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Perspectives On the Issues Shaping Policy

Who Are the Houthis? From a Ragtag Militia to a Regional Power Broker

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For years, the Houthis were dismissed as a rugged Yemeni militia fighting from the mountains of northern Yemen. Today, that description is dangerously outdated. The movement has evolved into a disciplined, battle-hardened armed organisation possessing ballistic missiles, cruise missiles, drones and increasingly sophisticated maritime capabilities. Its recent advance along Yemen's Red Sea coast and its grip over strategic positions around Bab al-Mandeb have transformed the Houthis from a Yemeni insurgency into a regional strategic actor.

The question now is no longer simply who controls Yemen. It is whether the Houthis are emerging as a new power capable of altering the balance of power in the Middle East. Recent developments suggest that they are already doing so. On September 15, 2026, the Houthis launched renewed missile and drone attacks against Saudi military targets, including an attack on a military airbase at Khamis Mushait that reportedly injured civilians. At the same time, Houthi forces have made significant gains on Yemen's western coast, including strategically important positions near the Bab al-Mandeb.²

Who Exactly Are the Houthis?

The Houthis take their name from Hussein Badreddin al-Houthi, a Zaydi Shia religious and political leader who launched an insurgency against the Yemeni government in the early 2000s. The movement emerged partly in reaction to what its followers saw as political marginalisation, corruption, Saudi influence and the spread of Sunni Islamist and Wahhabi ideas in traditionally Zaydi northern Yemen. The movement became known as "Ansar Allah" (Supporters of God).

The Houthis' rise accelerated dramatically after Yemen's political collapse following the Arab Spring. In 2014 they seized Sanaa and subsequently expanded south and west. Their advance eventually brought them into direct conflict with Saudi Arabia, which intervened militarily in 2015 in support of Yemen's internationally recognised government. What began as a relatively poorly equipped insurgency gradually became a formidable military organisation.

The transformation is remarkable. The Houthis have acquired and developed increasingly sophisticated missiles and drones, learned from years of fighting Saudi-led forces and developed the ability to threaten shipping hundreds of kilometres from Yemen.

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² Timour Azhari and Jana Choukeir, "Houthis Strike Saudi Targets Anew as Talks over Strait of Hormuz Stall," Reuters, September 15, 2026, <https://www.reuters.com/world/middle-east/houthis-strike-saudi-targets-anew-talks-over-strait-hormuz-stall-2026-09-15/>

Iranian assistance has clearly contributed to this transformation. The Council on Foreign Relations describes Iranian support as having significantly enhanced Houthi military capabilities and their ability to project power into the Red Sea.³ Yet Tehran continues to deny being directly responsible for Houthi military operations. Iran again denied involvement after the latest Houthi attacks on Saudi targets.⁴ This ambiguity suits both sides.

Iranian Proxy or Independent Movement?

Calling the Houthis simply an “Iranian proxy” is convenient but incomplete. There is little doubt that Iran provides political, technological and military support. Iranian and Hezbollah personnel have reportedly assisted Houthi operations inside Yemen.⁵ But the Houthis are not Hezbollah in the sense that they are simply an Iranian-created organisation. They have indigenous roots, their own political agenda and a distinctly Yemeni identity. This distinction matters.

The Houthis have demonstrated that they are capable of pursuing their own interests while simultaneously advancing Iranian strategic objectives. This makes them potentially more dangerous than a conventional proxy because Tehran does not necessarily have to issue every instruction. Iran gains a powerful regional partner without having to deploy large numbers of Iranian troops. The Houthis gain access to technology, expertise and strategic depth. It is a mutually beneficial relationship.

Bab al-Mandeb Changes Everything

The greatest Houthi strategic asset is not simply their missiles. It is geography. Yemen sits astride the Bab al-Mandeb, the narrow maritime gateway connecting the Red Sea with the Gulf of Aden and the Indian Ocean. For decades, the strait was considered primarily

a commercial waterway. The Houthis have demonstrated that it can also become a strategic weapon.

Their recent capture of positions along Yemen’s western coast and around the Bab al-Mandeb has brought one of the world’s most important maritime chokepoints within their effective military reach. The Houthi advance has included the strategically important island of Perim, while government forces have struggled to contain the offensive.⁶ This gives the Houthis something most non-state armed groups do not possess: the ability to influence international commerce simply by threatening a narrow stretch of sea. The implications are enormous.

If Hormuz is controlled or threatened by Iran and Bab al-Mandeb is controlled or threatened by the Houthis, the two ends of the Arabian Peninsula’s maritime energy corridor become vulnerable simultaneously. That is a strategic nightmare for Saudi Arabia and the Gulf states.

The Saudi Predicament

Saudi Arabia has fought the Houthis for more than a decade. It has deployed considerable military resources, aircraft and sophisticated Western weapons against them. Yet military superiority has not translated into decisive victory. The Houthis have proved extraordinarily resilient. The latest escalation is particularly embarrassing for Riyadh because the movement is now capable of attacking Saudi military installations while simultaneously threatening Saudi maritime commerce.

Saudi Crown Prince Mohammed bin Salman reportedly appealed directly to Donald Trump for American military action against the Houthis. Trump declined to launch direct US strikes, although Washington agreed to

³ Council on Foreign Relations, “Iran’s Support for the Houthis: What to Know,” Council on Foreign Relations, <https://www.cfr.org/articles/irans-support-houthis-what-know>

⁴ Agence France-Presse, “UPDATED: Houthis Claim Attack on Saudi Base as Iran Denies Involvement in Yemen War,” Ahram Online, September 14, 2026, <https://english.ahram.org.eg/NewsContentP/2/576621/World/UPDATED-Houthis-claim-attack-on-Saudi-base-as-Iran.aspx>

⁵ International Crisis Group, “Bab al-Mandab, Yemen,” International Crisis Group, accessed September 16, 2026, <https://www.crisisgroup.org/trigger-list/iran-usisrael-trigger-list/flashpoints/bab-al-mandab-yemen>

⁶ <https://www.reuters.com/world/middle-east/houthis-strike-saudi-targets-anew-talks-over-strait-hormuz-stall-2026-09-15/>

provide intelligence and targeting support.⁷ That decision is significant. Washington appears reluctant to open yet another military front when the United States is already confronting Iran and dealing with the consequences of disruption in the Gulf. For Saudi Arabia, however, the problem cannot simply be wished away.

The New Houthi Weapon: Artificial Intelligence

Perhaps the most intriguing development is the reported use of artificial intelligence by Houthi-linked weapons engineers. Recent reporting based on disclosures by Anthropic indicates that users in Houthi-controlled northern Yemen attempted to use its Claude AI system in the development of advanced weapons, including missile guidance, control and navigation systems.⁸

This does not mean that the Houthis have suddenly acquired an autonomous AI missile force. But the development is nevertheless significant. AI can reduce the technical barriers to designing weapons, analysing engineering problems, developing software and improving guidance systems. A relatively poor non-state actor may consequently gain access to capabilities that previously required large research establishments. This could become one of the most consequential developments in twenty-first-century irregular warfare. The Houthis are demonstrating that technological sophistication does not necessarily require an advanced industrial economy.

Can the Houthis Become a Major Middle-Eastern Power?

They already possess some characteristics of a regional power. They possess a territory and an armed force based on a substantial number of personnel, they have missiles and drones in their arsenal, they can threaten international shipping, they can strike Saudi Arabia whenever they want, they have also

demonstrated political endurance, and, most importantly, they occupy a position of extraordinary strategic value, yet becoming a major Middle Eastern power is another matter.

The Houthis lack the economic resources, population, industrial base and conventional military capabilities of Saudi Arabia, Iran, Turkey or Israel. Yemen itself remains one of the poorest and most devastated countries in the region.

The Houthis therefore cannot realistically become another Saudi Arabia or Iran. Their strength lies elsewhere. They are becoming a *strategic spoiler*. A spoiler does not need to dominate a region. It only needs to possess enough capability to prevent others from achieving their objectives. This is precisely what the Houthis are increasingly capable of doing.

A New Balance of Power?

The Middle East has traditionally been dominated by states. The Houthis represent something different: the rise of a non-state actor capable of affecting the calculations of major states. That is their real significance. Saudi Arabia must now consider Houthi missiles whenever it plans its military operations. The United States must consider the security of Red Sea shipping. Israel must consider attacks from Yemen. Shipping companies must calculate the risk of sailing through the Red Sea. Iran can use Houthi capabilities to complicate the strategic calculations of its adversaries without necessarily entering every confrontation directly. And the Gulf states must ask whether their enormous investments in conventional military power are sufficient against a relatively inexpensive missile-and-drone threat.

The economic consequences could be even greater. If shipping through Bab al-Mandab becomes unreliable, vessels may be forced to travel around the Cape of Good Hope. That

⁷ "Saudi Crown Prince Sought US Military Help from Trump with Houthis, Sources Say," Reuters, September 11, 2026, <https://www.reuters.com/world/trump-declines-saudi-crown-princes-call-us-strikes-houthis-axios-reports-2026-09-11/>

⁸ A "Houthis Used AI Platform Claude to Develop Ballistic Missiles," Middle East Eye, <https://www.middleeasteye.net/news/houthis-used-ai-platform-claude-develop-ballistic-missiles>

means longer journeys, higher insurance premiums, greater fuel consumption and increased transportation costs. The Houthis therefore do not need to sink hundreds of ships. They only need to make the route sufficiently dangerous.

The paradox of Houthi power

There is, however, a limit to Houthi power. The more territory they capture and the more openly they threaten international commerce, the more likely it becomes that powerful states will eventually unite against them. A militia can survive airstrikes. It is much harder for it to govern a country. The Houthis still face opposition from Yemeni factions, tribal forces and Saudi-backed forces. Yemen itself could once again descend into a devastating civil war. Nor should Saudi Arabia be underestimated. Riyadh possesses enormous financial resources, advanced weaponry and powerful international relationships. The Houthis may

win battles, but converting military success into sustainable political authority will be much harder.

The Future

The most likely future is therefore not a Houthi takeover of the entire Middle East. It is something more subtle and potentially more enduring. The Houthis could become Yemen's dominant political and military force while retaining the ability to threaten the Red Sea and Saudi Arabia. In that position, they would effectively become Iran's most important strategic partner on the Arabian Peninsula without necessarily becoming a subordinate Iranian instrument.

Their greatest achievement may ultimately be to transform geography into power. A poor country with limited economic resources can nevertheless exercise disproportionate influence if it controls access to a global maritime chokepoint. And that may prove to be their greatest weapon of all.

