

STRATEGIC ANALYSIS

The Iran–U.S.–Israel War Enters a New Dimension

Houthi Support, Proxy Pressure, and the Battle for Two Maritime Chokepoints

The Houthi entry into the conflict connects pressure at Hormuz with pressure in the Red Sea, creating a two-chokepoint challenge without requiring a single, unified command structure.

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Executive Assessment

- The conflict has acquired a second active maritime front. The Houthi declaration of a blockade against Saudi Arabia was followed by a confirmed strike on at least one Saudi tanker, moving the threat from signaling to attempted enforcement.
- Iranian support for the Houthis is established, but direct Iranian control over every Houthi decision is not. The best-supported formulation is “Iran-aligned armed partner with operational autonomy.”
- Reuters reporting on a July transfer of IRGC personnel and missile- and drone-related equipment—denied by the Houthis—raises the possibility of closer wartime coordination and should be treated as a significant but not yet independently confirmed development.
- Simultaneous pressure at Hormuz and Bab el-Mandeb creates a compounded risk to energy exports, commercial shipping, Saudi bypass routes, and U.S. defensive resources.

Background

The war began on February 28, 2026, with joint U.S.-Israeli strikes against Iran’s nuclear and military infrastructure, but it has since moved well beyond its original battlefield. Those attacks killed Supreme Leader Ali Khamenei and set off months of missile strikes, drone attacks, maritime disruption, and intermittent diplomacy (Encyclopaedia Britannica, 2026). For a brief period, the conflict appeared to slow. An April 8 ceasefire reduced the tempo, and a June 17 memorandum of understanding opened a narrow diplomatic channel: Iran agreed to allow commercial passage through the Strait of Hormuz for 60 days while negotiations addressed the strait, Iran’s nuclear and missile programs, and possible sanctions relief (House of Commons Library, 2026).

That opening did not last. By mid-July, U.S. strikes on Iranian infrastructure had resumed, Iran was again disrupting shipping through Hormuz, and Tehran was warning that its response could spread to new areas (Al Jazeera, 2026a). The conflict returned to its central contradiction: Washington and Tehran still saw value in negotiation, but each side also believed that more pressure could improve its bargaining position.

The latest Houthi intervention gives that pressure campaign a wider geography and a sharper strategic edge. It connects the Persian Gulf to the Red Sea, exposes Saudi Arabia more directly, and places two of the world’s most important maritime corridors under simultaneous threat. The war is no longer defined only by what the United States, Israel, and Iran do to one another. Increasingly, it is shaped by what Iran-aligned armed groups can do on their own, in coordination with Tehran, or simply in ways that serve the same broader purpose.

The Core Sticking Points

Iran's Internal Fault Lines

Iran's external strategy is also being shaped by a wartime succession struggle. After Ali Khamenei's death, the Assembly of Experts selected his son, Mojtaba Khamenei, as Supreme Leader. Senior Islamic Revolutionary Guard Corps (IRGC) commanders, Basij leaders, and hardline political networks backed the appointment. Reformists and moderates, by contrast, saw it less as a transition than as continuity under a different name (Foreign Affairs, 2026).

Mojtaba's rise did not produce a unified regime. Competing networks remain active inside the security establishment, parliament, and the clerical system. The most consequential divide may no longer be the familiar one between reformists and hardliners. It may instead run between pragmatic security figures willing to accept a limited agreement and ideological hardliners who view compromise on enrichment or Hormuz as unacceptable. The Supreme National Security Council's support for the June arrangement suggested that pragmatic elements of the security establishment still had influence, even as civilian moderates were increasingly marginalized (Al Jazeera, 2026b; Carnegie Endowment for International Peace, 2026).

That internal tension matters for the Houthi question. If Tehran sees proxy pressure as a way to improve its negotiating position without accepting all the risks of direct confrontation, then it has an incentive to strengthen partners that can impose costs at a distance. But Iran cannot assume that every partner will act with perfect discipline, or remain within Tehran's preferred limits.

The Houthi Front: From Threat to Active Second Front

On July 20, Yemen's Houthi movement, formally known as Ansar Allah, announced a maritime blockade against Saudi Arabia. The declaration came after a renewed exchange of attacks between the Houthis and Saudi Arabia and threatened shipping connected to Saudi ports. It mattered even before a weapon was fired. Five tankers reportedly altered course, showing how a credible threat can change commercial behavior through higher insurance costs, longer routes, and risk-avoidance decisions (Reuters, 2026a; Foundation for Defense of Democracies, 2026).

Two days later, the situation escalated. The Houthis claimed attacks on the Saudi tankers Encelia and Layla using missiles and drones. Saudi authorities confirmed that the Encelia was struck and caught fire near Jizan; its crew was reported safe. The second claimed attack had not been independently confirmed when Reuters reported the incident (Reuters, 2026b). That distinction is important. The blockade had moved from rhetoric to attempted enforcement, but not every Houthi claim had been verified.

Operationally, the significance is considerable. The Houthis do not need to physically occupy the Bab el-Mandeb Strait to disrupt it. Their earlier Red Sea campaign showed that anti-ship missiles, ballistic missiles, one-way attack drones, uncrewed surface vessels, mines, and small-boat tactics can impose disproportionate costs on commercial

shipping and naval forces. U.S. Naval Institute analysis counted hundreds of Houthi attacks on commercial and military targets and emphasized how relatively inexpensive systems can create an effective sea-denial problem without conventional naval control (U.S. Naval Institute, 2026).

Geography magnifies that capability. Bab el-Mandeb connects the Gulf of Aden and the Arabian Sea to the Red Sea, the Suez Canal, and the Mediterranean. Around 12 percent of global trade normally passes through the corridor, including roughly one quarter of container traffic, according to Associated Press reporting. The strait is not a perfect mirror of Hormuz. Ships in the Red Sea can still move north through Suez, and vessels can reroute around the Cape of Good Hope. Even so, disruption adds time, fuel expense, insurance premiums, and pressure across global supply chains (Associated Press, 2026).

Proxy, Partner, or Co-Belligerent?

It is tempting to call the Houthis simply an Iranian proxy, but that label can obscure more than it explains. Iran has provided weapons, training, technical assistance, and political support. The IRGC and Lebanese Hezbollah have also helped develop Houthi command structures and long-range strike capabilities. U.S. and international assessments therefore have strong grounds for describing the movement as Iran-backed or Iran-aligned (National Counterterrorism Center, 2026; Knights, 2022).

Control is a separate matter. Brookings scholar Nabeel Khoury argues that the Houthis have their own domestic agenda, leadership, ideology, and decision-making structure and therefore do not meet the strictest definition of a proxy acting under Iranian direction (Khoury, 2024). Legal and academic research reaches a similarly cautious conclusion: material support and strategic alignment do not automatically establish that every Houthi operation is attributable to Iran (Maddocks, 2025). The most accurate description remains an Iran-aligned armed partner with meaningful operational autonomy.

New reporting, however, suggests that the relationship may be deepening during the current war. On July 23, Reuters reported that Iran had flown IRGC commanders, military advisers, and missile- and drone-related equipment into Yemen on a July 13 flight. The report cited four sources, including two Iranian sources, Yemen's information minister, and a regional security analyst. A Houthi official rejected the allegation as false (Reuters, 2026c). The claim should therefore be treated as credible multi-source reporting, not as a formally confirmed fact.

If accurate, the transfer matters in three ways. First, it suggests that Tehran was strengthening Houthi capabilities before the July 20 blockade announcement. Second, IRGC personnel on the ground could improve targeting, weapons integration, operational security, and battle-damage assessment. Third, the timing raises the possibility of closer coordination between pressure at Hormuz and pressure in the Red Sea. It does not, by itself, prove that Iran ordered the tanker attacks. It does make the idea of two entirely separate campaigns less persuasive.

Two Chokepoints, One Strategic Effect

Iran and the Houthis do not need identical command arrangements to produce a combined strategic effect. Pressure at Hormuz constrains Gulf exports. Pressure at Bab el-

Mandeb threatens the Red Sea outlet that Saudi Arabia increasingly relies on to bypass Hormuz through its East-West pipeline and Yanbu export facilities. The U.S. Energy Information Administration estimates that Saudi Arabia's pipeline can move five million barrels per day under normal capacity, with past temporary expansion to seven million. That alternative looks less reassuring when the Red Sea route itself is under attack (U.S. Energy Information Administration, 2025a).

The result is distributed maritime coercion. Iran can threaten the Gulf directly, while the Houthis create risk farther west with a smaller and less conventional force. Even incomplete blockades can have real effects because shipping companies respond to probability, not certainty. During the earlier Red Sea crisis, oil flows through Bab el-Mandeb fell by more than half, while traffic around the Cape of Good Hope increased sharply (U.S. Energy Information Administration, 2024).

For Tehran, this creates leverage without requiring its navy to control both waterways. For the Houthis, it offers regional relevance, a renewed justification for military action, and another way to pressure Saudi Arabia. For Saudi Arabia, the vulnerability runs in two directions: exports through Hormuz face Iranian disruption, while exports shifted to the Red Sea face Houthi attack. For the United States and Israel, the challenge becomes harder because military pressure on Iran can now generate responses across a wider network of actors and locations.

Strategic and Operational Implications

- First, deterrence becomes more complicated. A strike intended to punish Iran may trigger a response by an aligned group whose calculus is partly local and partly regional. The reverse is also true: striking the Houthis may not compel Tehran to change course, especially if Iran values the movement precisely because it can absorb pressure while preserving Iranian deniability.
- Second, the conflict disperses resources. Protecting Hormuz, the Gulf, the Red Sea, and Israel at the same time requires air and missile defense, naval escorts, intelligence coverage, logistics, and expensive interceptors across a vast area. The cost exchange often favors the attacker. Relatively inexpensive drones or missiles can force the defender to use far more costly systems and maintain a persistent presence.
- Third, Saudi Arabia faces renewed escalation risk. The Houthi-Saudi truce had reduced cross-border violence for years, even without producing a comprehensive peace. Renewed attacks on airports, oil infrastructure, or tankers could pull Riyadh back into a war it had been trying to leave. That would widen the conflict politically and geographically and could undermine Oman-led efforts to stabilize Yemen.
- Fourth, the conflict creates a legal and diplomatic problem. The United Nations Security Council has repeatedly demanded an end to Houthi attacks on merchant and commercial vessels and, on July 14, extended reporting on Red Sea attacks through January 2027 (United Nations Security Council, 2026). Enforcement, however, remains difficult. International actors must protect navigation while avoiding steps that further fragment Yemen or turn a maritime-security mission into another open-ended regional war.

Scenarios Ahead

- **Managed de-escalation.** Washington and Tehran could revive the June process, restore more regular traffic through Hormuz, and include Red Sea security in a broader arrangement. This would be the fastest way to reduce immediate maritime risk. Its weakness is that any agreement that treats the Houthis only as an Iranian bargaining chip may prove fragile if Houthi leaders retain independent motives for continuing pressure on Saudi Arabia or Israel.
- **Continued distributed attrition.** This is the most plausible near-term scenario. U.S. and Israeli strikes, Iranian retaliation, Houthi maritime attacks, cyber operations, and diplomatic mediation could continue at the same time. No actor would achieve decisive victory, but commercial costs and the risk of casualties would keep rising. Shipping may remain technically possible while becoming slower, more expensive, and more heavily militarized.
- **A wider regional war.** A successful strike on a major Saudi energy facility, a mass-casualty attack on a commercial vessel, or U.S. casualties from a Houthi operation could trigger a much larger response. Saudi reentry into direct conflict with the Houthis would open another active theater. The risk would be especially acute if decision-makers concluded—correctly or incorrectly—that Tehran had ordered the attack.
- **Fragmented diplomacy.** Iran may reach a limited arrangement with Washington while the Houthi-Saudi conflict continues on a separate track. That could reduce pressure at Hormuz without securing Bab el-Mandeb. It is a reminder that a regional network is not a single organization: diplomacy with the patron does not automatically settle the conflicts of every partner.

Outlook

The Houthi intervention changes the war by turning Iran's regional relationships into a more immediate form of maritime leverage. Two strategic corridors are now connected by conflict, even if they are not controlled through a single command chain. That connection increases pressure on Saudi Arabia, stretches U.S. and allied defensive resources, and exposes global trade to decisions made by actors operating far beyond the original theater.

The evidence points to a careful conclusion. The Houthis are not merely an Iranian instrument, and their actions should not automatically be attributed to Tehran. But they are not an unrelated Yemeni actor whose campaign only happens to coincide with Iran's interests, either. Iranian material support is well established, strategic objectives overlap, and the reported July transfer of IRGC personnel and missile-related equipment suggests the relationship may be moving toward closer wartime coordination.

The most realistic outcome is still an unstable cycle of escalation and negotiation. Military action can destroy infrastructure and reduce capabilities, but it cannot, by itself, resolve Iran's internal struggle, Yemen's unresolved war, or the political grievances that

sustain the region's armed networks. Any durable settlement will need more than a U.S.-Iran agreement. It will require a maritime-security framework for both chokepoints, a credible Houthi-Saudi de-escalation process, and clear mechanisms for preventing aligned actors from turning local disputes into triggers for a wider war.

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