The Houthis are on the March

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Radio Albion
2026

For years, the Houthis were seen as a Yemeni problem – a rebel group that seized a capital, fought a Saudi-led coalition, and occasionally fired missiles across a border. That picture is now dangerously out of date. Over the past two years, the Houthis have quietly built a second base of operations inside Iraq, and this is not a loose political friendship. It is a military merger that has made them stronger than they have ever been.

The first thing to understand is that this is no longer a relationship built on phone calls and shared statements. In 2024, the Houthi leadership spoke openly about a joint operations room with Iraqi factions. Since then, that room has become a working command center. When drones struck Saudi oil facilities in July 2026, regional officials confirmed that Houthi emissaries were working inside an operations room run by Iraqi militias, helping to plan and execute a two-day swarm attack. A United Nations expert panel later found that the Houthis had established joint operations rooms not only in Iraq but also in Lebanon,

with Iranian support. This is not coordination on the margins. It is the Houthis sitting at the center of a regional command structure.

1

Geography is what makes Iraq so valuable to them. Yemen is a narrow battlefield. Iraq is wide open. The country shares a border with Saudi Arabia that stretches more than 800 kilometers, and large parts of it are desert that no one can properly police. A drone launched from Iraqi soil reaches Saudi oil infrastructure far faster than one fired from Yemen. It flies from a direction Riyadh has never had to defend. The Houthis have exploited this by moving their specialists and equipment into Iraqi territory, where they can threaten the kingdom from a second front that Saudi air defenses were not built to cover.

The physical heart of this new network is Jurf al-Sakhar, a fortified zone in Babil province, south of Baghdad. The area is controlled by Kataib Hezbollah, the most organized and heavily armed of Iraq's pro-Iranian factions. According to multiple intelligence sources, the Houthis have established a secret operations headquarters inside this closed military zone, protected by Kataib Hezbollah and supervised by an officer from Iran's Revolutionary Guard. The site was deliberately chosen for its isolation and its access to transport routes, and it

replaced an earlier Houthi office in Baghdad that was considered too exposed. From Jurf al-Sakhar, the Houthis are not just hiding. They are running a war.

What they have built there is more than a base. It is a school. Houthi drone experts -men who spent years learning how to build and fly explosive drones in Yemen's war- are now embedded with Iraqi factions, training personnel and transferring technical knowledge. This is a two-way street: the Houthis gain access to Iraqi facilities and manpower, while Iraqi militias learn the skills that made the Houthis such a persistent threat to shipping and energy infrastructure.
2

The money behind this operation is just as important as the weapons. Iraqi factions are estimated to channel roughly $100 million a year to the Houthis, often through informal oil shipments and donations collected at religious sites. The Houthis have also opened bank accounts in Iraq to bypass financial sanctions, and they have built a network of companies and intermediaries operating through Oman and Iraq to trade Iranian petroleum and conceal the destination of funds. The US Treasury estimates that illicit petroleum sales generate more than $2 billion annually for the group.

The logistics are just as sophisticated. Houthi personnel

move under the protection of powerful Iraqi factions, using their security networks to transfer people and equipment between provinces. Supply routes link Syria, Iraq, and Yemen, allowing weapons and technical teams to circulate across the region. Iraq has also become a manufacturing platform. Workshops linked to the "Popular Mobilization Forces" have produced long-range drones similar to the models the Houthis use, and some of the aircraft and missiles seen in Houthi hands have come out of Iraqi factories. The PMF has even provided the Houthis with heavily subsidized Iraqi fuel, which is shipped from Basra to Hodeida in violation of an international embargo.

All of this is supervised from above. An Iranian Revolutionary Guard officer known as Haji Hamed, assigned to Iraq, directly oversees part of the Houthi activity, according to intelligence sources. Iraqi factions describe cells that bypass their original commanders and report directly to him, and a reactivated coordination channel links Iraqi operatives with the Houthis under his supervision. Apparently, this is not a spontaneous alliance of convenience. It is a deliberately designed structure, built by Iran, to give the Houthis something Yemen alone could never provide: strategic depth.

The recent result is a Houthi movement that is harder to deter, harder to disarm, and harder to contain. When an

attack originates from Iraqi soil using Houthi technology and mixed crews, responsibility becomes deliberately blurred. Striking back in Yemen leaves the Iraqi infrastructure untouched; striking inside Iraq carries steep political and diplomatic costs. The Houthis have turned Iraq into a shield and a launch pad at the same time. They are no longer a national insurgency with regional ambitions. They are a transnational security problem with "multiple homes", and that is precisely what makes them stronger than ever before.

3

Yemen, land of so much suffering, is becoming ever more distempered. The official government, its status assured only because of such sponsors as the Kingdom of Saudi Arabia, is teetering. The appetite on the part of Riyadh to keep up the fight against the seemingly imperishable Iranian-backed Houthis is diminishing. What is interesting on this score is that interest in Washington for a military response has barely registered. In September, when Saudi Crown Prince Mohammed bin Salman urged US President Donald Trump to authorize strikes on Houthi positions, he was rebuffed.

Despite a counterattack in October intended to seize west coast territory taken by the Houthis in September, the Yemeni government announced on November 15 that it

was withdrawing from the environs of the Bab el-Mandeb Strait, another indispensable global shipping route that became even more prominent with the closure of the Strait of Hormuz by Iran in its battle with the United States and Israel. The Bab el-Mandeb Strait, linking Europe to Asia via the Red Sea and Suez Canal, remains important as a shipping passage. According to a satellite estimate by IMF PortWatch, as of November 11, it had 26 transits a day, a figure 33.8 percent down from the same week in 2025.

The statement from the Southern Armed Forces barely concealed the desperation.

> ‘In light of the latest developments on the fronts, the military build-ups, and the threats targeting the capital Aden and neighboring governorates and given the responsibilities and field and security priorities this phase imposes, the Southern Armed Forces announce that they are carrying out a repositioning of their forces from Dhubab Airport and the Bal al-Mandab area in western Taiz Governorate.’

On November 16, an aggressive advance by the Houthis along the southern coastline into Khor Omairh was reported, placing them within a hundred kilometers west of Aden, which has served as the government’s bastion of

power since the 2014 capture of Sanaa by the rebels. This also placed them within 25 kilometers of government lines at Qawah. A report noted by Dawn claimed that the Houthis had made even more impressive progress, advancing to an area about 60 kilometers from Aden, situated around the highlands island of the coastal plain bordering Taiz and the southern governorate of Lahj.

4

Taiz itself, encircled by the Houthis in October, continues to be besieged, with Colonel Majid Abdullah al-Nuzaili, spokesperson for the Yemeni Armed Forces, proffering an image of stoic resistance in the face of precipitous decline. The position of the Southern Forces on breaking the siege, he claimed, “represents a patriotic stance at a highly sensitive stage, considering the protection of the capital Aden and the breaking of the siege of Taiz to be a national and moral responsibility to stop the threat of violations by the terrorist Houthi militia.” Al-Nuzaili is certainly one to keep up appearances, having announced the launch of 906 operations on November 15 that left 201 Houthis dead and wounded, followed by 661 operations the next day that inflicted 173 Houthi casualties.

Houthi progress has not been stalled by some 5,183 Saudi airstrikes allegedly launched against rebel positions since

July. If anything, the resolve of the militia is proving formidably steely. Saudi territory has also been harried by missiles and drone strikes, becoming so common as to be daily fact since November 7. The increased frequency of such assaults took place after air strikes by the Saudi-led Coalition to Restore Legitimacy in Yemen on a Taiz Market on November 6 and Bani Hushaysh in Sanaa on November 7. Thirty died in the Taiz Market strike; forty in Bani Hushaysh. Houthi drone strikes have since taken place against oil facilities at Yanbu, Khamis Mushait Air Base and an Aramco facility in Riyadh. Cruise missiles were directed at King Khalid International Airport. On November 16, two Houthi-launched drones were intercepted and destroyed in the Makkah and Riyadh regions. A third was destroyed over the Riyadh region the next day.

The over a decade old conflict between the respective claimants to Yemen's control and sovereignty continues to cause death, injuries and displacement to civilians in a country hideously impoverished and facing a humanitarian crisis of staggering proportion. An OCHA (United Nations Office for the Coordination of Humanitarian Affairs) report covering August 1 to November 10 this year found that 329,117 people (54,846 households) had suffered displacement.

In a bureaucratic spasm, cosmetic changes have been made on the Saudi side of the conflict. When morale needs to be restored, it becomes fitting to, if not execute a general then relieve him of command. Lieutenant General Fahd bin Hamad Al-Salman accordingly suffered an ignominious relief of command for failing to hold the front, with a royal decree naming him “adviser for military affairs to the minister of defense.” Saudi Arabia’s Chief of General Staff General Fayyad bin Hamed bin Ruqad al-Ruwaili is the hurried replacement.

The sense of an ending among the Coalition forces, however, is hard to stem. The motley assembly, including the Southern Transitional Council (STC) leader Aidarous al-Zubaidi, detect the rank smell of incompetence and lack of direction from Riyadh. To muddy matters, Al-Zubaidi is backed by the United Arab Emirates, and remains in Abu Dhabi, his return to southern Yemen barred by Riyadh. (This is less a coalition of allies than an assembly of warring, disagreeable chieftains.) Amr al-Bidh, a spokesperson for al-Zubaidi, insists that: “STC forces retain a credible capability on the ground. But we need practical and political support from the region to counter the Houthis and create the basis for a negotiated settlement, one in which the pathway towards southern independence is fully recognized.”

That credibility is being sorely tested, with the terms of any settlement being increasingly set by the military gains of the Houthis. As this development unfolds, they are being egged on by Tehran as it continues to mock an outmaneuvered and outplayed Trump administration, one that did so much to encourage a widening conflict in the Middle East.