit fears that neighboring forces may pull back or that its rear route may be cut, preserving personnel can take priority over holding ground. Some withdrawals may be tactically justified, but without a command capable of transferring them into a new defensive line, they become a chain of local decisions whose effects accumulate. Thus, the survival of some formations does not negate the occurrence of an operational collapse along the coast, just as the setback does not demonstrate the collapse of the government camp across Yemen as a whole.

Psychological warfare: The offensive was accompanied by rapid announcements of advances and messages calling for surrender and amnesty while asserting that government positions could no longer hold. The impact of such messaging is difficult to measure from available data alone, but its coincidence with the fall of a strategic center and the withdrawal of units southward suggests that it affected the morale of forces and communities. Expectations that positions would fall may have accelerated the retreat alongside direct military pressure.

Crisis of priorities: The government camp faced simultaneous choices between retaking Mocha, defending Dhubab and the islands before losing them, preventing the fighting from extending to Lahj and Aden, and maintaining cohesion on the Taiz, Marib and Al-Dhalea fronts. Without a central decision that sets priorities and allocates resources, formations become more inclined to protect their local areas at the expense of a joint plan.

The hypothesis of human intelligence infiltration, or of a particular commander being responsible for betrayal, is not established by the public evidence presented in this study. The Houthis may enjoy advantages in reconnaissance, information-gathering and understanding their opponents' networks, but this does not prove the existence of a specific spy network inside government forces. Analysis should distinguish between assessing intelligence performance and leveling accusations against individuals, so that explaining defeat does not become a vehicle for settling scores that deepens fragmentation.

On the other side, consolidating these gains imposes burdens on the Houthis that go beyond the requirements of a rapid breakthrough. They must administer Mocha, secure the Mocha-Dhubab axis and lines of communication, supply forces deployed along the coast and on the islands, and prepare for air and naval strikes. Island control could become a liability if the cost of protecting and sustaining these positions exceeds their operational and political value.

Government forces still have opportunities to contain the situation. This will depend on rebuilding command structures, coordinating withdrawing units, and preventing further deterioration. Regaining the initiative should be measured by the ability to protect civilians and roads and hold recovered positions. It should not be measured by the number of strikes or the temporary capture of a location. The success of any counteroffensive will therefore depend on a sustainable plan for what follows the initial advance.

Shifts in the Balance of Power inside Yemen

The loss of Mokha weakens the position of Presidential Leadership Council member Tareq Saleh and the National Resistance he leads within the anti-Houthi camp. The political influence of these forces depends partly on their territorial presence, their ability to provide security and services, and their capacity to attract support.

The setback could reduce their influence within the Presidential Leadership Council and affect their relations with external supporters. It does not, however, mean the disappearance of their forces or networks. Their future role will depend on whether they are reintegrated into a broader national defence framework or whether their retreat creates an opportunity for others to challenge their influence and settle political differences with them.

The Presidential Leadership Council also faces a test of its ability to translate political consensus into institutions for joint action. The differing social bases, political projects and local priorities of its components may push them, after the setback, to fortify their own areas and retain their resources. In that case, the collapse would reproduce the fragmentation that helped produce it. Containing this dynamic requires a clear allocation of responsibilities and mutual guarantees regarding command, resources and authority.

The development also puts the concept of 'integrated deterrence' adopted by the government leadership to a practical test. Combining military, financial and political tools requires defining the function of each and its relationship to the objective. Economic restrictions that are not accompanied by effective control of entry points and improvements in revenues and services may shift part of the cost onto communities in government-held areas while adversary networks adapt. Likewise, adding more forces does not increase effectiveness if command disputes remain unresolved. The test of deterrence becomes the ability to implement specific, sustained decisions and convince the adversary that they can be maintained.

The involvement of Tihama forces and local communities will be directly important in any subsequent arrangements. Retaking cities without rebuilding trust may produce fragile military control. In this context, the decision to form the Tihama Resistance and appoint Zaid Mansar, reported by 2 December Agency on 13 September 2026 is significant [4]. Its organizational separation from the National Resistance could create space to address grievances over marginalization if accompanied by genuine representation and coordination that avoids creating another layer of division.

In Taiz, the coastal retreat increases pressure on links with Mocha and movement through the western countryside, but it does not make the fall of the city inevitable. Its fronts retain distinct military, terrain and local organizational characteristics. The degree of impact will depend on the security of access routes, the cohesion of sectors and their ability to absorb the shift in pressure.

In Lahj, Al-Dhalea and Aden, the political impact may precede any military shift. The proximity of the fighting increases the sensitivity of command, recruitment and force-deployment arrangements and may encourage either cooperation or competition over who represents the defense of the south. Containing the risk therefore depends on accommodating the interests and concerns of local forces and clarifying the relationship between military participation and post-battle power arrangements.

Marib and Al-Jawf may be affected by the redistribution of resources and attention even before the coastal offensive reaches them directly. The Houthis can apply pressure there to disperse their opponents, while the government may see the activation of other fronts as a means of hindering the consolidation of Houthi gains. The value of widening the confrontation, however, remains dependent on resources, coordination, sustainability and the impact on civilians, particularly for a leadership already struggling to manage multiple fronts.

On the Houthi side, the advance provides a political resource for mobilization and for reinforcing the group's cohesion after the costs of losses, economic pressure and recruitment. According to available information, the price of a gallon of gasoline rose by 1,000 Yemeni Rials, roughly two dollars, in Houthi-controlled areas within days of the advance. The sequence alone does not prove a causal relationship, but it places the military gain alongside continuing economic burdens on the population. The current gains are likely to give Houthis leaders greater room for maneuver temporarily, without resolving salary and service crises or guaranteeing acceptance of its authority by newly controlled communities.

Coastal society cannot be treated as a single bloc whose loyalties automatically shift with changes in territorial control. Residents may remain silent or adapt in order to protect their security and livelihoods without endorsing the new authority. Arrests, levies, recruitment and the handling of property all affect the cost of consolidating control. Conversely, the treatment of displaced people and the government's ability to care for them will test whether communities that have lost government control over their areas retain confidence in the state.

Maritime, Regional and International Implications

Assessing the maritime gain requires a clear distinction between three factors: control of territory, the ability to disrupt use of the maritime domain, and the capacity to regulate and protect navigation over the long term. The Houthi advance strengthens the first level and expands some tools available at the second, while the third requires broader capabilities and commitments. The more precise description, therefore, is an expansion of the Houthis' capacity for maritime coercion, while the conversion of that capacity into sustained control remains untested.

The Houthis possessed tools for disrupting navigation before this expansion, including missiles, drones, armed and unmanned boats, and mines. The new locations add options for deployment and surveillance, but also increase requirements for intelligence, communications, maintenance, munitions and logistics. The group is therefore likely to favor selective disruption, similar to the ban it announced on Saudi vessels, in order to maintain pressure while reducing the likelihood of a broad response. Even so, the economic and political effects cannot be confined to vessels the group explicitly says it will target.

The timing becomes especially significant in the oil and petroleum-liquids flow data cited by the study from the U.S. Energy Information Administration. Transit through Bab al-Mandab rose from 5.6 million barrels per day in the first quarter of 2026 to 8.1 million in the second quarter, while flows through Hormuz fell from 14.9 to 4.9 million barrels per day. These are quarterly averages published in the August data and do not measure navigation after the fall of Mocha. [5] Within their time frame, however, they illustrate the Red Sea's growing importance in the distribution of energy flows before the latest battlefield development.

For Saudi Arabia, simultaneous disruption in Hormuz and the Red Sea makes export security more sensitive. Moving oil to the western coast can reduce dependence on the eastern outlet, but pressure on pipelines or on shipping from Red Sea ports limits that flexibility. On 14 September, the Associated Press quoted regional officials as saying that repairing damage to the East-West Pipeline could take weeks. [6] Information about the attack indicates that it originated from the direction of Iraq and points to Houthi missile and drone systems there as well as ties with Iran-backed armed groups. The simultaneity of these pressures does not prove the existence of a unified operational command, but it highlights the possibility that alternative export routes face overlapping risks.

The direction of shipping remains a decisive factor: not all exports from Yanbu have to pass through Bab al-Mandab. Cargoes heading north toward the Suez Canal and the Mediterranean differ from those moving south toward Asian markets. The threat at the southern entrance therefore raises the cost of some routes and reduces export flexibility without closing all Saudi oil outlets.

This equation pushes Riyadh to treat Yemen's coast as part of its direct economic security. The response, however, depends on the objective: reducing attacks, protecting exports, restoring government control, or altering the balance of the war. These objectives can overlap, but they require different levels of resources and political and military commitment.

In this context, Saudi Arabia has also held consultations on activating the Mecca Joint Defence Agreement with Türkiye and Pakistan. Based on Article 51 of the UN Charter, the agreement states that an armed attack on any of the three countries is considered an attack on all three and provides for expanded defence cooperation.

Its practical effect, however, depends on the nature of the attack and how the parties assess the appropriate response. On 10 September, Pakistan's Foreign Ministry was reported as saying that there were no discussions at that time about a military response under the agreement, while reaffirming commitment to it if needed. This position points to the priority of deterrence and consultation at that stage: defending Saudi territory and infrastructure does not necessarily entail automatic participation in a ground war inside Yemen.

For Iran, the advance of its ally creates additional room for regional pressure. Reports say Tehran asked the Houthis to carry out attacks on Saudi Arabia, promised additional funding and weapons, and sent Islamic Revolutionary Guard Corps commanders to take part in directing coastal operations and attacks on Saudi Arabia. [7] To the extent that the underlying evidence supports this account, it points to a connection between the Yemeni battlefield and Iranian pressure on Saudi Arabia.

At the same time, the Houthis have interests tied to their authority, rivals and financing inside Yemen. The gains may provide them with greater negotiating latitude in their relationship with Tehran, while regional settlements that affect their domestic position remain a potential source of concern. On the Emirati side, one narrative blames Saudi management of the battle for the loss of gains that Abu Dhabi had previously helped secure, while other reports allege an indirect UAE role in the Houthi takeover of Bab al-Mandab. [8] This interpretation reflects a dispute over responsibility for the collapse, but by itself is insufficient to establish its causes or attribute them to the UAE's official position.

Egypt is directly implicated because transit through Bab al-Mandab is linked to the Suez Canal and to the northbound routes of Red Sea exports. Its interests may combine protecting transit with avoiding a confrontation that widens the disruption. Agreement among regional states on the strait's importance is therefore not enough to produce a common response; this requires convergence in threat assessments, burden-sharing and clarity over responsibilities and objectives.

The interests of the Horn of Africa states and the western shore of the Red Sea vary according to geography, capabilities and relationships. Djibouti directly faces pressures from displacement, rescue operations and reception, while Eritrea, Somalia and Sudan are affected to different degrees by risks to trade and navigation. A 13 September update attributed to the International Organization for Migration reported 82,164 people displaced since the beginning of the month and more than 2,000 arriving in Djibouti. [9] This adds a cross-border humanitarian dimension and underscores the need to treat western-shore states as partners with priorities of their own. The disruption may encourage broader cooperation or new arrangements for ports and security presence, further internationalizing the coast and risking the marginalization of local communities' needs.

The United States and other maritime powers seek to balance protection of navigation with avoiding entanglement in a wider confrontation. U.S. Vice President JD Vance was quoted as saying that the White House was in direct contact with the Houthis. [10] Donald Trump was also quoted as saying that the Houthis had asked not to enter into a war with them. These channels may help manage friction, but they do not determine the response if targeting widens to vessels or forces from several countries. Decisions would still depend on resources, commitments, the assessed cost of escalation and the limits of U.S. willingness to cooperate with Saudi Arabia.

Differences among the priorities of external powers also give the Houthis an opportunity to separate tracks, reducing friction with one party while sustaining pressure on another. This creates a risk that special transit arrangements could be accepted to address the security of certain vessels, potentially including payments for passage. Such arrangements could protect selected shipping activity without contributing to the restoration of Yemeni government authority. If such arrangements emerge, transit security may improve partially while the group's ability to use threats to obtain resources and concessions expands.

~~Treating the Houthis as a local guarantor of passage could temporarily reduce risk,~~

but it would also increase the value of threat as a means of obtaining recognition and concessions. The study interprets the group's ban on Saudi vessels, announced on 20 July, within this pattern of pressure, aimed at pushing Riyadh toward compensation and concessions related to the group's status and authority in the areas it controls.

On Russia's position, the Kremlin spokesperson was reported as saying that Moscow was monitoring Yemen's rapidly evolving developments and referring to the 'legitimacy of the party that governs Yemen.'^[11] This may be read as openness to reassessing the position toward the internationally recognized government, but it does not amount to a decision to withdraw recognition. Its significance lies in the possibility that battlefield gains could spill over into the diplomatic environment of the conflict. If this were to develop into an official change in Russia's position, it would give the Houthis a gain extending beyond territorial control.

Response Options and Paths of War and Settlement

The government's and its partners' options begin with halting the deterioration and preventing further loss of strategic depth, then restoring the capacity for joint action and defining the scope of what can realistically be recovered. This requires clarifying the relationship between political and military leadership and the responsibility of each formation, while tying support to actual force strength and capabilities. Declaring expansive objectives before building the means to implement them may consume resources and deepen the loss of confidence.

A counteroffensive remains an option if coherent leadership and sustained support are available, but its success should be measured by holding positions, protecting civilians and restoring movement and services. Reducing Houthi military supply also requires cooperation in monitoring and enforcing existing restrictions while protecting trade and humanitarian relief; imposing broad costs on civilians may give the group additional resources for mobilization.

The vulnerability of the coast does not make its recovery easy. Air or naval superiority can increase the cost of maintaining an armed presence, but it cannot establish stable authority on the ground without capable and locally accepted partners.

Nor would retaking Mayyun alone eliminate the threat to navigation, which existed

before the island was captured. Success should therefore be measured through several outcomes: reducing coercive capabilities, stabilizing institutions, protecting civilians, and changing the map of territorial control. Houthi victory may also encourage a harder negotiating position, which the group may present as proof of the effectiveness of combining attacks on Saudi Arabia, maritime pressure and territorial advances. The Houthis are likely to seek to translate their gains into concessions related to ports, the airport, salaries, revenues and political recognition under the heading of 'peace entitlements,' together with guarantees limiting the prospect of future attacks on areas under their control.

Conversely, it would be difficult for Saudi Arabia and the government to accept an arrangement that entrenches the loss of Mocha and a Houthi presence in Dhubab and Mayyun without compensation, given the implications for deterrence and maritime security. Serious negotiations may therefore be preceded or accompanied by attempts to alter the battlefield situation by retaking positions, preventing consolidation or blocking further expansion.

Future Scenarios

The following scenarios address the near term after the developments examined by this study. They are not mutually exclusive: a counteroffensive, broader regional support and political negotiations could unfold simultaneously.

Scenario One: Containing the Advance and Establishing New Lines of Contact

This scenario assumes that government forces succeed in halting withdrawals and protecting their strategic depth while the Houthis focus on administering and consolidating their gains. Airstrikes, clashes and maritime pressure would continue without major geographic change. Indicators would include a slowdown in territorial shifts, more regular reinforcement flows and greater stability in civilian movement. The study considers this a plausible near-term scenario, conditionally, because it reflects both the Houthis' need to consolidate their gains and their opponents' need to reorganize. It would, however, temporarily entrench the setback and open competition over the terms of the next round.

Scenario Two: A Government Counteroffensive

This scenario requires coherent command, agreement among partners and sufficient resources to sustain operations beyond the initial advance. Indicators would include the return of withdrawn units to organized missions, integration among formations and the recovery of positions followed by a continuous presence. A high volume of airstrikes and statements alone would not demonstrate that these conditions have been met. The scenario becomes less likely if operations are rushed to compensate psychologically for the setback, if commanders compete to claim credit, or if reserves are consumed before gains are secured; a failed attempt could reinforce rather than reduce Houthi superiority.

Scenario Three: Further Houthi Expansion

This scenario depends on continued weakness in government coordination and on the Houthis' ability to combine consolidation of existing gains with offensives on other axes. Indicators would include pressure shifting to new fronts or expanded control along disputed coastal areas. As for Mayyun, which this study treats as being under Houthi control, the key test is whether the group can consolidate its presence and convert it into sustainable capability. Prospects for expansion would diminish if supply falters and the burdens of administering territory and islands increase.

Scenario Four: Broader Saudi and Regional Involvement

This becomes more likely if attacks on Saudi Arabia continue, damage to its exports and ports increases, or government strategic depth suffers additional losses. It could begin with expanded support, coordination and maritime protection before developing into greater combat involvement. The relevant indicators would be verifiable arrangements concerning forces, funding and mandates, not visits and statements alone. Political, military and economic costs constrain this path, particularly if there is no clear agreement on the purpose and limits of intervention. It could support containment or a counteroffensive rather than constituting a wholly separate alternative.

Scenario Five: A Political Bargain that Absorbs the New Battlefield Reality

Under this scenario, the Houthis seek to convert their advance into security and economic concessions and recognition of their role, while the government and its partners seek to prevent the setback from being entrenched without compensation. Limited arrangements become more likely if neither side can secure a decisive outcome, the costs of navigation and displacement increase, and negotiating channels and implementation guarantees are available. Such bargaining could coexist with continued fighting; sector-specific maritime de-escalation would not necessarily amount to a comprehensive Yemeni settlement.

Continued communication provides a basis for this path without proving that an agree-

ment is close. In his 15 September briefing, UN Special Envoy Hans Grundberg called for keeping channels of communication open and referred to the Military Coordination Committee as a platform for addressing incidents and humanitarian issues. The importance of these channels lies in reducing the risks of miscalculation and protecting civilian movement. A sustainable agreement, however, would require addressing representation, authority, resources and security beyond merely fixing lines of contact.

Conclusion

Determinants of Stability and the Sustainability of Arrangements

Durable arrangements need to link the safety of navigation with protection of local communities and coastal institutions. An understanding that secures selected vessels while leaving fighting and displacement unresolved addresses only a partial interest while preserving the drivers of escalation. Sustainability requires protection of civilian ports and humanitarian workers, guaranteed access for goods, clear monitoring mechanisms and a political process in which affected forces and communities are represented. Oversight of smuggling and financing should also not be turned into broad restrictions that increase local dependence on armed intermediaries.

The strategic weight of the gains will be determined by the extent to which they affect the decisions of other actors. If the Houthis hold the positions and impose new negotiating terms, they will have converted territory into influence. If administration falters, supply costs rise and the opposing front becomes more cohesive, the value of control may decline even if it formally continues. Monitoring the shift therefore requires measuring its political, economic and administrative outcomes alongside the map of military deployment.

Accordingly, the war's next direction will depend on the interaction between the Houthis' ability to consolidate their coastal presence, the government's and its partners' ability to reorganize, and the nature of regional and international responses to the maritime threat. Any assessment remains open to revision as new indicators emerge: the regularity of government command, the sustainability of Houthi supply, patterns in the targeting of vessels and the substance of political understandings. The latest gains have expanded the group's influence and weakened its opponents, but they have also imposed the burdens of holding territory, populations and infrastructure in an environment of growing scrutiny and external pressure.

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