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and Hussam Radman

**Cover photo:** Protesters in Taiz city demonstrate on October 27, 2023, in solidarity with Palestinians and against Israel's military campaign in Gaza // Sana'a Center photo by Ahmed Al-Basha.



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.

A tenuous **ceasefire** has gone into effect in Gaza, halting two years of war that have resulted in the deaths of more than **67,000** Palestinians. As part of the first phase of a **US-brokered** agreement, surviving Israeli hostages taken by Hamas during its deadly October 7 incursion have been **released**, along with a number of **Palestinian prisoners**, and Israeli forces have begun a partial withdrawal from the strip.

However, the deal remains extremely **fragile**. Past ceasefires have failed to hold, and there are already **disagreements** over the return of the dead and humanitarian access. Hamas, which Israeli Prime Minister Benjamin Netanyahu had vowed to destroy, is already **reasserting control in Gaza**. The deal put forward by the US is intentionally vague, and thorny questions over the future administration of Gaza remain **unresolved**, even among international sponsors of the ceasefire.

With the prospect of renewed violence looming over negotiations, the future role of Yemen's Houthi group (*Ansar Allah*) in the conflict is an open question. The Houthis have been steadfast in their declared military support for the people of Gaza, targeting **Israel** with missiles and drones and attacking international **shipping** in the Red Sea as part of a purported **blockade**. The strikes have been a propaganda coup for the group and have won them substantial popular support at home and abroad. But retaliatory **airstrikes** by the US and Israel, in concert with the group's **designation** as a Foreign Terrorist Organization (FTO), have taken a material toll on the Houthis and worsened the economic and humanitarian **conditions** in areas under their control.

Below, Sana'a Center experts analyze the potential impact of the nascent Gaza ceasefire, including what it could mean for the Houthi-Israeli confrontation, the regional balance of power, and the prospects for peace in Yemen's own long-running war.

## Israeli Aggression Could Unite the GCC and Create an Opening for Peace

By Abdulghani Al-Iryani

If the Gaza ceasefire holds, Israel will next turn its attention not to the Houthis but to Iran, which it considers to be the existential threat. Israel has had Iran in its crosshairs for decades and has repeatedly tried to drag the US into attacking it, as it did Iraq in 2003. The Trump administration presents Israel's best and, given declining popular support in America for military adventurism, perhaps its last chance to get the US to fight Iran on its behalf. Israel will not miss this opportunity. Despite President Donald Trump's recent [statement](#) that he will bring Iran into the ongoing Middle East peace process, he will probably accede to the Israel lobby's pressure to strike. The US has carried out a massive military buildup in the region, clearly intended for Iran. If it strikes Iran again, it will not only target its nuclear facilities, but will go for the real threat to Israel: its missile production capabilities.

Would the Houthis act upon their commitment as a member of the Axis of Resistance to fight alongside Iran? They would be able to achieve little in the context of an overwhelming US-Israeli offensive. Any possible reward is not worth the sacrifice. Their popular base, passionate about the Palestinian cause, was willing to accept the cost of Houthi solidarity with Gaza. Not so with Iran. Common sense would suggest that they<sup>[1]</sup> will see the futility of military engagement, sit out the battle, and focus on reviving the roadmap for a settlement in Yemen that the Saudis keep waving in their face.

The fact of the matter is that Saudi Arabia, while disappointed by Houthi actions after October 7 and having had second thoughts about making a deal with them, does not have an alternative strategy. Its efforts to [reform](#) the Presidential Leadership Council (PLC) and unify the command of government forces have failed. Making a deal with the Houthis remains Riyadh's only viable option. However, to safeguard against future Houthi malfeasance, they will maintain their current alliances in Yemen as an insurance policy.

A crippling strike on Iran would reduce its ability to support the Houthis, leading to further degradation of Houthi military capabilities. That will remove the most insurmountable obstacle to peace in Yemen, the massive imbalance of military power between the disciplined and well-organized Houthis and the fractured anti-Houthi forces nominally under the PLC umbrella. This imbalance has made it impractical for the Houthis to even engage in peace negotiations with the internationally recognized government.

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[1] Several Saudi interlocutors have cited the 1970 North Yemen peace agreement between the Republicans and the Royalists as a model to be followed in dealing with the Houthis. Saudi Arabia stopped supporting its Royalist allies and established strong patronage relationships with several powerful republican leaders.

Israel's campaign has had a transformative effect that will reshape the geopolitics in the region. Its attack on Doha served as a rude awakening for the Gulf states, demonstrating that US protection will not preclude Israeli belligerence. Israeli hegemony and recklessness, enabled by unwavering US support, have become a more real and immediate threat to the region than that posed by Iran. For the Gulf states, the time for competing for US favors and bickering amongst themselves is over. The members of the Gulf Cooperation Council (GCC) were quick to close ranks after the Doha attack and demonstrated a solidarity not seen in years. Solidarity between Saudi Arabia and the UAE will reduce the second most insurmountable obstacle to peace in Yemen: the rivalry between these two states, which for years has prevented the establishment of a unified command of pro-government forces.

With these key obstacles to peace removed, Yemen now has a fighting chance of reaching a balanced and durable peace that preserves the sovereignty and territorial integrity of the country – perhaps its last chance.

## Fragile Agreements, Enduring Ambitions

By Maysaa Shuja Al-Deen

The Houthis' reaction to the latest agreement aimed at ending Israel's brutal military campaign in Gaza has been ambiguous, leaving open the possibility that they could resume attacks on Israel and in the Red Sea. In a speech on October 9, Abdelmalek al-Houthi emphasized that his group was prepared to maintain pressure for the implementation of the agreement and to continue supporting the people of Gaza. His response indicates that a resumption of attacks is likely, as the ceasefire agreement in Gaza remains fragile. The Houthis view their involvement as a source of leverage, underestimating the costs borne by Yemenis and the long-term consequences for the country.

Several factors could motivate the Houthis to continue their attacks. First, the Houthis' aspiration for regional influence has long been part of their ideological doctrine as a transnational group linked to a broader regional alliance. The Gaza war has provided a valuable opportunity to reinforce their image as an ambitious and influential regional actor.

Second, the weak political response of Arab, Muslim, and international actors to Israeli actions has fueled widespread anger. The Houthis have capitalized on this vacuum by positioning themselves as defenders of the Palestinian cause. This posture has earned them admiration far beyond their traditional sphere of influence and could embolden them to expand their regional operations.

Third, although the Houthis' attacks have disrupted progress on their agreement with Saudi Arabia—the so-called roadmap—they believe they can pursue both paths simultaneously. Saudi Arabia's security concerns have led to a strategy of containment rather than confrontation. The Houthis, therefore, expect to reap financial and political benefits from the roadmap without ceasing their attacks. Fourth, the Houthis' consolidation of power and perceived legitimacy have been closely tied to a state of conflict. During the brief truce in Yemen from April 2022 to October 2023, they struggled with the governance and administrative challenges that have persisted since their takeover of Sana'a in 2015. The return to wartime conditions helps them deflect internal pressures and maintain cohesion.

Lastly, despite being targeted by the US and Israel—and losing several key leaders and cabinet members—the Houthis have managed to project an image of resilience. These losses have, paradoxically, reinforced their portrayal of themselves as an invincible movement.

However, the Houthis' calculations overlook two critical points. Yemen's dire economic conditions persist, despite Houthi pressure on Saudi Arabia to ease restrictions, especially following the US FTO designation of the group earlier this year. There are clear limits to what Riyadh can concede as long as the Houthis continue their regional interventions. Furthermore, the Houthis operate under a false sense

of impunity, dismissing growing domestic frustration. Yemenis increasingly **view** the war against Israel as having little impact on the Palestinian cause while being deeply harmful to their own livelihoods. Relying solely on repression to maintain control is not sustainable in the long run.

Abdelmalek al-Houthi's speech and the group's overall stance suggest attacks will continue, which will serve the group's interests despite retaliatory airstrikes. Yet, the risks, both internal and external, are mounting. Ultimately, it will be increasingly difficult for the Houthis to reconcile military aggression with diplomatic engagement, popularity with poverty, or claims of legitimacy with systemic oppression.

## Will the Houthis End Their Attacks?

By **Hussam Radman**

Ceasefires in Gaza over the past two years have never been binding for the Houthis. In November 2023, when Gaza witnessed a brief humanitarian truce, the Houthis announced that they were not party to it and that they would remain active in the Red Sea. In March 2025, they took the initiative to escalate further in the Red Sea, citing the blockade imposed on Gaza as justification.

Recently, however, the Houthis' escalatory approach has appeared increasingly out of step with Hamas's negotiating position. In August, Hamas announced its acceptance of President Trump's proposal to end the war, but the Houthis responded by escalating hostilities, for the first time launching a ballistic missile with a cluster warhead deep into Israeli territory. In October, Abdelmalek al-Houthi delivered a fierce rhetorical attack on "Trump's plan," describing it as an attempt to strip away any form of Palestinian sovereignty and a reflection of Arab complacency. Even after Hamas endorsed the plan, the Houthis continued missile and drone strikes on Israel.

The tempo of Houthi escalation—particularly throughout this year—has been shaped more by Iran's regional calculations than by the war in Gaza itself. In July, the Houthis resumed attacks on commercial shipping for the first time in 2025, sinking two vessels. The operation served as an Iranian reminder of the effectiveness of its "forward defense" doctrine following the heavy blows it suffered during the 12-day war with Israel. It also signaled Tehran's intent to leverage the Red Sea card ahead of anticipated talks with Western powers. In September, the Houthis attacked a Dutch vessel, coinciding with heightened tensions between Iran and the European troika over the activation of a snapback mechanism for renewed sanctions.

The Houthis' cross-border operations may witness a temporary pause following the Gaza agreement. However, their pattern of escalation is unlikely to end as long as the US-European "maximum pressure" policy on Iran continues. The Houthis will likely invoke new pretexts for future escalation—claiming, for instance, that Israel has not fully withdrawn, that the blockade on Gaza remains in place, or that Yemen has decided to support Hezbollah against Israeli attacks.

Iran's use of Yemen as an arena for escalation predates October 7. During 2018–2019, the Houthis carried out attacks targeting Saudi oil tankers in the Red Sea, in addition to strikes on energy facilities inside Saudi Arabia. These actions formed part of Iran's broader "gray-zone" strategy—retaliatory operations against the US maximum pressure campaign and Trump's withdrawal from the nuclear deal.

With the growing likelihood of further direct military strikes on Tehran by Israel or the US, it would be more advantageous for Iran to act preemptively—drawing its adversaries into a proxy war in Yemen. Paradoxically, Israel may, in the coming days, initiate limited military provocations in Yemen to fabricate a new cycle of escalation against Iran as part of Netanyahu’s “escaping forward” strategy. It is also plausible that Israel could launch a broader strike in Yemen aimed at neutralizing the Houthis’ military capabilities in preparation for a wider assault on Iran.

The Houthis’ own internal calculations likewise appear inconsistent with any path toward de-escalation. The Houthis entered the war in Gaza hoping to emerge as nationalist heroes and to be recognized as the dominant player in Yemen. But the opposite happened: the “Axis of Resistance” contracted regionally, and the Houthis were hit with an economic siege, political isolation, and military strikes. Driven by security anxieties, they became more brutal toward civilians – conduct that has cost them popular sympathy inside Yemen. Accepting a ceasefire would mean confronting these bitter realities. Accordingly, escalation remains a strategic and ideological necessity for the group. The question is: in which direction will the Houthis escalate after the Gaza ceasefire?

Their first option is to reignite the civil war – a course that would risk bleeding the Houthis’ capabilities dry and would clash with Tehran’s interest in preserving the group for a potential regional confrontation. Their second option is to carry out punitive strikes against Saudi Arabia and the Gulf – but the cost would be devastating for Iran and could dash any chance of Saudi recognition or support via the roadmap. Finally, the Houthis could escalate in the Red Sea and strike deep inside Israel – a course that would align with Tehran’s calculus of wearing down its adversaries without crossing the threshold into full-scale war. It would also allow the Houthis to exert pressure on the international community to lift the economic siege on Yemen and return to the Saudi roadmap.

Abdelmalek al-Houthi may hope to continue cross-border operations until he compels US President Donald Trump into reaching a bilateral understanding that results in the lifting of the group’s FTO designation – much like what happened in May, when Trump announced a halt to military strikes against the “brave” Houthis.

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