

# **Leaked Texts and Limited Strategy:** The US Strikes in Yemen

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**Cover photo:** A US naval aircraft takes off from the USS Harry S Truman to conduct strikes against Houthi targets in Yemen // Photo credit: US Central Command X account.



Kingdom of the Netherlands

The Sana'a Center for Strategic Studies is an independent think-tank that seeks to foster change through knowledge production with a focus on Yemen and the surrounding region. The Center's publications and programs, offered in both Arabic and English, cover political, social, economic and security related developments, aiming to impact policy locally, regionally, and internationally.

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*"This [is] not about the Houthis."*

*US Secretary of Defense Pete Hegseth, March 2025.<sup>[i]</sup>*

Recently **leaked** US attack plans, shared inadvertently with *Atlantic* editor-in-chief Jeffrey Goldberg, were startling not just in their disclosure but in what they disclosed – that the Trump administration may have no intermediate or long-term plan for how to deal with the Houthis. Rather, the airstrikes appear intended simply to reassert American power, with little concern for their potential to escalate Yemen's civil war, the security risks this would produce, or the humanitarian toll it would exact.

The American strategy risks failing on its own terms. Houthi attacks in the Red Sea are less an act of solidarity with the Palestinians than an exercise in propaganda, to which confrontation with the US only lends further weight. Yemen is **starved** for both food and peace, but a chain of bloody political machinations has confounded efforts to end its civil war. When the Israeli bombardment of Gaza was finally **suspended** on January 19 and Donald Trump **acceded** to office the next day, there was optimism that the diplomatic process might finally be restarted. But the renewal of **US** airstrikes in Yemen and **Israeli** attacks against Gaza has undone such hopes. The war in Yemen now appears set to resume in earnest. US airstrikes and aid cuts are likely to generate a series of unintended consequences, including the substantial risks of a broader conflagration and a humanitarian catastrophe, and there is little evidence the US has given sufficient consideration to either.

## October 7 Upends Peace Efforts

The myopia of the Trump administration's stated policy is apparent to anyone familiar with the complexities of Yemen's civil war. The frontlines have remained relatively static since early 2022, when UAE-backed forces **broke** a costly Houthi offensive on strategic oil fields. A UN-sponsored **truce** followed in April, and despite its acrimonious **expiration** that fall, major ground operations have not resumed. By September 2023, a Saudi **plan** for withdrawal from the conflict, negotiated with the Houthis without input from the internationally recognized government, had been endorsed by the UN special envoy's office. Riyadh sought a swift exit, deferring thornier questions and final status negotiations to a future intra-Yemeni process.

But Hamas' **incursion** into southern Israel on October 7, and widespread horror at Israel's rapid destruction of Gaza, provided the Houthis with an opportunity to both quell domestic opposition and maximize their political leverage. In purported solidarity with Gaza, the group **seized** the cargo ship *Galaxy Leader* in November 2023, and began missile and drone **attacks** against commercial ships transiting in the Red Sea. The prospect of a deal with the group became anathema to the US, and bilateral talks between the Houthis and Saudi Arabia were put on indefinite hold.

<sup>[i]</sup> Communication cited in: Jeffrey Goldberg and Shane Harris, "Here Are the Attack Plans That Trump's Advisers Shared on Signal," *The Atlantic*, March 26, 2024, <https://www.theatlantic.com/politics/archive/2025/03/signal-group-chat-attack-plans-hegseth-goldberg/682176/>

The Houthis quickly benefited from a wave of public support for their stance. Weekly marches in support of Palestine drew **tens of thousands** of demonstrators in Sana'a and other cities. Saudi Arabia had reportedly been interested in **normalization** with Israel, but with **the world watching the destruction** of Gaza, it could hardly pursue those talks either.<sup>[2]</sup> The kingdom's public **condemnation** of Israeli bombing now appeared timid next to the Houthi naval campaign. And without a stronger **defense commitment** from the US, Riyadh could not push the Houthis to abandon their military adventurism and return to the negotiating table in Yemen. When the Yemeni government tried to cut the Houthis off from the international financial system, it provoked **threats** of military retaliation against Saudi targets - a dressing down by the Saudi ambassador resulted in a rushed and embarrassing climbdown.

The Saudis were not alone in their inability to condition Houthi behavior. In response to the Red Sea attacks, the US and UK began **airstrikes** in Yemen on January 12, 2024, targeting missile launch sites and shooting down drones and projectiles. A small European Union naval squadron later **conducted** its own patrols in the area. The US Navy said the operation was its most intense since the **Second World War**, and it reportedly **cost** more than US\$4 billion through September 2024. But the limited operations were defensive and reactive, and avoided targeting the group's leadership or frontline positions. They were also largely ineffective. Houthi attacks on shipping continued, and the group soon began targeting Israel **proper**. On July 19, a Houthi drone **flew** some 1,200 miles, traversing Egypt and the Mediterranean before **striking** Tel Aviv. The Israeli military retaliated with airstrikes of its own, targeting dual-use infrastructure such as ports, fuel depots, and power plants in Sana'a and Hudaydah. But the Houthis remained undeterred. Their domestic weapons industry was now well established, supplemented by smuggled materiel from Iran. By January 2025, the Houthis had **attacked** over a hundred vessels since the start of the conflict in Gaza.

## The Gaza Ceasefire and Renewed Escalation

Despite their limited impact on Israeli behavior, the Houthis insisted that their drone and missile strikes would continue until a ceasefire agreement in Gaza was reached. This, in turn, depended on Israeli Prime Minister Benjamin Netanyahu, who correctly construed that the Biden administration would do **nothing** to constrain Israel's military action, particularly in an election year. Netanyahu likely also believed he might find an even more sympathetic partner should Trump win. It was a shrewd bet. Talks began in earnest in January, and a ceasefire was announced on January 19. Trump was sworn in the next day.<sup>[3]</sup>

The Houthis subsequently halted their attacks, and it appeared for a while that the gambit had succeeded. The campaign had allowed them to showcase the scope and range of their arsenal and the resilience of their military capabilities, which

<sup>[2]</sup> Hamas may well have been **hoping** to disrupt the talks when it launched its attacks.

<sup>[3]</sup> Netanyahu may have wanted both to allow Trump to take **credit** for the ceasefire, but at the same time to present it as a done deal, that he might not unduly **interfere**. Hostilities could, and were, resumed once the extent of Trump's **positions** became clearer.



had emerged relatively unscathed, and the West's appetite for retaliation and intervention in Yemen was shown to be limited. Domestically, the Houthis bought time to further consolidate control over society – an arrest campaign targeted activists, humanitarians, and embassy workers. Some were **accused** of being Israeli and American spies, their forced **confessions** broadcast on public television. The struggling and divided internationally recognized government posed little threat, and flush with new **recruits**, the Houthis reinforced their frontlines and moved to expand control over state institutions and **trade**.

The ceasefire was ultimately short-lived. Disputes over hostage swaps gave the Israelis a pretext to **close off** humanitarian aid to Gaza, and the Houthis promptly **threatened** to resume targeting Israeli ships until access was restored. But the political environment was now entirely different. The Trump administration had made clear its intent to pursue a policy of “**maximum pressure**” on Iran, which had been weakened in its confrontation with Israel. Its deterrent threat had been based largely on its regional partners, the so-called “**Axis of Resistance**.” Hamas in Gaza and Hezbollah in Lebanon had seen their capabilities shattered and exposed, and Syria's Assad regime had fallen to rebel forces in December 2024. After **withdrawing** the US from the Joint Comprehensive Plan of Action (JCPOA) nuclear deal in 2018, Trump now expressed an interest in compelling the Iranians to sign a new one. The destruction of its allies **arguably** made a bomb more important to Tehran - it had relied on the Axis as insurance against US-Israeli action. Certainly, it increased its salience as a locus for **negotiation**. In public **remarks**, Trump was characteristically threatening, saying he hoped for a deal while warning of military action.

The Houthis were a natural first target. The last unbroken member of the Iranian alliance, they were the only ones that had benefited from conflict with Israel. Their leader, Abdelmalek al-Houthi, had long admired Hezbollah chief Hassan Nasrallah, and after his **assassination**, readily assumed the mantle of the public face of the resistance, emulating his defiant speeches and bellicose rhetoric. On entering office, the Trump administration first moved to **redesignate** the Houthis as a Foreign Terrorist Organization (FTO), restoring a far-reaching set of sanctions that threatened to hamper aid flows and ensnare what was left of Yemen's economy. Ultimately, Trump's stated aversion to military entanglements may have been overcome by his hawkish cabinet, an imagined deal with Iran, or the fact that the US had only recently paused its attacks against the Houthis. Indeed, the operation presented a chance to succeed where his predecessor had failed.

On March 15, the US recommenced **bombing** in Yemen. Reports suggest that the range of targets far exceeded earlier operations, with strikes targeting Houthi military commanders and facilities across northern Yemen, including troops near frontlines. Trump has **called** the Houthis “barbarians” who will be “completely annihilated,” and the group has responded with dozens of unsuccessful attacks against the US Navy and Israel. The US has released **little** information on the ongoing strikes, but it appears to have accurate targeting information and is sending additional ships to join the carrier group in the Red Sea.

## Unintended Consequences

Neither side will want to be seen as backing down. The official US **position** is that it is intent on destroying the Houthis' ability to jeopardize freedom of navigation. If the internal comments of senior US officials are taken at face value, they offer few other clues. According to Vice President JD Vance, "sending a message" was Trump's primary intention. US Secretary of Defense Pete Hegseth added that the operation was also about reestablishing deterrence, and has **said** publicly that the campaign will end when the Houthis commit to stop shooting. The problem is that absent a more comprehensive engagement, they are unlikely to do so.

Trump has made clear that he views the Houthis as an Iranian satrapy, that it is Tehran's hand guiding their Red Sea campaign, and that any Houthi response will be **viewed** as an Iranian response. This is an oft-repeated conflation, and not by accident. Iranian power projection benefited enormously, particularly vis-à-vis Saudi Arabia, from its relatively modest **investment** in the Houthis. The provision of advanced weapons, intelligence, and military advisors has entrenched a potent military actor on the kingdom's southern border. But Tehran was **reportedly** skeptical about the Red Sea campaign, and while the Houthis have become a far more important part of the Axis, their individual agency should not be understated. The group possesses a **discrete leadership**, a potent ideology, a domestic political agenda, and, emboldened by their string of military successes, an appetite for risk that far outpaces Tehran's. The Houthis operate as the de facto government in Yemen's capital, and their territory encompasses more than **70 percent** of the country's **39 million** inhabitants. Characterizing the Houthis as an Iranian proxy allows the US to sell the strikes as part of its pressure strategy. But this makes two assumptions beyond the available evidence: 1) that the Houthis would listen to Iranian instructions; and 2) that pressure on the group would push Tehran into talks. It may very well do the opposite.

It is unlikely that airstrikes alone will dislodge the Houthis from power. The difficulties of defeating ideological military organizations in rugged terrain were evident in Afghanistan. Israel has flattened much of Gaza in its attempt to rout Hamas, but the group was still **entrenched** at the ceasefire 16 months later. The Houthis have been fighting nearly **continuously** since 2004 and endured seven years of airstrikes from the Saudi-led coalition even before the US, UK, and Israel began bombing last year. None of it was **effective**. The number of Houthi fighters was estimated at some **350,000** last year, and it may have added thousands more in the interim on the back of its Red Sea campaign. The group's heartland in mountainous northern Yemen makes targeting difficult. Even if the US military is able to target the Houthi leadership, destroy stockpiled weapons and production facilities, and shut down smuggling routes, the group will likely survive. The Houthis would consider this a victory, and while it might buy a reprieve for maritime trade, this would be unlikely to last.

For the Houthis, engagement with the US lends **credibility** to their ideological project. Even during its early years as an insurgency against the regime of former Yemeni president Ali Abdullah Saleh, its members shouted the *sarkha* (literally, the scream): “Allah is the Greatest, Death to America, Death to Israel, A Curse Upon the Jews, Victory to Islam.” Some analysts believe that they may **relish** the **opportunity** to goad the US into a broader conflict in the region, much like Al-Qaeda after September 11, or that they are simply **counting** on the administration to lose interest as the campaign drags on.

In leaked communications, US Vice President JD Vance **voiced** concern merely that the operation could result in a spike in oil prices, and that the American public would not understand the necessity of the operation given how little US trade passes through the Red Sea. Hegseth added that the US could “easily pause.” But the US has entered a more complicated environment than it imagines. If the airstrikes are ineffective, the Houthis will continue their attacks. But if airstrikes - or sanctions - begin to affect the group substantively, the situation could rapidly escalate beyond Washington’s ability to manage it.

Two developments might be expected. The first is that the Houthis will target not just the US and Israel, against whom its weapons have been almost wholly ineffective, but undertake **new strikes** on Saudi Arabia and the UAE. Houthi leader Abdelmalek al-Houthi has begun escalating his public rhetoric against Riyadh as he taunts the US in near-daily televised speeches during Ramadan. Both Gulf states had been content to remain on the sidelines when the US began bombing last year - the West had repeatedly admonished Riyadh for a reckless bombing campaign in Yemen that killed **thousands** of civilians, and the UAE officially **withdrew** its forces in 2019 after international pressure forced the halt of a West Coast offensive over humanitarian concerns. Both seemed content to let the West learn the difficulties of the situation. Furthermore, they did not want to be targeted again by Houthi missile and drone strikes. Now, however, the Saudis appear willing to reengage, or at least to stomach the prospect that they could again be targeted. This was likely **communicated** to the US and informed its decision to undertake broader strikes - the leaked communications make clear a US desire to protect Saudi oil facilities. The kingdom has also made substantial military investments in the past few years and may have received additional assurances.

The second is the resumption of major hostilities in Yemen’s civil conflict. Government-aligned forces seem to be preparing for a return to war. When the Biden administration commenced strikes in January 2024, prominent West Coast military leader Tareq Saleh **visited** Western capitals to tout his group’s capabilities, likely seeking military support. Now there are rumors that the US is now encouraging anti-Houthi forces to act. At present, none are reportedly willing to do so without promises of air support and weaponry, which have yet to be forthcoming from either Washington or Riyadh. The level of coordination remains unclear. For its part, the internationally recognized government has been working to better coordinate its divided forces as the situation deteriorates, fearing Houthi escalation on both

the frontlines and the prospect of missile and drone attacks on the interim capital of Aden. Renewed fighting in Yemen would bring further casualties and civilian suffering. Some 370,000 people have already died during the conflict. Poverty and instability could create opportunities for other extremist groups, like Al-Qaeda, which retains a foothold in the south.

None of these developments would benefit the US. The political and military decision-making on Yemen in Washington, Riyadh, and Abu Dhabi has consistently failed to engage with the complexities of the conflict in Yemen and the vulnerability of its civilian population, resulting in unmet political objectives, political instability, and unnecessary casualties. If the US is only interested in stopping the attacks in the Red Sea, its best chance is to push for an end to the bloody war in Gaza. But if it wants to remove the Houthis' ability to hold global trade hostage, then the administration needs to consider how it can stabilize and unite the divided Yemeni government and restart the moribund peace talks. At present, it seems more distracted by how it can make Europe pay for the airstrikes.

Most tragically, the renewal of hostilities comes at a particularly precarious time for Yemen's civilian population. Yemen is one of the poorest countries in the world and remains one of the largest humanitarian crises, its recurrent flirtation with famine down to a failed economy, undone by a decade of conflict. Aid has been cut dramatically, not just by the US but across the West, threatening thousands of lives. The FTO designation is likely to cause further damage to what's left of the economy and could further constrict the provision of life-saving assistance. The Houthis have a long history of appropriating, manipulating, and redirecting aid for their own ends. Last year, the group began abducting humanitarian workers to gain leverage over the aid community. Houthi authorities recently demanded that all aid be brought in through the port of Hudaydah, which the group controls, saying they would confiscate overland shipments. Renewed fighting will exacerbate need and hinder access, and the humanitarian situation is likely to rapidly deteriorate. The Houthis are liable to take full advantage of this, parading the starving populace and blaming the Americans. Without a serious effort to restore aid - and peace - they will only be half wrong.



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