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More than a Proxy: Complicating Houthi Pathways to Escalation

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The Houthi movement, claiming the mantle of the Yemeni nation-state despite lacking international *de jure* legal recognition, is the Islamic Republic of Iran's (IRI) most successful, capable, and potentially lethal regional ally in its battered "Axis of Resistance," a constellation of non- and quasi-state armed groups that, since the 1980s, have played integral roles as part of what the IRI refers to as its "forward defense."[1] The Houthis, who refer to themselves as both the Yemeni state and *Ansar Allah* (God's supporters/partisans), are also firmly rooted within the complex social, political, historical, and regional contexts of Yemen and actively pursue a range of domestic interests and goals that they seek to balance with their external alliances with the IRI; Hezbollah in Lebanon, with whom they have a much longer direct relationship with than the IRI directly; and Iraqi groups allied with Iran, chiefly those currently operating within the Islamic Resistance in Iraq (IRI umbrella) and Brigades of the Guardians of Blood (*Saraya Awliya al-Dam*) umbrellas.[2] This article argues that the Houthis' pursuit of a complex set of often, but not always, related—but not completely aligned—domestic, regional, and international interests, goals, and their ideal desired end state of international recognition allows for a significant degree of political, ideological, and operational flexibility while at the same time presenting potential pressure points that the United States and its allies and partners can use to complicate the Houthis' calculations regarding pathways to escalation in the current conflict with the IRI and other Axis of Resistance groups.

Houthi Origins and Evolution: From Nonstate to Quasi-State Actor

The Houthi movement (hereafter referred to as Houthis) is centered on the charismatic leadership of the al-Houthi family, first under its founder, Husayn al-Houthi, and his father, Badr al-Din, the latter of whom was a widely respected religious scholar within the Zaydi branch of Shi'ite Islam, most of whose practitioners today live in northern and north-central Yemen, and the Houthis' current leader, Husayn's younger brother, Abd al-Malik.[3] The Houthis and other Zaydi Muslims in northern Yemen accused the Yemeni government of long neglecting their home province of Sa'ada and other areas in the north while also encouraging the spread of Salafi/Wahhabi Sunnism in the Zaydis' northern heartlands to weaken the sociopolitical and religious authority of Zaydi *sayyid* families, those claiming to be direct descendants of the Prophet Muhammad, the founder of Islam.[4]

During a series of rebellions that came to be known as the "Sa'ada wars," the Houthis regularly outperformed and outmaneuvered government forces who relied on heavy arms and tactics not ideally suited to combating a dogged, highly mobile insurgency with substantial local support operating primarily in mountainous terrain.[5] As their battlefield resilience solidified and successes mounted, Houthi political goals expanded, and they sought to expand their influence by forging alliances with sympathetic tribes and, later, to woo defectors from the government and its supporters, engaging in sustained politicking within the broader context of Yemen's tribal landscape.[6] The Yemeni government alleged that the Houthis were receiving direct support from the IRI, though evidence for this claim was sparse and contested.[7]

Between March 2013 and January 2024, Yemeni factions including the Houthis participated in the National Dialogue Conference in the federal capital, Sana'a, as part of a United Nations (UN) and Gulf Cooperation Council-backed effort to reach a negotiated agreement to transition Yemen past the regime of longtime president Ali Abdullah Saleh, who was forced to resign after sustained mass demonstrations across the country throughout 2011 and 2012.[8] The Houthis, who expanded

their territorial holdings during the Arab Spring in Yemen that ousted Saleh and fractured his ruling party, the General People's Congress (GPC), entered into the National Dialogue conditionally.[9] The fragile transition process from Saleh to a new central government under his vice-president-turned-president, Abd Rabbuh Mansur Hadi, fell apart between August–September 2014 following Houthi-backed mass protests against the end of government fuel subsidies that culminated in the Houthi capture of Sanaʿa on 21 September.[10]

While capturing Sanaʿa and seizing an increasing amount of territory across multiple governorates to the south, west, and east, including parts of the strategically important Hudaydah, Ta'iz, and Ma'rib governorates in 2015 and 2016, the Houthis moved to woo defectors from opposing factions, including GPC officials and members of the military and security forces, over to their side by continuing the patronage politics used successfully for decades by Saleh.[11] Though they were driven back from the southern port city of Aden in 2015, the Houthis still control Yemen's main Red Sea port city of Hudaydah, which they continue to use, along with nearby strategic islands including Kamaran to project power in the maritime space. The Houthis currently are pressing to shift the long, largely stagnant frontlines on the ground between itself and Yemeni factions opposed to it in key areas, including the Ma'rib and Hudaydah governorates, the former of which is where some of the country's remaining hydrocarbon resources, including crude oil and liquified natural gas, are located.[12]

Though they did not initially start out to take over the Yemeni state, the Houthis' organizational goals in the political sphere have dramatically expanded since their origins in the late 1990s as the "Believing Youth" and the early 2000s during the Saʿada wars to their point today, where the Houthis and their government claim to be acting in the name of the Yemeni nation-state. Indeed, all of the attacks that the Houthis have carried out in and adjacent to the Red Sea and Bab al-Mandab since the hijacking of the *Galaxy Leader* cargo ship in November 2023 have been claimed by the Houthi-controlled "Armed Forces of the Republic of Yemen," an important piece of symbolic framing that clearly demonstrates how the Houthis wish to be seen domestically, regionally, and internationally.

Houthi Strategy and Calculations since the Start of the Iran Conflict

The Houthis waited a full month before entering the ongoing conflict between the United States and Israel on one side and Iran and most of its major non- and quasi-state allied groups in the Axis of Resistance umbrella on the other. They launched the first of four (as of 2 April 2026) separate salvos of ballistic and cruise missiles and one-way attack drones at the Israeli cities of Eilat and Tel Aviv-Jaffa, linking their entrance into the conflict with not only strikes in Iran but also other regional issues including air strikes on Iraqi groups allied with Iran, the war between Israel and Hezbollah in Lebanon, and continuous Israeli strikes in Gaza and raids in the West Bank.[13]

The key question is this: Why did the Houthis, who are a key Iranian regional ally and who have benefitted greatly from the transfer of Iranian armaments and other technologies, wait a full month before deciding to enter the conflict, particularly when it was, at the start, unclear how long the IRI could continue carrying out significant missile and drone attacks and mining in the Strait of Hormuz while much of the regime's upper political, security forces, intelligence, diplomatic, and military (both the Artesh and the Islamic Revolution Guard Corps) leadership echelons and infrastructure were decimated by Israeli and U.S. airstrikes?

In other words, the decision to delay full military engagement in the conflict, sticking to rhetorical support for the IRI and the other Axis of Resistance groups, when considered alongside the widespread assumption that the IRI would have no choice but to quickly capitulate after suffering so many significant losses to its leadership and military and security forces, suggests that the Houthis are wrestling internally to attempt to balance, as much as possible, their domestic, regional, and international goals that are centered on ultimately achieving international recognition of their control of the Yemeni nation-state, ideally *de jure* recognition but otherwise through a continued *de facto* acquiescence. These goals are often but not always aligned, forcing the Houthi leadership to consider which set of goals are, during a given time period, the most important to them organizationally and institutionally. Iranian-supplied armaments and other military technology have undoubtedly significantly empowered the Houthis by allowing them to project power far outside of Yemen, including over key maritime spaces in the Red Sea, the Bab al-Mandab, and into the Gulf of Aden and the Arabian Sea, while also strengthening their hand against domestic rivals on the ground inside Yemen, most of whom remain at loggerheads with each other, a continuing hurdle preventing the formation of a truly united anti-Houthi front that will pose a real threat to their hold on power on the ground.

The Houthis' alliance with the IRI and also Hezbollah in Lebanon, whose media and messaging apparatus the Houthis have modeled their own on down to the choreography of Abd al-Malik al-Houthi's televised speeches and religious lectures, is also undoubtedly important to the Houthis.[14] However, the Houthi command and control structure must also consider how to most effectively sell their decisions to, at the very least, their own domestic supporters. The Palestinian national cause is widely popular in Yemen and is not tied to support for or opposition to the Houthis, making the invocation of the Palestinian cause the easiest and "cheapest" way of framing and marketing domestically their military involvement, first in 2023–24 and, now, since 28 February 2026, due to its widespread popularity across Yemen, including among anti-Houthi factions such as the Saudi Arabia-backed Islah Party.[15] Indeed, the Houthis' public, routinized invocation of Gaza and the broader Palestinian-Israeli conflict seems to have solidified Houthi-Islah negotiations alongside advances in direct Houthi-Saudi negotiations with Omani diplomatic mediation that picked up in April 2023 following the People's Republic of China's stewarding of Saudi-Iranian diplomatic rapprochement.[16]

A second key open question is this: Why have the Houthis not decided, up to this point, to substantially interrupt shipping traffic through the Red Sea or target the Saudi industrial city and Red Sea oil-exporting hub of Yanbu, the former of which they have a demonstrated capacity to do and the latter of which is well within range of its missiles and drones? Doing one or both would significantly compound the regional and international effects of the struggle over and closure of the Strait of Hormuz.[17] Though fragile, the Omani-mediated Houthi-Saudi ceasefire continues to be abided by despite the conflict with Iran because it is strategically and economically valuable to both sides. For the Saudis, the Houthis have stopped conducting cross-border attacks, including refraining from missile and drone strikes on oil infrastructure. For the Houthis, the Saudis have stopped conducting air strikes targeting them after launching, with the United Arab Emirates (UAE) and other Arab

Coalition states carrying out more than 25,000 such strikes between 2015–22, have seemingly blessed ongoing Islah-Houthi negotiations, and have agreed to provide nearly $350 million USD in aid to pay for the "operating expenses," including paying government salaries, a portion of which goes to Houthi-controlled areas.[18] The ceasefire with the Saudis benefits the Houthis significantly by providing some economic relief and removing, at least for now, a significant anti-Houthi faction as a unified actor from the Yemeni conflict.[19] The January 2026 Saudi assertion of primacy of influence projection in Yemen over the UAE, which saw the kingdom conduct extensive air strikes in January 2026 against the then-UAE-backed Southern Transitional Council, causing it to factionalize and formally cease to exist as a major player, also benefits the Houthis by degrading one of the most effective forces to counter the Houthis in southern Yemen.

Consequently, it is in the Houthis' interests to maintain the ceasefire with Saudi Arabia amid severe regional turmoil, requiring the Houthi leadership to carefully calibrate their involvement and related decision making to simultaneously signal their capacity and potential willingness for phased escalation while also avoiding restarting a costly tit-for-tat direct conflict with Yemen's powerful northern neighbor. The Houthis have clearly signaled that they are pursuing a calibrated/phased escalation—or, potentially, a deescalation—strategy, stating, "The Yemeni Armed Forces affirm that their military intervention in this significant and exceptional battle is a gradual/scaled intervention. Relying upon God and seeking His assistance, [the Armed Forces] declare that they will not limit their involvement to the present level. Rather, they will respond to future developments in accordance with the trajectory set by the enemy—whether that be escalation or de-escalation."[20] Abd al-Malik al-Houthi also recently sought to reap the reputational benefits of Houthi missile and drone targeting of Israel, claiming that the Houthis had "restored deterrence" in the region and "prevented" the United States and Israel from using the Red Sea to attack the IRI, while continuing to limit his forces' engagement in the conflict.[21]

Conclusion: Complicating Houthi Decision Making and Undermining the Axis of Resistance

Debates on the nature of Houthi decision making run the gamut between seeing the Houthis as merely a proxy/puppet of the IRI to the argument being made here that the Houthis are a key Iranian regional ally that are simultaneously pursuing a range of domestic goals that they hope will ultimately achieve their desired end state of full political control and international *de jure* or, at the very least, *de facto* recognition as holders of state authority in Yemen. The Houthis' organizational hybridity requires them to consider both their domestic, Yemen-centric goals alongside their broader regional goals, bringing to light the inherent tensions between them. The Houthis have a record of choosing to act in concert with the IRI and other Axis of Resistance groups as well as also prioritizing their own domestic goals, such as taking over Sana'a in September 2014, even if they did not coincide with Iranian state interests.[22]

The Houthis' alliance with the IRI is significant, and the former has moved closer ideologically and politically to the latter since the Sa'ada wars while still retaining both organizational and theological distinctiveness from the latter's system of "guardianship of the supreme jurist" (*velayati-i faqih*).[23] The Houthis are also the most powerful and expansively capable of the IRI's Axis of Resistance allies, a fact greatly enhanced by Yemen's adjacence to several strategically key maritime spaces (listed above), which in turn enables them to assist the IRI in exerting additional pressure from the southwest to not become directly involved militarily in the ongoing Iranian conflict while the IRI can exert direct pressure from the east.

The Houthi movement has been shaped ideologically by a mix of Zaydi revivalism and different aspects of multiple Islamist currents, including the thought of the late Ayatollah Ruhollah Khomeini, Sunni jihadism, and the Muslim Brotherhood, that it combines with domestic politicking among Yemen's powerful tribes.[24] While drawing significant inspiration from Khomeini and subscribing to the "global resistance" framing against alleged U.S. hegemony in the Middle East, the Houthis have also firmly sought to embed themselves in Yemen's complex sociopolitical environment using a combination of both political-ideological messaging and economic incentives, particularly by adopting and expanding on neopatrimonial strategies of "divide-and-rule" governance favored for decades by the late President Saleh.[25] This ideological, political, organizational, and motivational hybridity provides the Houthis with flexibility while also creating pressure points that the United States, in partnership with its regional allies such as Saudi Arabia, can use to complicate the Houthi leadership's calculations and assumptions about the range of potential effects of full military engagement in any continuation of the conflict with the IRI and the other Axis of Resistance groups.

ENDNOTES

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