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Saudi Arabia Under Pressure

By

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Executive Summary

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- ✦ The Saudi-Houthi conflict has become a major regional security crisis, intersecting with the wider Iran-U.S. confrontation and threatening Saudi Arabia's national security, energy infrastructure, and maritime interests.
- ✦ The Houthis pose a threat beyond the battlefield in Yemen, as their strategic position near the Bab al-Mandab Strait allows them to disrupt Red Sea shipping, global trade, and energy supplies.
- ✦ Iran gains strategic leverage through its support for the Houthis, but Ansar Allah retains its own political and military objectives and should not be viewed simply as an Iranian proxy.
- ✦ The U.S.-Saudi security partnership is facing renewed uncertainty, as Washington's reluctance to launch direct attacks against the Houthis has exposed a gap between Riyadh's security expectations and American strategic priorities.
- ✦ Saudi Arabia's efforts to diversify its defence partnerships reflect a growing desire for strategic autonomy, although no alternative partner currently appears capable of replacing the United States as the Kingdom's primary security guarantor.
- ✦ The Mecca Joint Defence Agreement between Saudi Arabia, Pakistan, and Turkey strengthens regional defence cooperation, but its effectiveness remains uncertain because deployment arrangements, military commitments, and operational responsibilities are not fully defined.
- ✦ Pakistan is better positioned than Turkey to provide immediate military support to Saudi Arabia, particularly through air defence, intelligence sharing, reconnaissance, and existing military deployments, although Islamabad is likely to avoid offensive operations in Yemen.
- ✦ Turkey can contribute valuable defence technology and intelligence capabilities, but constitutional requirements and concerns about escalating tensions with Iran make direct Turkish military involvement unlikely.
- ✦ Saudi Arabia's security crisis threatens the success of Vision 2030, as attacks on energy infrastructure, disrupted exports, and uncertainty over maritime trade jeopardise the revenues and investor confidence needed for economic transformation.
- ✦ The long-term stability of Saudi Arabia depends on the leadership's ability to adapt, including pursuing diplomacy with Iran, strengthening domestic institutions, prioritising viable economic investments, and restoring public confidence before regional instability exacerbates further.

Key Picture: Strategic Maritime Chokepoints of the Arabian Peninsula and Red Sea



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Source: [SEA](#)

1. Introduction

In July 2026, the Saudi-Houthi truce of April 2022 collapsed and Riyadh's conflict with Ansar Allah reignited.¹ These renewed hostilities have exposed significant vulnerabilities in Saudi Arabia's regional security posture, strategic partnerships, and economic ambitions. As warfare intensifies against the backdrop of the wider confrontation between Tehran and Washington, the leadership in Riyadh faces mounting challenges to the Kingdom's security, energy infrastructure, and maritime interests.

At the same time, Washington's reluctance to intervene directly against the Houthis has raised renewed questions about the reliability of the U.S.-Saudi security partnership, prompting Riyadh to pursue greater diversification through emerging defence arrangements with Pakistan and Turkey. These alternative partnerships, however, face considerable political and operational constraints, limiting their capacity to replace Washington's role. Beyond the immediate military challenges, the conflict also threatens Saudi Vision 2030, Crown Prince and Prime Minister Mohammed bin Salman (MbS)'s flagship economic transformation agenda. Ultimately, the crisis involving Ansar Allah and the wider Iran-U.S. confrontation raises fundamental questions about Saudi Arabia's regional ambitions, strategic autonomy, and long-term stability.

2. The Regional Significance of the Saudi-Houthi Conflict

What began as a Yemeni civil war quickly internationalised when the Saudi-led military coalition launched Operation Decisive Storm on 26 March 2015 with the aim of reversing the Houthi takeover of Sana'a and other parts of Yemen in 2014/15.² In the process, Yemen's conflict quickly became a major regional security crisis in

which rivalries between local and regional actors quickly intersected with the Islamic Republic of Iran and the United States' adversarial relationship and competition for power in the Middle East.

Years before the Houthis took over Sana'a in the mid-2010s, Iran had established links with the rebel movement while the U.S. had long been Saudi Arabia's close military partner, security guarantor, and arms dealer. Therefore, Houthi attacks on Saudi territory have imposed steep costs on a close U.S. partner in the Gulf Cooperation Council (GCC), making hostilities between Riyadh and Ansar Allah a major flashpoint in the wider Iran-U.S. confrontation. Throughout October 2026, Houthi attacks on vital civilian and energy infrastructure in the Kingdom have made this connection all the more explicit against the backdrop of the U.S.-Israeli war on Iran, launched on 28 February 2026.

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It is also necessary to take stock of Yemen's geography. Ansar Allah's position vis-à-vis the Bab al-Mandab provides the Houthi rebels with the ability to threaten the global economy by disrupting maritime trade and energy shipments via the Red Sea. When analysed within the wider context of the Iran-U.S. confrontation, Ansar Allah maintains the capacity to apply significant economic pressure on the United States, Saudi Arabia, and many other countries worldwide. Essentially, the Yemeni theatre is important to Washington for a host of reasons, including the impact of Houthi behavior on energy security, shipping costs, and other factors that prompt Washington to invest military resources in Yemen, Saudi Arabia, and the Red Sea.

The situation in Yemen underscores how Iran is capable of securing strategic leverage through indirect warfare. With Tehran backing the Houthi rebel movement, the Islamic Republic can threaten its enemies, rivals, and competitors without needing to constantly confront them directly. Ansar Allah, for its part, can capitalise on its alliance with Iran to bolster its military capabilities and bargaining power against Riyadh, underscoring how the Houthi-Iran alliance serves both Sana'a and Tehran's interests as local hostilities ultimately serve wider Iranian geopolitical objectives in the Arab world and beyond.

Nonetheless, it would be misleading and reductionist to describe Saudi Arabia's conflict with Ansar Allah as simply a "proxy war." Doing so avoids the fact that the Houthi rebel movement is a product of Yemen's unique political landscape, religious context, and history. Ansar Allah fights to achieve its own objectives such as consolidating power over more Yemeni territory and cornering Riyadh into making significant concessions to the Houthis. The Islamic Republic's support for Ansar Allah has been a major factor behind the Houthis' ascendancy, yet that does not demonstrate that the Islamic Republic has been controlling Ansar Allah as Iran would control a genuine "proxy." Ultimately, the Houthis have demonstrated their ability and willingness to advance their own interests irrespective of how those align (or misalign) with Tehran's.

Saudi Arabia's conflict with Ansar Allah is perhaps best described as a local and regional conflict that plays out within a wider regional confrontation between Tehran and Washington. Given the extent to which the escalating hostilities between the Kingdom and the Houthis have major consequences for Iranian and U.S. interests on the Arabian Peninsula and Red Sea, the warfare between Riyadh and Ansar Allah greatly impacts the Iran-U.S. confrontation. But the conflict dynamics between Yemen and Saudi Arabia can intensify, complicate, or even outlast the crisis between Tehran and Washington.

3. The Limits of the U.S.-Saudi Security Arrangement

The Saudi leadership has been doubting the reliability of the U.S. security commitment to the Kingdom for many years preceding the unfreezing of the Saudi-Houthi conflict in July 2026. The Saudi Aramco attacks of September 2019, for example, were a major incident that prompted Riyadh to further question the wisdom of remaining so dependent on Washington for its national defence.³ Nonetheless, the renewed hostilities that broke out between the Kingdom and Ansar Allah have significantly exposed the uncertainties surrounding the United States' commitment to Saudi Arabia's national defence.

Despite the close and personal relationship between U.S. President Donald Trump and MbS, which dates back to the first Trump administration (2017-21), the White House has, at least so far, refused to wage direct military strikes against Ansar Allah. With “Operation Rough Rider” having ended in May 2025 with an Omani-mediated U.S.-Houthi truce, it appears that the Trump team seeks to prevent that truce from collapsing.⁴ A major concern for the White House is that such direct U.S. military intervention against Ansar Allah could result in the Houthis targeting American vessels and other interests in the neighborhood while risking a scenario whereby Washington is pulled into the Red Sea, which would greatly expand the geographic scope of its confrontation with Iran prior to the U.S. November 2026 mid-term elections.

Although Houthi attacks on the Riyadh airport prompted scores of analysts to assess that the Trump administration would likely carry out direct attacks on the Yemeni rebel movement, the White House has so far limited its involvement to intelligence-sharing and targeting assistance. For Saudi Arabia, this limited U.S. military involvement underscores how much Washington’s strategic priorities have changed since 1990–91, when the United States deployed more than 500,000 troops to Saudi Arabia as part of a campaign to liberate Kuwait and protect other GCC states from Iraqi aggression.⁵ At this stage, the Trump administration’s top priorities in the Red Sea seem to be protecting freedom of navigation and avoiding moves that could widen Washington’s confrontation with Tehran. The risks of further regional escalation between now and the upcoming U.S. midterm elections also likely weigh into the White House’s calculations regarding the Houthis.

From Riyadh’s perspective, the lack of any direct U.S. intervention against Ansar Allah is concerning and frustrating. According to how the Saudis see the crisis, Washington is failing to understand the global implications of the Houthi attacks on Saudi Arabia while undervaluing the longstanding U.S.-Saudi relationship. As a result, Riyadh’s foreign policy will continue to value the U.S. as a security partner, but the Saudi leadership will become ever more committed to trying to reduce the Kingdom’s dependence on Washington through intensified efforts to diversify its international security partnerships. Yet, this quest to achieve greater diversification will face serious limitations given that no other power has the capability and willingness to replace the U.S. as a chief security guarantor for Saudi Arabia or another GCC member. Herein lies a dilemma for the Kingdom in the sense that the U.S. is a highly flawed security guarantor, but perhaps the only one that Saudi Arabia can realistically expect for now and throughout this upcoming period as the region’s growing disorder leaves the Kingdom increasingly exposed.

4. Saudi Arabia’s Security Partnerships with Pakistan and Turkey

The Mecca Joint Defence Agreement, signed by Saudi Arabia, Pakistan, and Turkey on 7 August 2026, establishes a new framework for West Asia’s security architecture.⁶ Under this pact, the three members are committed to assisting one another if an external armed attack occurs. Amid the escalating Saudi-Houthi hostilities, the trilateral security configuration has started to evolve from a diplomatic commitment towards a form of military cooperation that is more practical in nature.

Nonetheless, the Mecca Joint Defence Agreement must not be understood as a commitment on the part of Islamabad or Ankara to enter into Riyadh’s offensive campaign against the Houthis. Instead, this emerging security arrangement is more about Pakistan and Turkey protecting the Kingdom’s territory and vital infrastructure while minimising risks that Saudi Arabia is exposed to while fighting Ansar Allah.

A major development in the Mecca Joint Defence Agreement came on 5 October when the three signatories agreed to implement specific collective deterrence measures and facilitate the deployment of military forces to the Kingdom, subject to approval from Pakistan and Turkey’s national legislatures. The political signal was important: Saudi Arabia would not face Ansar Allah on its own with the Kingdom’s own military resources. However, this public announcement did not address certain details such as equipment, operational assignments, deployment schedules, or troop numbers. Essentially, although the Mecca Joint Defence Agreement has established a necessary framework for collective action, important questions about the configuration’s effectiveness remain unanswered for now.

In terms of near-term military support, Pakistan, more than Turkey, is strongly positioned to support Saudi Arabia. With roughly 8,000 troops already present in Saudi Arabia, along with JF-17 fighter aircraft, drones and a Chinese-made HQ-9 air-defence system operated by Pakistani personnel, Islamabad has a historically strong military relationship with Riyadh, meaning that there are existing arrangements for logistical support, training, and coordination.⁷ As Saudi Arabia struggles to protect strategic infrastructure, cities, and military bases on its soil, such Pakistani capabilities will prove important to Riyadh. Islamabad will also be able to meaningfully contribute to air-defence operations, intelligence sharing, and reconnaissance, ultimately permitting the Saudi military to devote more resources to its military campaign against Ansar Allah.

Nonetheless, there are political sensitivities in Pakistan which will prompt officials in Islamabad to maintain a necessary distinction between assisting Saudi Arabia with its national defence and becoming involved with offensive military operations inside Yemen. Similar to 2015, when the Pakistani parliament voted in favor of a neutral foreign policy toward the Saudi-led military campaign against the Houthis, Islamabad will currently maintain its emphasis on defensive support for the Kingdom.⁸

Not lost in the equation is Pakistan's relationship with Iran, the main state sponsor of the Houthi rebellion. Given the security crises plaguing Pakistan's Balochistan province, situated along the Iranian border, the leadership in Islamabad understands how tensions with Iran can exacerbate the chaotic unrest in this historically restive part of Pakistan. At the same time, with Pakistan at war with the Afghan Taliban, Islamabad recognises that a hostile relationship with Tehran can result in Iran moving closer to the Islamic Emirate regime in Kabul at the expense of Pakistan's own geopolitical and security interests. Lastly, with Pakistan vested in its diplomatic efforts to serve as a diplomatic bridge between Tehran and the Trump administration, Islamabad realises that its ability to continue in this role requires positive relations with Iran.

Therefore, Pakistan will ultimately be in favor of making substantial yet carefully bounded defensive contributions to the defence of Saudi Arabia that factor Islamabad's unique interests into account.

Turkey brings significant capabilities to the table with a defence industry that produces advanced air-defence systems, electronic warfare equipment, surveillance radars, and other technologies that have significant potential to assist Riyadh in the face of Ansar Allah's attacks. Yet, there are political constraints that will limit how far Ankara goes to help Saudi Arabia, including Turkey's constitution which requires the parliament to provide permission separately for deployment of troops overseas.

Turkey's Foreign Minister Hakan Fidan has been clear that the Mecca Joint Defence Agreement is defensive and that Ankara will not deploy its troops to wage attacks.⁹ There is every reason to conclude that the Turkish contribution to Saudi Arabia's defence will be based on intelligence sharing and military equipment rather than any commitment of its armed forces to a campaign inside Yemen. By striking this balance, Ankara will be able to prove its solidarity with Saudi Arabia without taking any actions that could exacerbate any tensions with Tehran or pull Turkey into a protracted military conflict on the Arabian Peninsula.

It is important to understand that the Mecca Joint Defence Agreement, while important to Saudi Arabia's strategies for fighting the Houthis, does not at all guarantee Riyadh a victory over Ansar Allah. This is because the security configuration requires its signatories to calculate the nature and extent of their assistance to Saudi Arabia instead of automatically committing to deploying troops for combat operations. In sum, while Pakistan and Turkey are positioned to bolster the Kingdom's defences and help Saudi Arabia defend its infrastructure, truly defeating Ansar Allah in this conflict would require military efforts that are much broader than anything which either Islamabad or Ankara would commit to given unavoidable political factors. While the pact is valuable to Pakistan and Turkey, both powers will want to ensure that they maintain limits on their commitments to Riyadh amid this conflict.

5. Can the Saudi State Adapt Before the Crisis Deepens?

For more than a decade, MbS has been committed to Saudi Vision 2030, the Kingdom's grandiose agenda aimed at achieving economic diversification away from oil and transforming Saudi Arabia into a modern economic powerhouse, which attracts foreign investment, tourists, and business. Yet, as Saudi Arabia faces enormous security challenges, Vision 2030 is experiencing major setbacks that cast much doubt on the Kingdom's transformation. Some analysts warn that these security crises also raise fundamental questions about the future of the Saudi leadership and state itself.

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The extent to which Saudi Arabia's vulnerabilities are exposed reflects serious miscalculations on Riyadh's part. Despite investments in defence to the tune of tens of billions of dollars, the undeniable truth is that the Kingdom is failing to defeat a non-state adversary with significantly fewer resources at its disposal. Heavily dependent on expensive Western defence systems, Saudi Arabia faces security challenges made all the more complicated by its dispersed infrastructure across the Kingdom's vast territory while the Iran-U.S. confrontation leaves the Kingdom increasingly vulnerable to spillover effects.

At this stage, Saudi Arabia's revenues that are necessary for financing Vision 2030 are jeopardised by regional conflicts that Riyadh seems to have no means to control. Disruptions to oil exports, uncertainty surrounding key shipping routes, and damaged energy infrastructure leave the Kingdom unable to meet the expectations of a youthful Saudi population whose future depends on Vision 2030's success.

With MbS having greatly consolidated his own power since his ascendancy began in the 2010s, the Crown Prince has sidelined many royal rivals and weakened the influence of traditional Wahhabi institutions in Saudi Arabia. To his credit, MbS' reforms have done much to modernise many aspects of Saudi society, but they have also fueled resentment among certain parts of the Al Saud family as well as other constituencies. Taken together, these tensions raise delicate questions about the Saudi monarchy's durability at a time in which the Middle East's conflict dynamics intensify.

Although bold predictions about the Saudi ruling family's collapse are too speculative at this point, declining public confidence in the Kingdom's leadership could create serious challenges that MbS would need to address. This is not to say that it is too late for MbS to solve the problems before his country. There are still opportunities for the Saudi leader to pragmatically engage Iran diplomatically and prioritise viable economic investments while shoring up domestic institutions that could restore stability and confidence among the general public. A key question is whether MbS will be able to adapt to these new conflict dynamics in manners that can protect the Saudi Arabia's vital interests before these disastrous conditions spiral out of control.

NOTES

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