



IPS INSIGHTS

Perspectives On the Issues Shaping Policy

Between Escalation and De-escalation: Regional Security in the Middle East

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Regional Security Environment

- **Houthi–Saudi Escalation:** From October 6 to 12, the Houthis struck three Saudi airports, killing at least 20 people and injuring more than 370. On 20 October they claimed six more operations in 48 hours against Aramco facilities at Yanbu and Shaybah, plus Riyadh and Abha airports. Saudi Arabia has not confirmed all of these, so treat the damage claims with caution. The attacks are real, though: Riyadh has postponed its flagship investment conference over security concerns.
- **Ground Situation in Yemen:** The Houthis (Ansar Allah) captured Mocha on September 10 and Mayyun Island in the Bab al-Mandeb a day later, and both these places still remain in Houthi hands. The Yemen government's "Dawn of Yemen" offensive, launched on October 5, has changed front lines very little after more than two weeks. A Yemeni military source blamed entrenched Houthi defenses and weak coordination, and said the UAE's full withdrawal from Yemen left a significant gap in support. So it is a Houthi advantage that has stalled, not a collapse of the government side.
- **Blockade of Bab al-Mandeb:** This is a selective blockade, not a closure. ACLED notes that the Houthis target vessels

they define as Saudi-linked and say other shipping can transit freely if governments stay out of the conflict. It is still serious, because Saudi Arabia relies on the Red Sea as an alternative route when the Strait of Hormuz is disrupted.

- **Strait of Hormuz:** It has been largely blocked or disrupted for more than seven months. The June deal collapsed on July 8, and the US reinstated its naval blockade on July 14.
- **Iran's Defense Minister:** Aziz Nasirzadeh was killed on February 28, and parliament has now approved Mehrdad Akhlaghi. He is a longtime missile-industry figure. Appointing a missile specialist signals Iran is prioritising rebuilding its arsenal.
- **Foreign Visits:** US Secretary of State Hegseth made an unannounced trip to Israel and met Netanyahu at Ovda Air Base as Washington and Jerusalem consider renewed action against Iran. Russian Foreign Minister Sergei Lavrov visited Tehran and Pakistan's CDF, Field Marshal Asim Munir, is currently visiting Tehran. Lavrov reaffirmed economic agreements and noted the gradual return of Russian experts to Bushehr. Munir's visit is his fifth since the June agreement.

A Pre-Storm Pause?

- **Electoral Calendar:** Netanyahu said he

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wasn't planning fresh strikes before Israel's October 27 election, and Trump has said he won't attack Iran before the US midterms in November. Iran appears to understand this: Iranian officials told Reuters that they were deliberately prolonging talks until after the November 3 midterms while preparing for renewed strikes. Both sides are using the pause to position.

- **Diplomacy is Stuck:** Iran's seven-day plan would reopen Hormuz if the US lifts its port blockade, releases frozen assets and waives oil sanctions. Washington wants the nuclear program addressed first, and Trump has publicly rejected Iran's latest offer.
- **Military Signals:** Hegseth's visit appears to indicate operational coordination rather than diplomatic engagement. Netanyahu has reportedly told Trump they have "a job to finish." Israeli reporting says the military chief warned that an operation could force the election to be postponed, since Iran would retaliate against Israel. This suggests that the likeliest window for renewed strikes would open after October 27, and more likely after November 3.

Factors that Cut Against a Clean "Storm" Reading

- **The Munir and Lavrov Visits are Partly Mediation, Partly Signaling:** Iranian officials are downplaying the mediation angle and framing Munir's visit as bilateral, and a breakthrough cannot be predicted.
- **Pakistan Has a Delicate Role:** Pakistan is mediating with Tehran. Meanwhile,

Turkey, Pakistan, and Saudi Arabia agreed on October 5 to activate deterrence measures under their mutual defense pact, including the rapid deployment of forces to Saudi Arabia to counter the Houthis.

- **Iranian Leadership Opacity:** Supreme Leader Mojtaba Khamenei has not appeared publicly since taking office, so it is unclear who is really making decisions, which raises miscalculation risk.
- **Russian Support Has Limits:** Moscow offers diplomatic cover and Bushehr cooperation, not obvious military rescue.

An Objective Assessment

The most likely sequence is continued Houthi pressure on Saudi Arabia through late October, then a decision point right after the US midterms. If there is a renewed US- Israeli campaign against Iran, then it will follow a familiar pattern, with Iran retaliating against Gulf bases and shipping, and the Houthi front becoming its Red Sea extension. The main alternative is a face-saving agreement on the Strait of Hormuz, brokered by Pakistan and Qatar. However, disagreement over the sequence of negotiations—addressing the nuclear issue first or lifting the blockade first—makes an agreement difficult to achieve in the near term.

Key Indicators to Watch: *The Israeli election result, US military movements, tanker war-risk insurance rates, Saudi confirmation of damage at Yanbu or Shaybah, and any confirmed Pakistani or Turkish deployments to the kingdom.*

