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Analysis

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Cover photo: Houthi supporters march in Sana'a for the 'Day of Wilayah' on August 8, 2020 // Sana'a Center photo by Asem Al-Posi.



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A senior Houthi delegation arrived in Riyadh on September 14, the first such trip since the outset of the conflict. Bilateral Saudi-Houthi talks began in earnest after a failure to extend a UN-sanctioned truce last year and accelerated after a Beijing-brokered détente between Saudi Arabia and Iran in the spring. Talks appeared to stall over the summer, but the visit suggests progress on a deal could be shortly forthcoming.

The precise details of the negotiations have not been made public. The Saudis are looking to wind down their involvement in the war, fueling concerns that they will abandon the internationally recognized government and ignore the concerns and priorities of other Yemeni parties in their haste to leave, leading to further instability. But a deal could also provide a measure of economic and humanitarian relief for Yemen's beleaguered populace, which has suffered for nearly a decade in increasingly dire circumstances.

Sana'a Center experts Maged al-Madhaji, Maysaa Shuja al-Deen, Hussam Radman, Abdulghani al-Iryani, and Thomas Juneau react to the developments in the Saudi-Houthi talks, and look ahead to what they might mean for the future of the conflict in Yemen.

## Saudi-Houthi Negotiations Carry Opportunities and Risks

By Maged al-Madhaji

The Houthis have been remarkably successful in making settlements that serve their interests, while giving little in return. This has been the norm of peace negotiations in Yemen, with the international community's earlier haste and Saudi Arabia's current drive to appease creating suitable ground for the group to extract significant benefits from talks in exchange for minimal concessions.

Theirs is a long-term approach, which accumulates partial gains without making concessions on core issues, a tactic likely learned from the Iranians. In as much as this official visit by a Houthi delegation represents a significant breakthrough and a rare opportunity to push forward peace talks, it can also be viewed as a settlement between the powerful, which excludes the vast majority of Yemenis. As Saudi Arabia cozies up to its former enemy by offering money and concessions, the Houthis will impose a victor's peace at home. Again, they have had to give up very little, merely agreeing not to launch more drones and missiles into the Saudi kingdom – Riyadh does not want its newly purchased European football stars disturbed by the sound of explosions.

This new, high-speed peace track kicked off against the backdrop of the Beijing-brokered détente between Riyadh and Tehran, following a stalemate in the UN-sanctioned process last October. The talks reveal the extent of Iran's leverage over the Houthis, and that influence likely accounts for the group's current responsiveness. If a breakthrough ends the war in Yemen, Beijing will be credited, and receive whatever political dividends result. This would be uncomfortable for Washington, and pave the way for a new role for China in a region where it has historically wielded little influence. The US cannot publicly object to developments in the peace process, but it will certainly be concerned about a political settlement that builds on a foundation laid by China.

## No Guarantees

The Houthi delegation's visit to Riyadh provides the group with the recognition and parity that it so desperately seeks, and Houthi rhetoric has been accordingly positive in response. But the visit poses as many questions as it answers. What will the Saudi role be now? In a statement from its Ministry of Foreign Affairs, the kingdom was keen to emphasize its role as a mediator, and confirmed its partnership with the Sultanate of Oman in managing the mediation process. The Houthis did not publicly object to this characterization, as they have in the past, and their silence may be a tacit sign of concession on the point, at least for the time being.

The visit comes at a time when the Houthi group is relatively vulnerable, facing increasing economic pressure at home. The cessation in hostilities since the signing of last year's truce paved the way for the public to demand salaries that had been suspended on the pretext of the war. Increasing political criticism and public protests over the issue have become a real concern for the group. This coincides with Iranian and Omani pressure to respond positively to talks and temper their maximalist demands. It appears the government's oil and gas revenues will no longer be linked to a breakthrough in the payment of public salaries. Saudi Arabia is now expected to pay salaries to all current public employees in Yemen for a period of six months, while the UN will negotiate between the parties to discuss the issue of future revenues to fund salary payments, including by restarting oil and gas exports. If the Houthis agree to this, and indications are that they will, it would represent significant movement in the talks.

Certainly, a number of worrying challenges remain, the most important of which is that there is no guarantee of a political dialogue between Yemeni parties to the conflict. The possibility of renewed fighting remains, particularly once the Houthis ensure salaries are paid for long enough to silence public criticism and for it to reorganize militarily. It could again venture to take new territories, including oil-rich Marib, the target of its massive and costly 2020-2021 offensive.

The Stockholm Agreement of 2018, which the international community has failed to defend, provides an example of the Houthis' strategy of making interim concessions in order to circumvent an internal crisis, and subsequently refusing to implement the agreed provisions. This will likely happen again unless negotiations on economic issues and resources coincide with political talks. The latter will take a long time, but needs to be started now – any delay will give room for the Houthis to abort the process once they have their money.

The UAE and its allies remain the only parties that can disrupt the process, as the Saudi-backed President Leadership Council (PLC) and other Yemeni actors remain marginalized. Divisions within the PLC have undermined its role, and Saudi Arabia has been shameless in inviting the Houthis to negotiate without involving the government. With the erosion of the political power of the Islah party, the Emirati-backed Southern Transitional Council (STC) is the only group capable of rejecting the concessions made by the Saudis. But a Saudi-Emirati split carries its own grave risks for peace in Yemen.

## What Will Peace Do to the Houthis?

By Maysaa Shuja El-Deen

It is no exaggeration to say that the Houthi group emerged from the womb of war. The group was formed, and its structure developed, during the Sa'ada Wars (2004–2010). Soon after, it engaged in the popular uprising of 2011 and later in the National Dialogue Conference (NDC), but never stopped its military operations north of Sana'a – whether against Salafis in Dammaj or in its expansion east toward Al-Jawf and Hajjah. The Houthis escalated their fighting as the NDC concluded in early 2014, advancing on the capital, which fell on September 21. They continued to expand until they reached Aden, when the wider war broke out with the announcement of Saudi military intervention on March 26, 2015.

Conflict has formed the Houthi group, shaping its apprehensive and suspicious nature and military structure. For 19 years, it has never stopped operations. All its achievements have been contingent on military success – peace may be the greatest challenge the group has faced since its inception.

Since the agreement of a truce in April 2022, the group has faced growing public outrage over corruption and the collection of huge sums of money through taxes, levies, zakat, and khums, with no services or salaries in return. With peace, the group loses its ability to cast blame to obscure its failures. The war and the militarily imposed isolation of northern Yemen were ready-made excuses to justify deteriorating living conditions. From their founding, the Houthis adopted narratives of victimhood, as a group persecuted by the regime of former president Ali Abdullah Saleh. Later, from 2011 until their takeover of Sana'a, the group adopted a revolutionary discourse that fed on grievances over corruption. When the Saudi-led coalition intervened, they assumed authority under the pretext of defending Yemen against foreign aggression. This line of reasoning was very effective, especially in areas that were heavily bombarded by Saudi airstrikes.

The Houthis have now established their own state, where they are putting their ideology into practice. Nothing is likely to convince them to compromise and share power. But as their incompetence, corruption, and poor governance persist, the group will face a new crisis of legitimacy. The Houthis could struggle to maintain cohesion amid growing disputes between members over wealth and influence. One wing of the group supports rapprochement with Saudi Arabia due to the projected economic benefits, while another is ideologically influenced by Iran and views conciliation with deep apprehension. Finally, a split may occur between those who served in the Houthi authorities over the course of the war, and made a fortune doing so, and those who have recently returned from the frontlines, now jealous of these ill-gotten gains. Attempts to restrain the group through peace talks could backfire, as peace itself represents an existential threat to their existence, and could provoke further violence.

The Houthis have two options: reform themselves to cope with peace, or initiate further conflict. The former seems unlikely for an ideological group that has reaped its gains by force of arms rather than political or managerial competence. Reform would mean abandoning the spheres of influence and clientele networks on which they built their power and bought the loyalty of their followers, a potentially dangerous move in a hostile social environment. But power and authority have changed the behavior of ideological groups in the past, and could instill a new measure of political pragmatism.

The other option is for the Houthis to renew fighting in order to mobilize support, maintain group cohesion, and curb popular opposition, controlling society by triggering a sense of insecurity and building on existing fear. If fighting resumes, an escalation of Al-Qaeda and Islamic State activities in Yemen cannot be ruled out. In turn, increased activity by either group could provide the excuse the Houthis need to fully restart their military machine and operate in familiar circumstances. They have long mastered the art of war, but as yet have failed to successfully bear the responsibilities of peace.

## A Houthi-Saudi Deal Could Spell Further Escalation in Southern Yemen

By [Hussam Radman](#)

While the Houthis' path to a deal with Riyadh now appears open, the Saudis' role in southern Yemen has become much more difficult. In January 2023, Saudi Ambassador to Yemen Mohammed al-Jaber ramped up direct talks with the Houthis in Muscat and arranged a secret visit to Sana'a. In April, the Saudis followed with a public visit to Sana'a that received significant media coverage. But neither resulted in any tangible political progress. They did, however, provoke the STC, which announced a major restructuring, recruiting two key members of the PLC – Faraj al-Bahsani and Abdulrahman al-Mahrami. The move was understood as a preemptive measure in case Riyadh presented the PLC with a political settlement as a fait accompli.

Concurrently, the STC stepped up its efforts to extend its influence in Hadramawt – Yemen's oil-rich eastern governorate. In response, Riyadh sponsored a political and tribal movement that resulted in the announcement of a new Hadramawt National Council. While the council has done little, its existence confirms Riyadh's preference to isolate the STC politically. Escalation in the south continued from May into July, when the Saudi-Houthi talks went on hiatus. It also became clear that the Hadramawt National Council was a Saudi defensive measure, not a strategic project to reshape southern Yemen. Accordingly, the two sides opted for de-escalation. Aiderous al-Zubaidi returned to Aden and engaged in his role as PLC's vice chairman.

But this fragile detente is now threatened by the announcement of the Houthi visit to Riyadh. The Saudis' excessive focus on pleasing the Houthis, and the marginalization of their own allies in government, has reinforced the STC's conviction that Riyadh respects difficult adversaries more than committed friends. In its view, the best way to ensure that the STC is a key player in any upcoming negotiations is to return to its policy of creating

facts on the ground, even if it means being branded a rogue entity by Saudi Arabia and its Western allies. In the STC's thinking, there is little point in obtaining legal legitimacy, or joining the official institutions of the internationally recognized government, if they are going to be politically marginalized in a final settlement.

The main driver of peace in Yemen over the past year has not been local or national consensus, but regional understandings – from the Saudi-Iranian rapprochement to the Omani mediation. It makes more sense for the STC to align itself with its suzerain backer, the UAE, and adopt a policy of disruption in response to Abu Dhabi's exclusion from the current process.

Leaked information on the proposed provisions of the settlement suggests the Saudis are willing to bargain away the rights and resources of the south in the face of the Houthis maximalist demands. But this has been met by an equally recalcitrant position among southerners. As one member of the PLC reportedly said at a recent meeting: "We have struggled in the south for years to take back our resources from the central authorities in Sana'a during the era of the republic... And now we are supposed to hand over our resources to Sana'a in the time of wilayat al-faqih (Iran's Guardianship of the Jurist)?"

## In Search of a Miracle

By Abdulghani al-Iryani

With the news of the Houthi delegation's visit to Riyadh raising hopes for peace among the Yemeni people, who have endured unspeakable suffering during the past nine years, it is unpleasant to have to temper expectations. Yet it is necessary to point out the ingredients still missing from a successful recipe for peace, and I can only hope that the parties will make the necessary efforts and concessions to acquire them.

None of the warring parties inside Yemen have articulated a clear vision for peaceful coexistence. Throughout the war, they have stuck to their guns and demanded the surrender of the other side. Off-the-shelf formulas for national reconciliation produced by the UN do not have a track record of success – every country has unique circumstances. Many states around the world are fragile or failing because they have not found a suitable arrangement.

Should the political will exist for a broader settlement, its prospects would still be troubled. Neither the Yemeni parties to the conflict nor their regional backers have experience in crafting durable power- (or wealth-) sharing agreements. The power-sharing arrangements that Yemen has experienced, such as the one that led to Yemeni unification in 1990, the Peace and Partnership Agreement between the Houthi group (Ansar Allah) and other Yemeni parties in 2014, or the Houthi-General People's Congress Government of National Salvation in Sana'a in 2016, have all ended in bloodshed. Regional actors have little experience producing durable power-sharing arrangements either. The most celebrated instance, the Taif Agreement of 1989 that ended the Lebanese Civil War, failed to produce a functional government. Absent a comprehensive agreement, there will be no sustainable peace in Yemen. The respective track records of the players in Riyadh give little cause to think this time will be different.

Stability in politics, like stability in construction, requires proper balance. The Yemeni parties, despite their talk of decentralization, have not been able to practice or even clearly articulate what they mean by it. The Houthis have instituted a level of central control that Yemen has never witnessed. Other parties have also demonstrated a level of authoritarianism that is inconsistent with power sharing. Indeed, the most authoritarian parties in Yemen are the Houthis and the armed groups included on the PLC, to say nothing of their autocratic backers. Unarmed parties have been ignored by regional actors and, to some extent, by the UN. Advocacy for a “big tent” approach, bringing all stakeholders into one forum to discuss aspects of peace and state structure, while the armed groups discuss de-escalation and the cessation of hostilities, has been ignored. The risks posed by the exclusive nature of the talks should not be minimized.

The only way to achieve balance is by creating multiple deterrents to the excesses of armed groups. Still, it is unclear how the weaker parties could broker a power-sharing arrangement with the vastly more powerful Houthis. Experts who participated in the Sana’a Center’s Yemen International Forums in Stockholm in 2022, and in The Hague in June of this year, have articulated a vision for a decentralized security sector that offers a reasonable level of balance among armed groups, local authorities, and the central government. Such a balance, if supported by international and regional actors, could set the foundation for a durable peace. But there is little reason to think the same conclusion will be reached in Riyadh.

## How Iran Perceives the Houthi-Saudi Talks

By Thomas Juneau

A flurry of diplomatic activity in mid-September, including the visit of a Houthi delegation to Riyadh, has led to renewed speculation that the Saudi-Houthi political process might be approaching a critical point. This raises the question of whether Iran, the Houthis’ main backer, supports these talks, and what its objectives are in doing so.

The Saudi decision to launch a military intervention in Yemen in 2015 triggered a profound change in Iran’s approach. While the Islamic Republic had been steadily increasing its support for the Houthis, until then the relationship was not a priority. But when Tehran saw its Saudi rival bogged down in a complex war it was clearly not able to win, it rapidly ramped up its presence in Yemen. The following years saw Iran provide the Houthis with parts for increasingly sophisticated weapons, including missiles and drones, as well as technical assistance to assemble these weapons locally and to use them effectively. The deep institutionalization of the Iran-Houthi partnership has represented a tremendous strategic return on a modest material investment: at a low cost, Tehran has gained a strong foothold on the southwestern tip of the Arabian Peninsula, and it has contributed to a costly quagmire from which its Saudi rival has struggled to extricate itself.

Iran is not opposed to a peace process in Yemen. In fact, it is willing to actively support it, but with one major caveat: it must lead to the consolidation of Houthi power and Iranian gains. This is what is happening now. Despite claims in the media that the talks aim to end the war in Yemen, Riyadh and the Houthis are not negotiating a sustainable peace.



Saudi Arabia has been attempting for years to minimize the costs of its withdrawal from a war that had long since become a lost cause. The outcome of Saudi-Houthi talks, should they succeed, would be the institutionalization of Houthi power and the consolidation of Yemen as a fragmented state. The original, domestic drivers of the civil war, those that led to the emergence of violence prior to the Saudi intervention, have not been resolved, and there is little indication that they can be successfully addressed soon.

Because the Houthis have won the war, they have little incentive to make serious concessions to Saudi Arabia, let alone to the weak and fragmented Saudi-backed internationally recognized government. The Houthis' objective is to gain international recognition and the consolidation of their domination of northwest Yemen. Because these are goals that Iran fully shares, it has a keen interest in helping create political space for the negotiations to succeed. But if Iran perceives that the negotiations are not heading in this direction, it will not hesitate to spoil the process and encourage the Houthis to hold firm with their maximalist demands. For Iran, prolonging the political process only means that Saudi Arabia continues to bleed. Tehran assesses, correctly, that it holds enough leverage to afford patience.

There has been speculation that Saudi Arabia might be aiming to pry the Houthis away from Iran, coaxing them to jettison their longstanding benefactor in exchange for peace and development. This is possible, and there certainly is precedent in Yemeni history for such sudden shifts in alliances. But it is easier said than done. The Iran-Houthi partnership is deeply entrenched, and mistrust between the Houthis (especially the hardliners now ascendant in the group) and Saudi Arabia is still high. Moreover, if the Houthi group were to accept a deeper rapprochement with Riyadh, one would expect Iran to implement its standard tactic of encouraging hardline elements loyal to Tehran to splinter from the movement and maintain a close partnership, enabling the Islamic Republic to preserve at least some of its influence.

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