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An Heir and a Spare?

How Yemen's "Southern Hezbollah" Could Change Iran's Deterrent Calculus

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A military truck carries a massive Quran image during a military parade held to mark the anniversary of the Houthi takeover of Sanaa, September 21, 2023. Reuters.

The Israel-Hamas war has underlined the strengths and weaknesses of Iran's extended deterrence system, which encompasses a coalition of militias drawn from the populations of Lebanon, Iraq, Yemen, the Palestinian territories, Syria, and other countries.[1] On the plus side for the "axis of resistance," all its partners have provided some level of military support for Hamas since the October 7, 2023, attack on Israel. This has either been through direct attacks targeting Israeli territory or, indirectly, by striking U.S. military bases—employing the rationale that the United States is supporting Israel in the conflict. The extended deterrence system has also seemingly responded to orders from above, stopping operations almost entirely during the November 24–December 1 ceasefire and avoiding steps that might trigger unintended escalation against Iran, Syria's Assad regime, or Lebanese Hezbollah by either Israel or the United States.

Yet the limits of some axis of resistance assets have also been clear, in particular the Iranian and Lebanese reticence to gamble the future of Iran's premier partner, Lebanese Hezbollah, by striking the Israeli interior and crossing other Israeli and U.S. red lines to support Hamas. On November 3, Hezbollah secretary-general Hassan Nasrallah confirmed this quandary when he reacted to Israel's ground operation in Gaza with a fiery but de-escalatory speech signaling that his movement had done enough to hold one-third of Israeli forces away from the Gaza battle and that now other pro-Iran militias had their chance to act in support of Hamas.[2] Both Iran and Hezbollah itself seem to know that the Lebanese group is too valuable a piece on the regional chessboard to sacrifice for Hamas. Taking everything into account, the extended deterrence system ultimately failed to prevent Israel from invading Gaza.

Enter the Houthi putschists in Yemen—the de facto rulers of the capital, Sanaa, and much of northern Yemen since their coup nine years ago. Since the October 7 attack, it has been Yemen's Houthis—not Lebanese Hezbollah—that have made the first attempts to strike Israeli critical infrastructure with Iran-provided advanced conventional munitions. For the first time, Iran is fighting a regional conflict not only alongside its "heir," Lebanese Hezbollah, but also with spare deterrent capacity provided by its new military protégé, the Houthis.

Since October 27, about a week after the Houthis started their military strikes against Israel, the Houthis have launched three medium-range ballistic missiles (MRBMs) at Israel, something no enemy has done since Iraqi leader Saddam Hussein fired Scud missiles at Israel in 1991, and something that Iran itself has never done. The Houthis have also launched at least eight salvos of cruise missiles and long-range explosive drones at Israel, focused on the southern port of Eilat. One U.S. military MQ-9 Reaper drone has been shot down by the Houthis during the crisis, and numerous Houthi missiles and drones have been routed near U.S. Navy vessels. If further developed, the Houthis may give Iran, Hezbollah, and the broader axis of resistance a new piece to use on the chessboard of their deterrent strategy.

This paper is intended to help U.S. policymakers and influencers understand why the Houthis would take such risks on behalf of Hamas, the axis of resistance, and Iran. The short answer is that the Houthis are neither Iranian proxies nor wartime partners of convenience. Based on evidence gathered in a multi-year research effort by The Washington Institute and the West Point Combating Terrorism Center,[3] a strong case can be made that the Houthi-Iran relationship should not be viewed as one of necessity but rather as a deep-rooted alliance underpinned by tight ideological affinity and geopolitical alignment. Today, a "southern Hezbollah" in Yemen is arguably a fact on the ground. Even as the United States seeks a peace accord in Yemen, the current reality suggests the need to develop a pragmatic U.S. policy of containing and ideally diminishing Houthi military and political power within Yemen. Positioned astride the world's most strategic maritime lanes, Yemen will matter greatly to the United States (and its adversaries) in the future, and it should not be allowed to fall entirely under the control of a southern Hezbollah.

The Houthis During the Gaza Crisis

Houthi military actions have increased dramatically since the Iran-led axis of resistance joined Hamas in the war following the October 17 al-Ahli Hospital explosion in Gaza City, as illustrated in figure 1. Activating their military front a day later than pro-Iran Iraqi militias, the Houthi contribution to the axis effort began October 19, when the Houthis launched nineteen cruise missiles and drones toward Israel,[4] with all but one apparently intercepted by the air defense destroyer USS *Carney*, then on-station covering Israel's southern flank in the Red Sea. (One cruise missile appears to have been downed by a Saudi air-launched interceptor.) Then, on October 27 and 31, Israel intercepted new northbound drones,[5] some of which crashed in Jordan and northern Sinai. Most dramatically, the Houthis launched an Iran-made Zolfaqar MRBM at Israel on October 31, which was intercepted by an Israeli Arrow 2 interceptor missile near Eilat.[6]

Figure 1.

Houthi Attacks on Israel, the U.S. Military, and Global Shipping Since the October 7 Crisis Began*

ATTACKS ON ISRAEL
MARITIME ENVIRONMENT

OCTOBER

7 Houthis fire four land attack cruise missiles and fifteen drones toward Israel. All are intercepted by a combination of interceptors launched by the USS *Carney* and Saudi air defenses.

19 Houthis fire an unknown number of drones toward Israel, which are intercepted by Israeli air defenses near Eilat and fall on the Egyptian towns of Taba and Nuweiba.

27 Houthis fire an unknown number of ballistic and cruise missiles toward Israel. All appear to be intercepted by Israel, with one falling in Mudawwara, Jordan. Israel's Arrow 2 system is used successfully.

31

NOVEMBER

5 Houthis fire an unknown number of missiles and drones toward Israel. All appear to be intercepted by Israel.

8 Houthis shoot down a U.S. MQ-9 drone over international waters in the Red Sea off Hodeida, Yemen.

9 Houthis fire an unknown number of ballistic missiles toward Israel. All appear to be intercepted by Israel, whose Arrow 3 system is used successfully.

Houthis threaten to attack Israel-linked shipping in the Red Sea.

14 Houthis fire an unknown number of drones toward Israel. All are destroyed by interceptors launched by the USS *Thomas Hudner*.

19 Houthis utilize a helicopter assault to seize the *Galaxy Leader*—an Israeli-owned tanker leased to Japanese operators—in the Red Sea.

23 Houthis claim to fire an unknown number of drones toward Israel.

24 Gaza ceasefire begins, and Houthi attacks on Israel cease, along with attacks on U.S. bases in Syria and Iraq.

26 Houthis fire what the U.S. Department of Defense calls an "Iranian-made" KAS-02 drone toward Israel. The drone is intercepted by the USS *Carney*.

29 USS *Mason* disrupts piracy against the tanker *Central Park*, and Houthis fire two long-range rockets into the nearby sea.

DECEMBER

3 Three commercial ships are struck by Houthi antishipping missiles in the Red Sea. USS *Carney* shoots down three Houthi drones operating in close proximity to the *Carney* and commercial shipping.

6 Houthis fire one medium-range ballistic missile at Israel, which is intercepted by Arrow 3.

USS *Mason* intercepts one Houthi drone.

*As of 23:59, Dec 6, 2023, Yemen

Since then, the Houthis have launched drones or missiles toward Israel on at least eight occasions (at the time of writing), including two more Zolfaqar strikes that were intercepted by Arrow 3 interceptors, plus a number of drones intercepted by U.S. Navy vessels in the Red Sea. The Houthis also appear to have the dubious distinction of being the only axis of resistance partner to attack Israel during the November 24–December 1 ceasefire, through a long-range drone launch on November 29 that was intercepted by the USS *Carney* in the Red Sea. The Houthi mixed-weapon salvos—combining MRBMs, cruise missiles, and drones—build on similar tactics tested against Saudi Arabia in 2021.[7]

In parallel to strikes on Israel, the Houthis have taken a number of aggressive steps toward shipping and U.S. military vessels in the Red Sea. Setting aside the possibility that some of the drone and cruise missile attacks since October 19 were aimed at U.S. Navy vessels—and not merely past them, on track toward Israel—the Houthis have also undertaken confirmed attacks on U.S. assets. The first deliberately anti-U.S. strike came on November 8, when Houthi air defenses shot down a U.S. MQ-9 Reaper drone off the coast of Hodeida, the approximate location from which many Houthi drones and cruise missiles have probably been launched. On November 14, the Houthis escalated again by threatening to attack Israeli vessels in the Bab al-Mandab Strait and Red Sea, a threat they realized quickly on November 19 when a helicopter-borne Houthi boarding party and more than a dozen speedboats seized an Israeli-owned, Japanese-leased tanker called the *Galaxy Leader*. During the November 24–December 1 Gaza ceasefire, the Houthis responded aggressively to a U.S. naval boarding action against Somali pirates in the Red Sea, splashing two projectiles (referred to as "ballistic missiles" by the United States) into the sea ten miles away from a U.S. warship, the USS *Mason*,[8] coincidentally the same ship the Houthis had previously attacked with antishipping missiles during a crisis in October 2016.[9] As noted earlier, another Houthi drone was intercepted by the USS *Carney* in the Red Sea on November 29.

Houthi Risk Acceptance in the Current Crisis

In the current Gaza crisis, the Houthis have demonstrated greater risk acceptance than Iran, Lebanese Hezbollah, Assad-led Syria, or Iraq's pro-Iran militias. After more than two decades of purely rhetorical resistance to Israel, the Houthis moved unhesitatingly in October 2023 to undertaking ballistic and cruise missile and drone attacks against the Israeli homeland at a moment of extraordinary tension, when Israel appeared quite likely to retaliate.[10] The Houthis furthermore fired numerous projectiles directly at or near U.S. naval vessels on a high state of alert, and shot down a valuable U.S. drone, risking a clash with American forces. (In October 2016, the United States struck back against Houthi radars after the unsuccessful antishipping attack on the USS *Mason*, so the Houthis had experienced U.S. retaliation before.)

This risk-acceptant behavior can be explained partly by geographic and historical context. The Houthis have been embroiled in brutal warfare for almost all of the last twenty years, so exposure to enemy airpower does not hold the same shock effect for them as for other potential recipients of U.S. or Israeli retaliation. The Houthi leadership is well hidden, employing remarkable operational security measures, and the country is perhaps large enough and distant enough that the Houthis may doubt Israel's capacity to strike back effectively at short notice. The Houthis might also calculate that the United States and Israel are unlikely at this moment to risk upsetting the Yemen peace process, which is drawing close to some form of Saudi-brokered resolution and which both Washington and Riyadh are keen to conclude so that Saudi-U.S. and Saudi-Israel diplomatic initiatives might move forward in the future.

But in addition to these calculations, the Houthis display a level of ideological determination and ambition almost unique among Iran's partners in the axis of resistance. Lebanese Hezbollah and the Iraqi factions certainly try to support Iran's strategic needs, but they also actively balance Iran's needs

against their own domestic survival calculations and state capture strategies. As the detailed discussion to follow will evidence, the Houthis' ideological "fit" with the Islamic Republic of Iran—and their shared enmity against Israel and the United States—is arguably so close that the most senior Houthi leaders see their interests and obligations as indistinguishable from the Islamist revolutionaries in Iran. As a result, Iran is not exercising control over the Houthis in this crisis, but rather allowing them to demonstrate their superior commitment to the objectives of the axis. The Houthis need only be let loose, not necessarily told what to do.

Thinking Through the Emergence of a "Southern Hezbollah"

More broadly, the current crisis offers an opportune moment to think through the implications of a potential southern Hezbollah to complement the northern one in Lebanon. The motif used for many years to envisage this outcome—mainly on the hawkish right—was that of an Iran-led "Shia Crescent" in the Middle East, cutting a swath from Iran in the north through Iraq, Syria, and Lebanon and southward into Yemen. Using the same kind of imagery, Iranian commentators have themselves claimed Iranian control of four Arab capitals—Baghdad, Beirut, Damascus, and Sanaa—which one parliament member in September 2015 famously claimed "belong to the Islamic Iranian revolution."[11] The Houthi leader, Abdul-Malik al-Houthi, put it more poetically, saying in November 2014 that "Barack Obama, after having drunk from the poisoned chalice at the gates of Damascus, the walls of Gaza, and the suburbs of Baghdad, was drinking from it for the fourth time in Yemen."[12]

Regardless of how imprecise or even hyperbolic these claims may have seemed in the past, the Israel-Hamas war has caught Israel in a pincer between northern and southern arms of Iran-organized opponents. This is a reality now; not a model. And if the Houthis have in fact entered into the deterrent equation as an embryonic but confident and fast-maturing "southern Hezbollah," then what does that foreshadow for crises involving Israel, which invariably draw in the United States? How might it affect great power competition in the region?

Iranian Proxy, Hezbollah Clone, or Just Fellow Traveler?

The Houthis—formally Ansar Allah (Partisans of Allah)—are a family and caste-based leadership group that requires some explaining to appreciate their relationship to Iran and Lebanese Hezbollah. The Houthi movement's composition has changed throughout its life span. Its "first incubator," in the words of Marieke Brandt, a preeminent anthropologist of the Houthi area,[13] involved the tribal marriage ties of movement founder Badr al-Din al-Houthi, a religious scholar who married five times and fathered thirteen sons who lived to adulthood. This created a network of families and in-laws across the Khawlan tribal confederation of northern Yemen that empowered Badr al-Din in the 1970s. In addition to being a charismatic preacher, Badr al-Din and most key Houthi leaders until today are *sadah*—collectively, Ahl al-Bait, descendants of the Prophet Muhammad—thus seeing themselves as superior to other Yemenis and the only caste fit for leadership.

What made Badr al-Din and his sons unique even among *sadah* was the combination of (1) their membership in the Jarudi sect of Islam's Zaidi branch; and (2) their steadfast dedication to the example of Iran's 1979 Islamic Revolution, and the subsequent export of the revolutionary model to Lebanon via the Hezbollah movement. The Jarudi belief structure is important because the Houthis are the only Yemenis to adhere to the same principles as the prevalent Twelver strand of Shia Islam dominant in Iran, Iraq, and Lebanon. In theological terms, this means that Jarudis and other Twelvers believe the proper line from Muhammad runs via one descendant—the Fifth Imam, Muhammad al-Baqir—via a strictly defined set of divine imams to a messianic Twelfth Imam, while the non-Jarudi majority of Yemen's Zaidis

("Fivers") believe in a different line of descent and method of succession. In the realm of power politics, these affiliations mean that Badr al-Din and his sons were warmly welcomed by the fledgling Islamic Republic and by Hezbollah in the 1980s and 1990s.

The second "incubator" of the Houthi movement, to once again borrow the term, was a Zaidi revivalist movement called Believing Youth, led by Badr al-Din and modeled after post-revolutionary Iran and Hezbollah—i.e., propagating ideology through summer camps, youth indoctrination efforts, social programs, and a political party. By the early 1990s, Badr al-Din and his senior sons had two main political influences: Iran's first Supreme Leader, Ayatollah Ruhollah Khomeini, and Osama bin Laden, both of whose speeches they followed with particular fascination due to their willingness to stand up to Israel and to American "arrogance."[14]

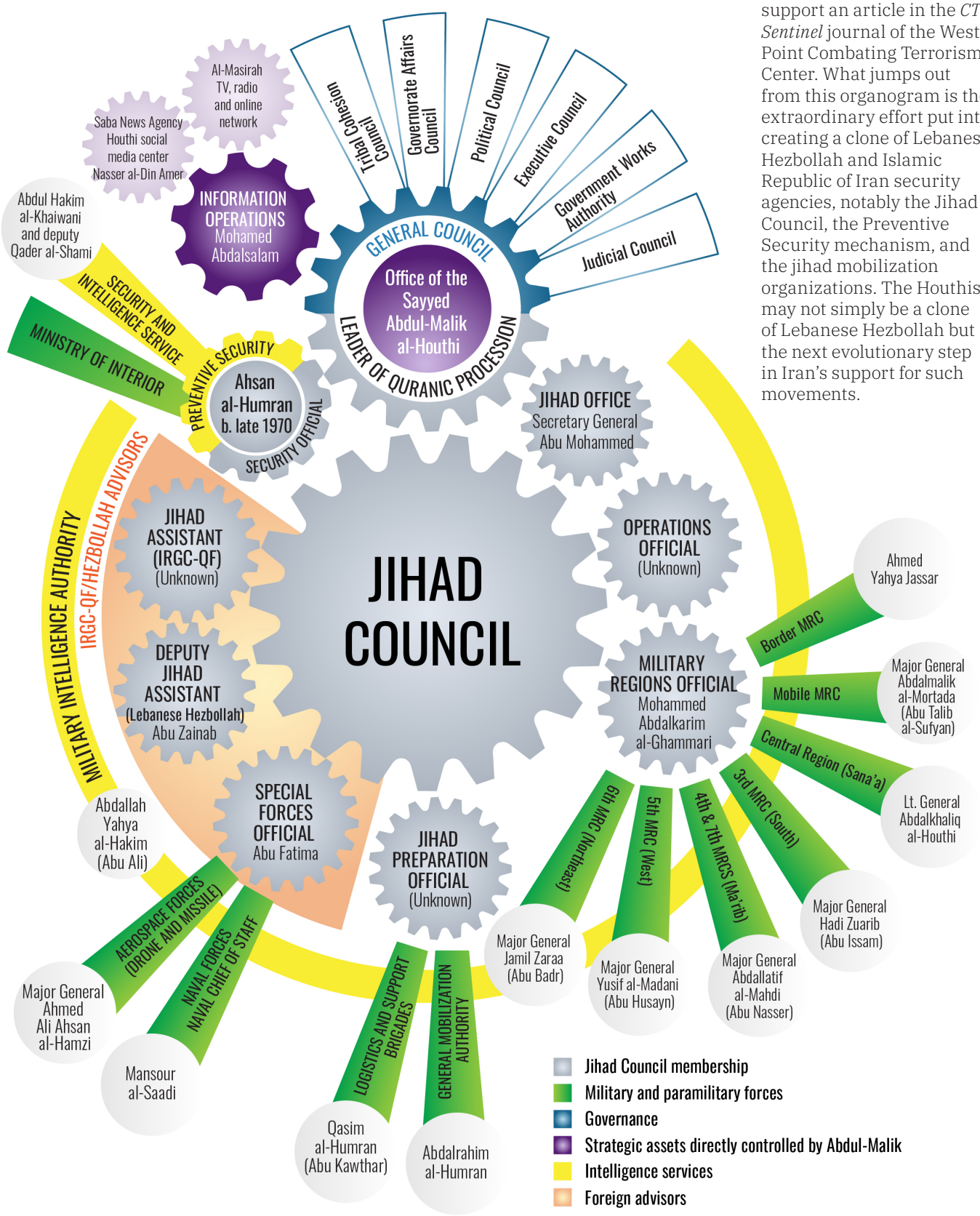
In 1994, Badr al-Din and his oldest son, Hussein, began sending forty religious students a year to Qom—a flow that would eventually produce around eight hundred Qom-trained students,[15] some of whom, based on similar treatment of Lebanese, Saudi, and Bahraini students, are likely to have been groomed with paramilitary training by the Islamic Revolutionary Guard Corps (IRGC).[16] In 1999–2000, Hussein spent a year studying religion in Khartoum at a time when Sudan was the most active IRGC and Iranian Ministry of Intelligence outstation on the Red Sea.[17] He thereafter traveled to Iran and, upon returning to Yemen in 2001, introduced the now infamous slogan that supercharged the Houthi movement, known as The Scream (*al-Sarkha*): "Death to America / Death to Israel / Curse upon the Jews / Victory to Islam." Though Hussein was killed by the Yemeni government in 2004, this remains the Houthi slogan until today. The Houthis, however, no longer control small corners of remote mountains, as they did in the early 2000s, but rather the most densely populated third of Yemen and its capital, Sanaa, a mini-state with a population of 14 million and—if U.S.-backed peace talks conclude—a commanding share of Yemen's mineral wealth along with restored aerial transportation and maritime ties to the rest of the axis of resistance.

IRGC and the Houthis: Not Wartime Partners but Soulmates

The early narrative of the current Yemen war has been that the Houthis are a reluctant partner to the IRGC, driven into the Iranian force's arms by the Saudi-led military response to the 2014 Houthi coup in Sanaa. Yet this narrative falls apart under detailed investigation. A combined U.S.-Yemeni research effort, including work by this author, in *CTC Sentinel*—the publication of the West Point Combating Terrorism Center—documented in unprecedented depth how the Houthi-IRGC relationship was never a marriage of necessity, but rather a decades-spanning, highly intentional shared effort to replicate the Lebanese Hezbollah model inside Yemen[18] (see figure 2). The Houthis' Ansar Allah movement is not a proxy of Iran; rather, it is a fully committed fellow traveler embodying a deliberate—and successful—effort to clone Hezbollah. When Badr al-Din died in 2010, five eligible older sons were bypassed in order to elevate Abdul-Malik, then a young man in his early thirties but also the companion who had joined him on more visits to Iran than any other son, and who most closely shared the founder's pursuit of an Iran- and Hezbollah-modeled Islamic revolution. Abdul-Malik leads Ansar Allah today and, given his relative youth, could run northern Yemen for decades, perhaps beyond the reign of Hezbollah's sixty-three-year-old Hassan Nasrallah.

Amid their closeness with the IRGC, the Houthis have absorbed costs for Iran and the axis of resistance during recent Middle East crises. For instance, on May 14, 2019, the Houthis claimed to have launched drones against Saudi Arabia's vital East-West Pipeline, but this attack was subsequently shown to have originated when Iranian drones were launched from Iraq.[19] Then again, on September 14, 2019, the Houthis initially claimed to have undertaken drone and missile attacks on Saudi Arabia's largest oil processing plant at Abqaiq, a claim later proven to be false.[20] (The attacks were conducted by Iranian forces from launch points in Iran and Iraq.) Both of these episodes came during the tenure of U.S. president Donald Trump and could easily have drawn a heavy U.S. response targeting Ansar Allah and

Figure 2. Houthi Jihad Council



The Washington Institute's original graphic created to support an article in the *CTC Sentinel* journal of the West Point Combating Terrorism Center. What jumps out from this organogram is the extraordinary effort put into creating a clone of Lebanese Hezbollah and Islamic Republic of Iran security agencies, notably the Jihad Council, the Preventive Security mechanism, and the jihad mobilization organizations. The Houthis may not simply be a clone of Lebanese Hezbollah but the next evolutionary step in Iran's support for such movements.

Yemen. At the very least, they soured international sympathy for the Houthis.

Despite such downsides, Abdul-Malik evidently did not hesitate to offer up his movement to camouflage Iran's actual launch points. In the context of the 2023 Israel-Hamas war, this willingness has surfaced once again, with the Houthis risking major Israeli and U.S. retaliation in contrast to both Hezbollah and Iran's partners in Syria and Iraq, which have been much more circumspect in their actions. On November 9, 2023, the Houthis even repeated their earlier practice by falsely claiming a drone attack on Israel that actually originated in Abu Kamal, Syria, possibly diverting retaliation away from other members of the axis of resistance. Iran has developed a responsive, risk-acceptant partner in the Houthi movement, and the Houthis are outshining other axis members—notably the Iraqi militias—in derring-do, devotion, and overall utility. The Gaza war of 2023 may be seen in retrospect as the moment when the Houthis moved to the next level of confidence, ambition, and aggressiveness.

A Bigger, Badder Hezbollah?

Credited with an arsenal of 130,000 missiles, rockets, and drones, Lebanese Hezbollah is used to being the biggest and scariest attack dog in Iran's axis of resistance.[21] Established by Iran in 1982, Hezbollah had overpowered all its domestic rivals by 1989, including other Iran-backed militias sponsored by the Amal Party, a distinction no other Iranian partner achieved until the emergence of the Houthis in northern Yemen. For instance, in today's Syria, the Assad regime plays a nonstop backroom game aimed at preventing exactly this kind of consolidation of Iran-backed groups on its territory; Iraq's disparate militias compete and scratch like cats in a bag,[22] driving their Iranian handlers to distraction; and the Palestinian groups were historically so fractious that Monty Python even lampooned their bewildering number of fronts in *The Life of Brian*.[23] In contrast, Iran built up Hezbollah—literally, the Party of God, a uniquely prestigious name—as a favorite son gifted with unprecedented transfer of what the U.S. Defense Department calls "advanced conventional weapons"—accurate drone, rocket, and missile systems, plus intelligence support and training that rivals the IRGC's own.

Now, for the first time, Hezbollah has a unified peer competitor—the Houthi movement. In contrast to smaller wings of the axis of resistance in Iraq and Syria, where Iran bets on multiple horses and fosters competition, the IRGC backs one horse in Yemen—Abdul-Malik al-Houthi—just like it backs Hezbollah leader Hassan Nasrallah. Iran's favoritism toward the Houthis as its shiny new ally does not seem to cause animosity between Hezbollah and Ansar Allah: based on the deep research effort undertaken for the earlier-noted *CTC Sentinel* paper, the Houthis defer to their Lebanese "big brothers" in a way that the Houthis are loath to do with any other foreigners, whether Arabs or Iranians. But Yemen's Partisans of God (Ansar Allah) are arguably developing a lot faster than the original Party of God did in Lebanon, and the Houthis have a tighter grip on domestic opposition. Furthermore, they will eventually control a larger country with an even more strategic position than tiny Lebanon. In time, they could thus outgrow their Hezbollah mentor.

Let's look at the evidence to back up this thought experiment. Starting with the basics, Houthi-controlled Yemen has nearly three times the population of Lebanon, translating into foot soldiers (as a later section will detail). The Houthis also have natural resources. Yemen is ranked twenty-ninth in the world for oil reserves and thirty-first for gas, and the Houthis constantly try to capture the country's most prolific energy fields, in the meantime using drone strikes to prevent the internationally recognized government from monetizing those fields until the Houthis receive the lion's share.[24] In contrast, Lebanon does not crack the top hundred for oil and ranks 114th for gas, practically dead last among world producers. (Lebanon's Block 9 drilling results were completed just days before the Israel-Hamas war erupted and showed no commercially viable gas discoveries.[25]) A Saudi-Houthi peace

deal—and a resumption of Yemeni oil exports—will be conditioned on a revenue-sharing deal that sees half or more of oil and gas proceeds going to the Houthis. This could be more than a billion dollars a year, a significant addition to around $2–3 billion of existing annual revenues going to the internationally recognized Yemeni government. (While this is a low level of income for a nation, it compares favorably with Lebanon, where government revenues have completely collapsed and where the state is beset by an even deeper economic and monetary crisis than Yemen.[26]

A southern Hezbollah also has sheer physical space and standoff distance from Israel that Lebanese Hezbollah will never have. Lebanon is just over four thousand square miles in area, while Houthi-controlled Yemen covers 27,000 square miles, even if the Houthis never conquered another mile of the country. Proximity to Israel has been a factor in Hezbollah's favor as a part of Iran's extended deterrence system, but it also means that Israel can invade Lebanon at will and that Israel is constantly overhead, offshore, and raiding inside Hezbollah's home turf. As long-range precision-strike systems proliferate, the more distant Yemen is shaping up, like eastern Syria and western Iraq, as an increasingly attractive launchpad for Iran's attacks on Israel, the Gulf, and U.S. bases and ships too. It is close enough to reach out and touch Israel—and Saudi crown prince Muhammad bin Salman's NEOM giga-project, the Suez Canal, and the holy cities of Mecca and Medina—but also sufficiently far away and mountainous to pose real military and intelligence challenges to Israel, Saudi Arabia, and America.

Iran's Fast-Tracking of Its Yemeni Partner Force

Iran seems to agree with this assessment, because it is building up Ansar Allah much faster than it did Lebanese Hezbollah. Partly, this is a product of context: precision-strike systems are more available and easier to build today than in past decades from commercially available subsystems, such as drone engines, avionics, and mission planners. Of course, these contextual factors apply to Iraq's militias too—many of which have been working with the IRGC for as long as Lebanese Hezbollah—yet these Iraqis have been left in the dust by the Houthi development of long-range strike systems. Perhaps Iraqi militias are harboring long-range guided tactical missile systems like the Iran-provided Houthi Badr-1P, but these have never been used or even shown off at a parade, which probably would have happened by now due to the undisciplined nature of the Iraqi groups. (Even in the current Gaza crisis, the most advanced Iraqi-operated system used has been an unguided rocket called al-Aqsa 1.)

Iraqi fielding of Iran-provided drone systems such as the Qasef-2K has likewise been limited, stingily and highly conditioned by the IRGC. Iraqi use of the Qasef-2K in 2022 lagged a year behind the first use by the Houthis and Hamas in 2021.[27] Is this because the Houthis have been in a major conventional war with Saudi Arabia since 2015? Maybe, but Iraq's militias have also fought tough struggles with the Islamic State and with the United States since 2015, and they would have appreciated the help and the status symbols of Iran's newest drones and rockets—as opposed to the flying trash cans (under the moniker of improvised rocket-assisted munitions) that they used to barrel-bomb targets. (The Washington Institute's Militia Spotlight platform assesses that some Iranian drone systems shown at Iraqi parades were literally "loaners" for the parade that were then withdrawn, a rather pathetic sign of Iran's lack of trust.[28])

In contrast, the Houthis went from launching unguided Katyusha rockets against targets twenty miles away in 2014 to launching medium-range ballistic missiles at Riyadh, six hundred miles away, by 2016. It is the Houthis who have been enabled by Iran to leapfrog the Iraqi militias in military capability. In 2004–9, the Houthis were hemmed into their northern mountain region of Saada and unable even to seize ground from decrepit Yemeni government forces or execute a sophisticated road-side bombing attack—whereas Iraqi farmers and Afghan tribesmen at that time collectively mounted hundreds of effective attacks a week. The 2010

military entry of Iran and Hezbollah into the Houthi wars prompted an abrupt turnaround.[29] Hezbollah-style Houthi commando tactics helped defeat the Saudi military on its own border, leading to a loss of Saudi farmland that remains unreversed to this day. From 2011 to 2014, the Houthis utilized Iranian and Hezbollah training support to mount a devastatingly effective expansion campaign that exploited post–Arab Spring chaos in Yemen and which employed exactly the same intelligence-led "stick and carrot" tactics with northern tribes that Hezbollah employed in its own expansion within Beirut and southern Lebanon. In September 2014, after the Houthis overthrew the United Nations–backed, U.S.-supported Yemeni government, they nearly overran the rest of the country in a series of well-orchestrated offensives that benefited from Iranian and Hezbollah advice and a surge of fuel, munitions, and spare parts via twice-daily shuttle service operated by Mahan Air,[30] a government-controlled airline used by the IRGC Qods Force to ferry trainers and equipment to war zones.[31] In the same period, an Iranian cargo ship unloaded 180 tons of military equipment in the Red Sea port of al-Salif under tight security.[32]

On September 21, 2023, the Houthis celebrated the nine-year anniversary of their coup with a massive military parade in Sanaa that underlined just how far they have come as a military force.[33] There, they unveiled a new MRBM called the Toophan (Storm), which bears a remarkable similarity to Iran's 1,200-mile-range Ghadr ballistic missile. A never-before-seen Iranian rocket engine in the Ghadr class was also displayed, perhaps to prove that the Houthi missile was not an empty mockup. Then, on October 19—as detailed in figure 1—the Houthis fired four land attack cruise missiles (likely Iranian-designed Quds-class[34]) and fifteen drones (likely Sammad-4 or Waed drones, similar to those Iran provided to Russia[35]). In the current Gaza war, the Houthis have conducted more strikes against Israeli economic infrastructure and shipping than has Hezbollah, and have seemingly suffered no real consequences as a result.[36] This experience could underline for Iran the future potential of Houthi-controlled Yemen as a launchpad for attacks against Israel, the Gulf states, U.S. forces, and global shipping.

Houthi Mass Mobilization Potential

Today, the Houthi movement is overseeing a mass military mobilization in Yemen unprecedented in the country's history, comparable only to Iran's own mass mobilization during the Iran-Iraq War, and perhaps to that following the 2014 fatwa activating Iraq's Popular Mobilization Forces during the counter-IS war. At the aforementioned nine-year-anniversary parade, the Houthi-controlled SABA news agency claimed (and video seemed to show) that around 35,000 uniformed troops participated in the event.[37] To give context, this parade alone included as many troops as the entire Yemeni military in 2001, and the Houthis were able to concentrate this many troops in Sanaa at the same time that they maintained active frontline forces across seven hundred miles of battlefront in Yemen.

How was this achieved? In recent years, the Houthis have developed a sophisticated military human resources system that penetrates almost every neighborhood, village, and household under their control. The system is run by a very senior—currently unidentified—Houthi officer known as the "jihad preparation official," drawing upon a 130,000-man General Mobilization Authority reserve pool modeled on Iran's Basij reserve force. The Houthi military is an ideologically brainwashed force: its "Spiritual Guidance Department"—based on IRGC and Hezbollah precedents—has now been active for almost a decade, and younger Yemeni soldiers were just small children when the Houthis seized Sanaa in 2014. Many likely cannot remember a time before the slogan "Death to America / Death to Israel / Curse the Jews / Victory to Islam." These trends will become more pronounced each year as Yemeni youths increasingly grow up without a memory of the pre-Houthi period. During the current Israel-Hamas war, the Houthis undertook a mass recruitment drive under the banner "Jihad in Palestine," thereafter deploying around 16,000 new volunteers to internal frontlines such as Marib and the Red Sea coast in November 2023.

Implications of a Southern Hezbollah for U.S. Interests

Having achieved much to date, the Houthis still have room to grow. All their accomplishments thus far have been gained under an international blockade and on a shoestring budget. Even now, Iran can smuggle Toophan and Zolfaqar ballistic missiles and Quds cruise missiles right through the increasingly feeble UN inspection effort off Yemen's ports. In the future, after a Saudi-brokered Yemen peace deal, the Houthis may face even weaker inspections, plus reopened flights to and from Iran and Lebanon, and a commanding share of Yemeni government revenues and Saudi aid. As in Lebanon, Iran will probably continue to develop precision-guided drone and missile industries in Houthi-held Yemen. The result will be a secure power projection hub for Iran and its axis of resistance, lodged on the Arabian Peninsula, able to hold hostage global oil supply and Saudi Arabia's Vision 2030 economic plans, and poised to shut the Suez Canal and Israel's southern maritime corridor through the Straits of Tiran.

These outcomes were exuberantly foreseen just three days after the Houthis seized Sanaa in September 2014 by Iranian commentator Mohammad Sadeq al-Husseini, who boasted on Hezbollah's al-Mayadeen television station: "The Bab al-Mandeb Strait and the Strait of Hormuz tighten the noose on the Red Sea and on Israel and the Suez Canal…We in the Axis of Resistance are the new sultans of the Mediterranean and the Gulf. We in Tehran, Damascus, Dahiya [the Hezbollah-held southern area of Beirut], Baghdad, and Sanaa will shape the map of the region. We are the new sultans of the Red Sea as well."[38] These claims would sound ridiculous if they did not accurately reflect the current tightening of Iran's grip on these sea-lanes using advanced conventional weapons and a partner force in Houthi-controlled northwest Yemen. The pincer movement today felt by Israel—generated by a northern and southern Hezbollah—could be felt tomorrow by global shipping in the East Mediterranean, Suez, Straits of Tiran, Red Sea, Bab al-Mandab, and Indian Ocean.

Extended Deterrence Iran Can Afford to Use

While Iran appears hesitant to "spend" the carefully built retaliatory capability of Lebanese Hezbollah in the current conflict, it seems much less risk averse regarding the Houthis. For their part, the Houthis are remarkably confident and they do not seem to fear Israeli, Saudi, or U.S. retaliatory actions. Partly, this is because the Houthis are inured to war after spending almost all of the last twenty years in conflict with domestic enemies and nearly ten fighting Saudi Arabia. Their leadership is well hidden. And they have already weathered American strikes without the sky falling on them: in October 2016, as noted, the Houthis fired antishipping missiles at the USS *Mason*, a guided missile destroyer, triggering very limited U.S. retaliation against Houthi naval radar posts. Houthi actions since October 19, 2023, demonstrate that they have no fear of U.S. or Israeli counteractions.

Recent strikes by the Houthis on Israel will undoubtedly further boost their sense of impunity and growing ambition. The aforementioned Iranian pundit, Mohammad Sadeq al-Hosseini, crowed: "Abdal-Malik al-Houthi is now the boss in Yemen, and he will become the boss of the Arabian Peninsula."[39] This boundless confidence may stem from the awareness that a Zaidi imam has run northern Yemen (and sometimes parts of southwest Saudi Arabia) for 897 of the last 1,126 years. The Houthis talk about reclaiming Saudi Arabia's Red Sea coast, which includes the two holiest cities in Islam—Mecca and Medina—and speak of the al-Saud as "a tribe on the verge of extinction."[40] Even as a Houthi militarily venture northward into Saudi Arabia may seem unthinkable, the threat from Yemen is precisely why Riyadh built its major west coast military base at Khamis Mushait decades ago. It was also unthinkable that the Islamic State would shatter six Iraqi military divisions and seize a third of Iraq in 2014, or indeed that the Houthis would seize Yemen's most populated cities the same year—yet these events also occurred.

The addition of a confident, risk-acceptant southern Hezbollah with useful standoff distance from Israel could affect Iran's deterrent calculations in a number

of ways. First, the IRGC may have a more resilient, less vulnerable option than Lebanese Hezbollah for use in future crises. Compared to less reliable partners such as Syria's Assad regime or Iraq's fractious militias, the Houthis are dedicated, seemingly secure, and very willing to sacrifice for the axis of resistance. Second, if Iran has only one Hezbollah, it cannot afford to risk its destruction in an Iran-initiated "war of choice" with Israel, but if it has two Hezbollahs, that calculation may no longer hold. Third, and least surely, an even stronger conventional deterrent triad—covering Hormuz (Iran), the Red Sea and Indian Ocean (Yemen), and the Mediterranean Sea (Lebanon)—could shape Iranian calculations about whether developing and declaring their ownership of nuclear weapons ownership is necessary. At the very least, Iran might be emboldened to use its leverage in these three choke points as an asset during future military adventures or nuclear crises.

A final analytic exercise is to imagine how a strengthened Houthi movement might shape great power competition at the nexus of global sea-lanes. There is a reason why Yemen's Aden became, for a time, the world's busiest port after the Suez Canal opened, and a reason why Osama bin Laden considered it a better base than Afghanistan from which to run global terrorist plots. In great power competition, Yemen may fulfill what remain the three top considerations: location, location, location. In the old Cold War, Yemen was developed as a bomber base by the Soviets, and its large island—Socotra—attained mythical status as a place where each superpower supposedly jockeyed for basing rights. Today, with Iran cozying up to Russia and courting China, these ideas are not far-fetched at all. Though the Houthis are suspicious of any external power, Iran might one day convince them to allow Yemen to serve as a powerful forward-basing location for China or Russia, overlooking the Suez Canal, the Indian Ocean, the Red Sea, the Straits of Tiran, and a variety of U.S. bases and logistical nodes. The additional strategic depth earned by displacing U.S. bases westward away from Iran—to Jordan, Oman, and western Saudi Arabia—could be effortlessly outflanked by Yemen.

Issues and Options for U.S. Policy

What all this discussion points to is that Yemen matters to U.S. policy, and so do the Houthis as a fast-growing regional threat. In the understandable desire to end the war in Yemen, Washington has arguably overlooked a disconcerting development in the regional security affairs of the Middle East; namely, the emergence of a powerful new military actor in Yemen's Houthi movement, which might be thought of as a kind of non-nuclear North Korea—an insular, aggressive, well-armed player hostile to the United States and sitting on key geography.

Ending the Yemen war should remain a central goal for U.S. policymakers, not just to stop a hugely destructive conflict but also to remove a major bilateral complication at a time when Washington and Riyadh have been discussing the potential conditions for an Israeli normalization deal and deeper U.S.-Saudi defense commitments. The United States is therefore tied to any outcome that brings the current war in Yemen to a formal end, but U.S. officials should be clear-eyed that peace is unlikely to hold and that a sequel conflict is highly likely. The Houthis are an expansionist power, with deep animosity toward Saudi Arabia, Israel, and the United States. Furthermore, America should recognize that Iran and the Houthis share a strong, deep-rooted alliance underpinned by tight ideological affinity and geopolitical alignment. They cannot be separated.

Pragmatically, the United States should commit to the long-term containment and hopefully diminishment of Houthi military power. Here, America should draw upon its own history to conceptualize this containment process. If the deeply flawed Saudi-led military campaign since 2015 achieved a Korean War–type result—allowing Yemen's south to avoid being overrun by the north—then the logic follows that the non-Houthi area should be supported, militarily and economically, much as an initially nondemocratic South Korea was supported until it eventually became defensively sound, economically

successful, and—over time—more democratic. Yemen does not have to be formally reunified, much as Korea has not been reunified, but the anti-U.S. forces in the north must not be allowed to snuff out their opposition in the south and east. In addition to ensuring a fair peace deal in Yemen, the United States must take concrete steps to enforce the 2015 UN arms embargo,[41] and to prevent destabilizing shifts in the military balance of power that could restart the war. History supports the finding that the Houthis will opportunistically seize military openings, so they must not be tempted with such opportunities.

Military Support to Non-Houthi Areas of Yemen

The first priority is thus to ensure that the Houthis cannot overrun any more areas of Yemen. The oil- and gas-rich governorate of Marib has been a consistent—almost pathological—focus for the Houthi military since the current war began in 2015.[42] By the end of 2021, the Houthis had advanced to within ten miles of Marib city, the closest since their initial lunge to take the city in 2015. A Saudi- and UAE-backed counteroffensive by the non-Houthi Yemeni factions—which are now gathered under the Saudi-backed Presidential Leadership Council (PLC)—succeeded in driving the Houthis back at the last moment, undoing two years of creeping Houthi advances and preventing a war-winning Houthi victory at Marib.[43]

Now, the Houthis have crept forward again to within twenty miles of Marib under the cover of the UN-mediated partial ceasefire in effect since April 2022. Marib simply must not fall to the Houthis, or else they will control almost all Yemen's hydrocarbon assets and would have very little incentive to stick to any internationally brokered peace deal. Other strategic areas like Aden and the Bab al-Mandab Strait, recaptured from the Houthis by UAE-Yemeni forces in 2015–16, must also be held due to the even more serious threat Houthi control of these areas would pose to global shipping and to the viability of non-Houthi enclaves in Yemen.

When the Houthis last tried to overrun the whole country in 2015, the U.S. reaction was to tepidly support an indigenous and regional (i.e., Yemeni and pan-Arab) military response—Operation Decisive Storm and its successors, which collectively make up the current Yemen war. Very quickly, U.S. political leaders decided this was not, in fact, such a good idea and withdrew even the initial weak U.S. diplomatic and logistical support. U.S. politicians did not want the Houthis to overrun all of Yemen, but nor did they want the Saudi-led coalition to fight a brutal war to prevent that overrun, or for the United States to become more directly involved. This dichotomous mess is clearly not a model for future policy in Yemen, no matter how politically unpopular U.S. military involvement may be in the Middle East at any given time. The right model is U.S.-assisted prevention and deterrence so that the Houthis do not attack again and neither regional players nor the United States are drawn into another conflict.

As with North Korea, militarily deterring and containing the Houthis will be a defensive mission, intended to ensure that they do not scent weakness or opportunity, and that they know they would likely fail and be punished heavily if they attacked again. The United States would not be alone in assisting the PLC factions to achieve baseline defensive resilience—which may not be a particularly high bar because Houthi offensives have historically been quite easy to block if the defenses are alerted, entrenched, and provided with fire support. Both Saudi Arabia and the United Arab Emirates retain direct ties to different PLC players and are already arming and training them, most importantly with small numbers of long-range artillery systems that have previously proved decisive in blunting Houthi advances.[44] Though the United States and the Gulf states should be careful not to create imbalances that could encourage the PLC factions to attack the Houthis—or other PLC factions!—the Houthis should be made to feel uncertain that they can hold all their many frontlines against the PLC. This will counteract a key failure of the UN-brokered December 2018 Stockholm Agreement—namely, the encouragement it gave to the Houthis to safely transfer commanders and forces from the Hodeida front to Marib, knowing

the international community would prevent anti-Houthi action on the lightly held Red Sea coast.

In early 2022, the Houthis saw how easily they could be evicted from terrain when the Saudi- and UAE-backed forces worked in unison and with the benefit of advanced firepower—in that case, from Saudi and UAE strike aircraft. This is the broad formula the United States needs to support whenever the Houthis consider expansionist efforts. The United States needs to use its intelligence systems to alert the PLC members and their Gulf backers if the Houthis are detected planning a new offensive. Then America should use its good offices to ensure timely military coordination within the PLC-Saudi-UAE coalition, aided by U.S. intelligence, planning, and logistical support. In a miniature version of the old Reforger exercises, which enacted transatlantic U.S. reinforcement of NATO, the PLC-Saudi-UAE coalition—aided by U.S. noncombat forces—might exercise rapid switching of forces between sub-theaters in Yemen, sometimes to signal awareness of preparations for Houthi offensives and to underline PLC readiness to blunt such offensives.

The U.S. military would not need to play a combat role in deterring Houthi attacks, but would instead support intelligence, planning, and logistics, as it has done in the past. The United States has directly resupplied Yemeni military forces by air as recently as 2012, when Yemeni army units were provided with air-dropped ammunition to sustain them when surrounded by al-Qaeda forces overrunning Abyan governorate in the chaotic aftermath of the Arab Spring. Likewise, in 2021, the United States provided Arab partners with timely targeting intelligence to allow them to strike Houthi MRBM launchers after they fired missiles at Gulf cities. The United States should also expand access to its military academies for PLC officers through International Military Education and Training grants.

Reestablishing Deterrence

The Israel-Hamas war has underlined the lack of a U.S. answer for deterring the Houthis, an unsustainable situation for a superpower that prides itself on being the guarantor of global sea-lanes. In the current war, the Houthis have not been militarily deterred by either Israel or the United States from taking destabilizing actions that are forcing global traffic to avoid the Suez Canal.[45] The October 2016 U.S. strikes on Houthi coastal radars seem not to have impressed the Houthis, leaving them today willing to shoot at—or at least through—groups of U.S. Navy surface vessels and also to destroy valuable U.S. drones. The Houthis have demonstrated, particularly since 2021, a sense of complete freedom to use newly available Iran-provided drones and other capabilities to strike PLC-controlled oil targets, Yemeni political leaders—including the entire Yemeni cabinet in one attack[46]—and international shipping. Whether in their strikes on Saudi and UAE cities, Saudi economic sites and airports, or more recently in Israel, the Houthis have demonstrated a wanton disregard for collateral damage. It is only a matter of time before Houthi strikes result in a mass-casualty event or a massive oil spill or fire. (For example, when rockets hit Saudi Arabia's Abha airport on February 10, 2021, they set fire to a civilian airliner, luckily without loss of life.[47])

The only surefire way to avoid these potential disasters is by convincing the Houthis to stop their missile, drone, and rocket attacks. That may require a painful reimposition of basic deterrence. Despite having a high pain threshold after decades of war, the Houthis do seem to be sensitive about certain targets, namely: their leaders; drone and missile storage sites; irreplaceable helicopters and fixed-wing aircraft; Iranian and Hezbollah specialists and advisors; liquid-fuel systems and storage; and the antishipping capabilities they have built, including "mother ships" and "spy dhows" operating far from Houthi-held areas. Covert action—possibly in collaboration with Israel or Saudi Arabia or both[48]—might be the most effective way to operate against the proud Houthi leadership, who will otherwise use attacks to exploit the traditionally strong reaction in Yemen toward foreign "invaders." The United States should quietly aid interested parties such as Israel to conduct cleaner and more effective defensive strikes further "upstream," before missiles and drones are built, deployed, or launched, and indeed to help PLC

groups kill Houthi leaders if the Houthis themselves continue to assassinate senior PLC officers using drones.

In certain cases, the United States should also extend its deterrent support to key economic initiatives inside Yemen, notably the Yemen Liquefied Natural Gas (YLNG) project in Marib and Shabwa, a Yemeni-U.S.-French-Japanese joint venture with the potential to add well over a billion dollars to the miniscule Yemeni budget—which, as alluded to earlier, currently records annual revenues of just $2–3 billion by necessarily approximate wartime estimates. A restart of this gas project—which is located in PLC territories—has been prevented thus far by Houthi military threats, and its eventual achievement should be underwritten with strong U.S., French, and Japanese assurances that threats or attacks toward YLNG could result in broad international sanctioning of the Houthi leadership figures (see below). U.S. security assistance to the PLC might also include critical infrastructure resilience planning and modest funding support at key oil and gas nodes, with a view to making such facilities less vulnerable to Houthi intimidation efforts.

Isolating the Houthis, Connecting the PLC

The existing UN arms embargo on the Houthis—and U.S., UN, and European Union sanctions on Iran's military exports—should be vigorously enforced. The Houthis are increasing their missile salvos against Israel because they have no fear that their resupply route will be cut. Iran smuggled MRBMs capable of reaching Israel into Yemen despite the UN inspections regime and U.S.-led maritime patrolling. More U.S. and partner resources need to be focused on interdicting Iran-provided guidance systems, engines, and large liquid-fuel tanks, particularly when they are delivered via smaller ships and via transshipment points on the Horn of Africa. The United States likewise needs to work with international partners to tighten the intelligence-driven arms embargo on Yemen, with a focus on not only Houthi-held ports but also other ports in Yemen and Oman through which missile, rocket, and drone components flow. These include dual-use materials such as fiberglass, which is used in drone and missile bodies. All aircraft that land in Houthi-held areas should be inspected, since even small aircraft can carry large cargos of specialized components. The United States, moreover, should support the Gulf states in seeking ongoing prevention of direct air freight and passenger flights between Yemen and the following states: Lebanon, Iran, Syria, and Iraq.

The Israel-Hamas war has quietly focused Red Sea players—Saudi Arabia, Egypt, Jordan, and Israel—on greater cooperation against Houthi MRBM, cruise missile, and drone capabilities, as well as attacks on shipping. This is fertile ground for the creation of what former undersecretary of state David Schenker called "a multilateral Red Sea security mechanism to interdict illicit weapons shipments, stop human and other trafficking, and prevent the harassment of shipping, including by laying mines, at the southern end of the Red Sea."[49] As Schenker—currently a Washington Institute expert—concluded, such a force could be built onto the existing counterpiracy mission known as Combined Task Force 151. Given the growing threat posed by the emerging "southern Hezbollah" to Saudi Arabia, Egypt, Israel, and Jordan, Washington should also quietly convene a closed-door meeting of this Red Sea security quartet and develop medium-term plans for southward-facing defensive cooperation.[50] If the current Gaza war has seen any bright spots, one is the highly effective effort to counter Houthi missiles and drones, led by the United States but leveraging the assets of both Saudi Arabia and Israel.

Recalling the case of South Korea, the non-Houthi areas of Yemen need to be strengthened economically if they are to survive. While this effort would likely be led by Saudi Arabia and the UAE, there would be value in a U.S. role. First, the United States can at times help deconflict the separate—and sometimes competing—efforts of the two most powerful Gulf states. Second, Washington can lobby for additional help from international financial institutions to help make Yemen's non-Houthi areas

into a more successful model than the unreformed Houthi-held territories, thus reducing Houthi resources and increasing the potential for internal challenges to the movement's despotic rule. Nor should the United States shy away from the idea of a divided-country solution in which Yemen reverts to two or more entities, albeit with a number of highly autonomous PLC-governed areas held loosely together in matters of self-defense. Yemen has only fleetingly existed as one state, and even a monolithic southern Yemen is an artificial and unconvincing edifice.[51] A confederation of PLC statelets—not dissimilar to the old federations of southern Arabia—should be supported by the United States if that is how PLC factions wish to self-organize and if key Gulf states back the idea. A little economic aid in Yemen goes a long way, especially in the southern port cities, where genuine potential exists for logistics and trade development if Houthi drones can be kept away.

A final consideration for U.S. policy is whether to redesignate the Houthi Ansar Allah as a Foreign Terrorist Organization under Executive Order 13224, the post-9/11 formula by which groups such as the Taliban have been sanctioned. This was the designation briefly applied to the Houthis by the Trump administration, only to be revoked by the Biden administration shortly after entering office. The rationale for revocation was that designation as an FTO under counterterrorism sanctions would make it difficult to ensure humanitarian carve-outs during a moment of extreme humanitarian crisis. Even if that crisis has subsided somewhat, which is questionable, sanctions experts—even those with a negative view of the Houthis[52]—still argue that redesignation may not be the optimal way to use sanctions.

Breaking up a designation into smaller packages against individual leaders, agencies, and businesses might be more effective in linking a campaign of sanctions to individual negative actions, which can confer greater legitimacy and perhaps effect some change in behavior—though this will be especially difficult with the Houthis. One option would be designating various leaders of Ansar Allah under Executive Order 13611, the authority used for blocking the property of individuals who threaten "the peace, security, or stability of Yemen." Under Executive Order 13224, individual Houthi entities can also be sanctioned through "derivative designations" that tie their activities to previously designated entities such as Iran's IRGC Qods Force or Lebanese Hezbollah.[53] And Houthi leaders and entities might fruitfully be sanctioned for nonterrorism offenses, such as corruption or human rights violations, which could prove more damaging to the Houthis in the international, U.S. congressional, and domestic Yemeni environments. Thus, Houthi leaders might be designated individually and in small groups for a wider range of violations, from missile and drone proliferation to "jihad preparation" efforts, and from the imposition of draconian social codes[54] to gross human rights abuses[55] and the mobilization of child soldiers.[56] If the Houthi movement is redesignated as an FTO, possibly most likely under a Republican-led government in 2025, the layers of parallel individual sanctions just outlined will also be useful to draw attention to nonterrorism aspect of Houthi misrule.

Above all, the principle guiding U.S. policy should be a clear-cut effort to weaken the Houthi authorities in northern Yemen, ideally until they collapse, which is in the best interest of most Yemenis, most Arabs, and most international players who seek to bolster the future stability of the Middle East. The moral imperative of ending the post-2015 Yemen war has obscured the underlying reality that a profoundly anti-U.S. and anti-Israel armed group has seized a large swath of Yemen on the strategic southern tip of the Arabian Peninsula. The U.S. government should not welcome the emergence of a new, aggressive Hezbollah-type movement that attacks the United States and its partners, Arab or Israeli. Nor should Washington be content to leave the Houthis in control of millions of innocent people or emboldened to expand their domination. The still-free peoples of Yemen must be supported by U.S. policy to remain outside of Houthi control, with gradually improving governance and economic prospects that show the free areas outperforming Houthi-dominated Yemen. ❖

NOTES

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