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**Leveraging Rivalry: Non-State Actors in U.S.-China Great Power
Competition**

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Abstract:

The intensifying strategic rivalry between the United States and China, particularly in geopolitically contested regions such as the Middle East, has opened new avenues for non-state actors to assert influence. This thesis asks: How do politically and militarily oriented non-state actors in the Middle East leverage U.S.-China great power competition? While much of the existing literature isolates great power politics from the behavior of non-state actors, this research argues that these domains are increasingly interconnected. Drawing on case studies of Hezbollah, Hamas, and the Houthis, this project demonstrates that such actors strategically engage with great powers to advance their own interests. Specifically, these groups navigate the competing interests of Washington and Beijing by selectively participating in negotiations, generating instability, and courting economic partnerships that align with their long-term objectives. This analysis is grounded in qualitative data analysis, including records of diplomatic engagement, statements by political leaders, foreign aid flows, and infrastructure agreements linked to both U.S. and Chinese actors. In doing so, this thesis complicates state-centric understandings of great power competition and highlights how non-state actors actively shape, rather than simply respond to, the dynamics of U.S.-China rivalry.

Introduction:

As the international system shifts toward multipolarity, the foundations of traditional, state-centric paradigms in international relations are increasingly destabilized. In this context, non-state actors have emerged as important participants in global power dynamics, particularly in regions marked by intense geopolitical competition.

In parallel with China's ascent as a great power, politically and militarily oriented non-state actors, such as Hamas, Hezbollah, and the Houthis, have expanded their interactions with major states, including both the United States and China. These developments raise an interesting question: why are non-state actors increasingly engaging with various great powers, and what do these engagements reveal about their role in contemporary international politics?

While existing scholarship on U.S.-China competition in the Middle East has largely focused on interstate dynamics, it has paid comparatively little attention to how non-state actors operate within, and respond to, this competitive environment. Yet these actors are not merely passive recipients of great power influence. Rather, they are actively leveraging U.S.-China great power competition to enhance their own objectives. This research seeks to investigate this growing puzzle by answering the question: How do politically and militarily oriented non-state actors in the Middle East leverage U.S.-China great power competition? Through case studies of Hamas, Hezbollah, and the Houthis, this research will examine the forms these interactions take and the potential benefits they generate. In doing so, this research seeks to illuminate the growing intersection between great power rivalry and non-state actor behavior, challenging state-centric approaches to international competition.

Literature Review

A substantial body of international relations scholarship examines the intensifying strategic competition between the United States and China, often framing it as a defining feature of the contemporary international system. Much of this literature is rooted in realist and neorealist theories, which emphasize power transitions, security dilemmas, and the risk of hegemonic conflict (Mearsheimer 2014; Allison 2017). Scholars within this context frequently

analyze U.S.-China rivalry through military capabilities, alliance structures, and technological competition, arguing that China's rise poses a structural challenge to U.S. dominance. Complementary work from liberal and institutionalist perspectives focuses on economic interdependence, global institutions, and the constraints these impose on open conflict (He and Feng 2025). Within this broader literature, the Middle East is often treated as a secondary arena of competition. Studies of China's growing regional presence tend to emphasize energy security, infrastructure investment, and economic statecraft, particularly through initiatives such as the Belt and Road Initiative (BRI) (Fulton 2019; Rolland 2020). These analyses frequently contrast China's emphasis on non-interference and economic engagement with the United States' security-driven approach to the region (Singh 2021). While this scholarship provides important context for understanding the strategic environment in which U.S.-China rivalry unfolds, it remains overwhelmingly state-centric, focusing on how Washington and Beijing pursue their interests vis-à-vis regional governments rather than other political actors operating within these spaces.

Parallel to the literature on great power competition is a rich body of scholarship examining the role of non-state actors in international relations. Early work challenged the state-centric foundations of the discipline by demonstrating that actors such as international organizations, multinational corporations, and non-governmental organizations possess meaningful political influence (Keohane and Nye 1977). Subsequent scholarship has refined these insights by theorizing the mechanisms through which non-state actors exercise power. For example, Arts (2003) conceptualizes non-state influence through decisional, discursive, and regulatory forms of power, highlighting how such actors shape norms, policies, and governance outcomes beyond formal state authority. However, much of this literature privileges non-state

actors that are embedded in formal or semi-formal governance structures, such as NGOs, advocacy networks, or private firms (Shabir and Fatima 2024). Even when security-related non-state actors are examined, they are often framed as proxies or sources of instability rather than as strategic actors with autonomous agency. Research on armed non-state actors has traditionally focused on their use of violence, organizational structures, or relationships with patron states (Weinstein 2007; Staniland 2014). While these works provide valuable insights into how militant groups emerge and sustain themselves, they rarely situate such actors within broader patterns of global power competition.

Only a limited subset of scholarship explicitly examines the intersection between great power rivalry and non-state actor behavior, and even fewer studies focus on how non-state actors actively leverage competition between major powers to advance their own interests. Existing research often conceptualizes non-state actors as instruments of state strategy, particularly in discussions of proxy warfare, where great powers are assumed to direct or manipulate local groups to serve broader geopolitical goals (Bryjka 2020). This framing minimizes the strategic autonomy of non-state actors and obscures the ways in which they may independently engage, negotiate with, or signal to competing great powers. Moreover, when non-state actors are incorporated into analyses of U.S.-China competition, attention tends to center on economic or civil-society actors, such as Chinese firms operating abroad or transnational advocacy networks responding to global governance gaps (Aukia 2021; Keck and Sikkink 1998). Politically and militarily oriented non-state actors, particularly those operating in the Middle East, remain underexplored in this context. This gap is especially notable given the region's centrality to both U.S. security interests and China's expanding economic footprint. This thesis seeks to address this gap by examining how politically and militarily oriented non-state actors in the Middle East

strategically leverage U.S.-China great power competition. In doing so, it contributes to a more nuanced understanding of great power rivalry: one that recognizes non-state actors not merely as objects of competition, but as active participants shaping its dynamics.

Argument

Non-state actors are typically understood as structurally weaker than states, lacking formal sovereignty, military strength, and access to international institutions. Despite these disadvantages, politically and militarily oriented non-state actors continue to leverage and shape the behavior of major powers.

Non-state actors are not submissive participants in the international system, they are often engaged in struggles for survival, legitimacy, and influence. Facing military pressure, economic sanctions, and diplomatic isolation, these actors are incentivized to seek strategies that mitigate coercion and preserve their political relevance. In this context, leverage becomes a means of survival. By increasing the costs of their own suppression or by expanding their external options, non-state actors can shift from being targets of policy to actors that can actively shape international dynamics.

Great power competition creates the conditions for non-state actors to exhibit leverage. In a unipolar system, dominant powers are better able to coordinate coercive strategies such as sanctions, diplomatic isolation, and military pressure. Under such circumstances, non-state actors can be more effectively marginalized through unified international action. For example, in the post-9/11 period, during a moment of greater unipolarity, the United States led coordinated international efforts to sustain military, financial, and intelligence pressure against groups such as Al-Qaeda, significantly constraining their operational capacity and limiting their ability to

engage with external actors, ultimately contributing to the death of the group's founder, Osama bin Laden (Bergen 2012). However, in a competitive geopolitical environment, coordination becomes more difficult. The United States and China differ in their strategic priorities, diplomatic approaches, and willingness to engage with non-state actors. The United States often emphasizes security concerns, counterterrorism, and alliance commitments (Katulis 2025), while China prioritizes state sovereignty, economic engagement, and non-interference (Reeves 2025). These differences create gaps in enforcement and fragmentation in international responses, reducing the likelihood of coordinated pressure.

It is precisely this fragmentation that creates opportunities for leverage. When major powers do not fully align, efforts to isolate non-state actors become more costly and less effective. Across the cases examined in this thesis, two recurring patterns emerge in how non-state actors interact with great powers in these conditions. First, some actors are able to signal or pursue engagement with one great power following pressure or exclusion by another, thereby increasing the costs of continued isolation. Even when tangible support from the rival power is limited, the presence of an alternative reduces the credibility of coercive threats. Second, non-state actors that are deeply embedded in regional security dynamics are able to raise the costs of their own suppression. Their capacity to generate instability, whether through armed conflict, disruption of trade routes, or escalation risks, forces major powers to weigh broader geopolitical consequences when determining their responses. These dynamics are particularly visible in the Middle East, a region characterized by persistent conflict, weak or fragmented state institutions, and high levels of foreign intervention. The region is also of enduring strategic importance to both the United States and China, due to its energy resources, trade routes, and geopolitical positioning (Shankar 2023). As a result, the Middle East serves as a key arena in

which great-power competition intersects with non-state actor politics, and is the reason why this thesis focuses on the Houthis, Hezbollah, and Hamas.

Importantly, these patterns do not operate uniformly across all cases. Some actors are better positioned to take advantage of alternative diplomatic or economic relationships, while others rely more heavily on their ability to generate strategic risk. As a result, the forms of leverage observed vary depending on the actor's geographic context and relationship to regional conflict dynamics. Taken together, this framework argues that non-state actors can exploit the structural features of a competitive international system to shape the behavior of more powerful states. In doing so, they transform great-power competition into a source of leverage, enabling them to survive, remain politically relevant, and influence the strategic environment in which they operate.

Concept Specification

To analyze how non-state actors in the Middle East leverage U.S.-China great power competition, it is necessary to establish clear conceptual boundaries and define the key terms under investigation.

Politically and militarily oriented non-state actors in this thesis refer to organized political and/or military groups that operate outside formal state authority but exercise sustained influence over territory, populations, or political processes. Unlike civil society organizations or multinational corporations, the actors examined here, Hamas, Hezbollah, and the Houthis, combine coercive capacity with political organization and engage directly or indirectly with state actors.

Great power competition refers to sustained strategic rivalry between major states seeking to expand or preserve influence across multiple domains, including security, diplomacy, and economic engagement. In the context of U.S.-China relations, this competition does not primarily manifest as direct military confrontation but rather through parallel efforts to shape regional alignments, secure access to markets and infrastructure, and project political legitimacy (Brands 2022).

Finally, leverage refers to a non-state actor's ability to extract diplomatic, economic, or political concessions by exploiting asymmetries in interest among more powerful actors, in this case, the strategic rivalry between the United States and China. It functions as a form of positional bargaining power: by engaging with one great power, non-state actors raise the strategic costs for the rival power to continue isolating them. This kind of leverage does not always yield direct policy concessions, but it can result in increased visibility, inclusion in negotiations, and other political or economic benefits, such as the survival of the group. In the context of the U.S.-China competition, leverage is made possible by the fact that both states are pursuing influence in the Middle East and are responsive to opportunities to gain favor with influential actors on the ground, even when those actors are not states.

Operationalization

To operationalize how non-state actors leverage great power competition, the dependent variable will measure adjustment by the United States and China in response to the actions of non-state actors. Adjustment is operationalized through observable changes in state behavior, including: shifts in diplomatic engagement, such as indirect talks, mediation efforts, or the tacit recognition of non-state actors, as well as changes in military posture, including escalation,

restraint, or acceptance of limited ceasefires, modifications to sanctions regimes, terrorist designations, or enforcement intensity. Evidence of adjustment does not require formal recognition or policy reversal. Incremental changes, such as toleration, selective engagement, or prioritization of containment over elimination, are treated as meaningful indicators of leverage.

The independent variable is non-state actor leverage. Leverage encompasses a variety of measures, such as actions that impose political, economic, or reputational costs on one great power. For example, disruption of global commons such as maritime chokepoints, actions that challenge a great power's credibility or security commitments, or financial engagement, are all ways in which a non-state actor can display leverage. Further, leverage will also exhibit non-state actors deliberately differentiating between great powers, offering restraint, access, or cooperation to one while confronting another. This may include: sparing or facilitating the commercial or diplomatic interests of one power, signaling openness to engagement with alternative patrons, calibrating violence to avoid provoking a specific actor. Together, these behaviors create leverage by sharpening asymmetries in how great powers experience costs and benefits.

This operationalization does not assume that non-state actors exercise complete control over great-power behavior, nor does it suggest that leverage produces consistent or predictable outcomes. Rather, leverage is treated as contingent, situational, and uneven. The goal is not to demonstrate dominance by non-state actors, but to show how they can meaningfully shape great-power behavior by exploiting asymmetries within great-power competition.

Hypotheses

This thesis advances the central hypothesis that politically and militarily oriented

non-state actors that engage both the United States and China are more likely to extract diplomatic, economic, or political advantages than those that do not.

H1: Non-state actors that increase engagement with one great power following pressure or exclusion by another are more likely to extract concessions from the opposing power.

H2: Strategically important non-state actors are more likely to extract concessions in a competitive great-power environment, as their suppression carries broader geopolitical costs for rival powers.

These hypotheses identify two pathways through which non-state actors convert great-power rivalry into leverage. The first emphasizes signaling: by pursuing engagement with a rival power after facing pressure, non-state actors strengthen their outside options and constrain unilateral coercion. The second emphasizes that actors capable of producing significant instability raise the geopolitical costs of their own suppression, thereby increasing their bargaining power.

Case Selection and Rationale

The Middle East is a particularly appropriate region for this analysis due to its geopolitical centrality to both powers. The United States has long maintained extensive military, diplomatic, and economic involvement in the region, while China's expanding presence, driven by energy dependence, infrastructure investment, and trade, has increasingly positioned it as a consequential external actor (Fulton 2019). At the same time, the Middle East features a high density of influential non-state actors that exercise territorial control, command armed forces, and engage in political governance, making it a critical site for examining non-state behavior

within great power rivalry.

The cases selected for this study, Hamas, Hezbollah, and the Houthis, were chosen based on several shared characteristics. All three are politically and militarily oriented non-state actors that operate outside formal state authority while exerting substantial influence over political processes and security dynamics within their respective countries. The Houthis represent a critical case of leverage through control over strategic maritime infrastructure. Their presence along the Red Sea shipping corridor (Council on Foreign Relations 2026a) positions them to impose asymmetric economic costs on external actors by selectively disrupting maritime trade. This makes the Houthis an analytically useful case for examining how non-state actors exploit great power competition through geographic positioning and selective economic engagement. Hezbollah exercises leverage through political institutionalization and economic signaling. As a powerful actor within Lebanon's political system, Hezbollah has publicly encouraged engagement with China as an alternative to Western conditional assistance (Vohra 2020). This case allows for analysis of how non-state actors embedded within state institutions can leverage great power rivalry by aligning domestic economic narratives with external geopolitical competition. Hamas provides a third case characterized by diplomatic engagement under conditions of extreme international constraint. Despite its designation as a terrorist organization by the United States (U.S. Department of State n.d.a), Hamas has engaged in talks with both Chinese and U.S. representatives in recent years. This case highlights how non-state actors facing diplomatic isolation may nonetheless leverage great power competition to gain visibility, recognition, and strategic relevance.

At the same time, the cases exhibit meaningful differences. The Houthis operate as a de facto governing authority over key territory and maritime chokepoints, Hezbollah is deeply

embedded within a formal state political system, and Hamas functions under conditions of severe international isolation while maintaining localized governance and armed capacity. This variation enables an examination of how different forms of leverage are deployed by non-state actors.

Data Sources and Availability

This analysis draws primarily on publicly available, open-source qualitative data. Primary sources include official U.S. government documents such as congressional legislation, sanctions designations by the Treasury Department, State Department statements, and public remarks by senior officials. These sources are used to assess U.S. threat perceptions, policy, and enforcement tools toward non-state actors. International documents, including United Nations Security Council resolutions and ceasefire agreements, provide additional context on legal and institutional provisions shaping state responses.

To assess China's role, the thesis relies on official Chinese government statements, speeches by senior Chinese leaders, and policy documents related to China's Middle East engagement, Belt and Road Initiative participation, and arms export practices. These materials are used to evaluate China's diplomatic posture, economic statecraft, and emphasis on non-interference in contexts where non-state actors wield significant influence.

Secondary sources include academic literature, policy reports from think tanks, and investigative journalism addressing non-state armed groups, sanctions enforcement, proxy networks, and Chinese and American foreign policy behavior. These sources provide critical context on organizational structures, financing mechanisms, military capabilities, and political embeddedness, as well as comparative insight across cases.

Data availability presents inherent limitations. Non-state actors operate through secrecy, intermediaries, and informal networks, making systematic quantitative data on finances, decision-making, and external coordination difficult to obtain. In particular, direct evidence of intentional coordination between China and specific non-state actors is often unavailable, especially where interactions occur indirectly through state partners or proxies.

Despite these constraints, open-source qualitative data is well suited for this thesis. Observable state behavior such as sanctions regimes, diplomatic positioning, aid allocation, and economic engagement, provides sufficient evidence to assess how non-state actors leverage U.S.-China competition. By triangulating across multiple cases and sources, this study identifies recurring mechanisms through which non-state actors shape great-power behavior under conditions of rivalry.

Research Design

This thesis employs a qualitative comparative case study design to examine how politically and militarily oriented non-state actors in the Middle East leverage U.S.-China great power competition. Rather than treating non-state actors as reactive or subordinate to state interests, the analysis centers on how their actions, signaling, and strategic positioning elicit responses from the United States and China. The analysis focuses on three cases: Hezbollah, Hamas, and the Houthis, which allow for cross-case comparison while capturing variation in modes of engagement with external powers.

For each case, the research traces episodes in which non-state actors undertook actions or issued signals that intersected with U.S. or Chinese strategic interests. These actions include economic positioning, public diplomatic messaging, participation in negotiations, and selective

cooperation or confrontation. The analysis then examines how the United States and China responded to these actions, whether through engagement, accommodation, tolerance, or strategic recalibration.

The primary data for this research consist of publicly available documents and media sources, including official statements, speeches, press releases, interviews, and reporting from international and regional news outlets. These materials are used to trace patterns of diplomatic signaling and strategic engagement directed toward the United States and China. This document-based approach is well-suited to the study of non-state actors, whose external interactions are often conducted through indirect or informal channels rather than formal diplomatic institutions. Furthermore, this research design emphasizes relational dynamics rather than linear causation. The goal is not to demonstrate that non-state actors determine great power behavior, but to show that their actions can alter strategic calculations by introducing costs, opportunities, or considerations that great powers cannot ignore. In doing so, the study illustrates how non-state actors function as active participants in great power competition, shaping its dynamics even in the absence of formal diplomatic recognition.

Case Studies

The Houthis:

The Houthis, also known as Ansar Allah (“Supporters of God”), are an armed political and religious group originating in northern Yemen. Emerging in the 1990s among the Zaydi Shi‘a minority, the group initially developed under the leadership of Hussein Badreddin al-Houthi as a revivalist movement aimed at resisting state corruption and growing Saudi influence in Yemen. Long before becoming a central actor in global geopolitics, the Houthis

positioned themselves as defenders of Yemeni sovereignty and Zaydi identity against what they framed as foreign-backed domination (Encyclopedia Britannica 2026).

The movement radicalized significantly in the early 2000s, particularly in response to the U.S. invasion of Iraq in 2003. During this period, the Houthis adopted their now-infamous slogan: “God is the Greatest, death to America, death to Israel, a curse upon the Jews, victory to Islam,” which crystallized their anti-American and anti-Israeli orientation (Riedel 2017). While the slogan reflects an ideological position, the Houthis’ political platform has always been more eclectic, combining Yemeni nationalism, anti-corruption populism, Zaydi Shi‘ism, and resistance to Western and Saudi intervention (Encyclopaedia Britannica 2026; Juneau 2016). Over time, the group cultivated operational and ideological ties with Iran and aligned itself rhetorically with actors such as Hezbollah and Hamas, though it has resisted full subordination to Tehran (Juneau 2016).

The Houthis’ seizure of Yemen’s capital, Sanaa, in 2014 marked their transformation from a regional insurgent movement into a de facto governing authority controlling significant territory and population (Salisbury 2026). This shift fundamentally altered their strategic value, not only within Yemen’s civil war, but also within broader regional and international power contests. Since that moment, the Houthis have functioned simultaneously as a domestic governing actor and a transnational disruptor capable of affecting global commerce.

The Houthis and the United States

The relationship between the Houthis and the United States has been consistently hostile and is best understood as an extension of Washington’s long-standing partnership with Saudi Arabia. Since the 1960s, U.S. policy toward Yemen has been shaped largely through the lens of

Saudi security concerns. When the Saudi-led coalition intervened militarily in Yemen in 2015 to roll back Houthi territorial gains, the United States provided intelligence, logistical assistance, and arms support, framing the conflict as part of a broader effort to counter Iranian regional influence (Riedel 2018). From the Houthis' perspective, this intervention, and U.S. support for it, rendered Washington directly complicit in Yemen's humanitarian catastrophe. Civilian casualties, famine, and infrastructural collapse were folded into the Houthis' broader narrative of resistance against Western-backed aggression. As a result, anti-Americanism became not only an ideological feature of the movement but an organizing principle through which the Houthis could mobilize domestic legitimacy and regional sympathy.

In 2021, the Biden administration's early policy shifts, including the revocation of the Houthis' Foreign Terrorist Organization (FTO) designation, the declared end to U.S. support for Saudi offensive operations, and the appointment of a special envoy for Yemen, signaled a partial recalibration of U.S. strategy (Montgomery 2021). Yet these measures failed to fundamentally alter the adversarial nature of the relationship between the U.S. and the Houthis. Following Hamas's October 7, 2023 attack on Israel, the Houthis explicitly tied themselves to the Israel-Palestine conflict, declaring war on Israel and dramatically expanding their operational theater beyond Yemen (Kusovac 2023). Between late 2023 and 2025, the Houthis engaged in a sustained campaign against maritime traffic in the Red Sea, hijacking vessels, launching anti-ship missiles, and repeatedly targeting U.S. naval assets (Council on Foreign Relations 2026a). In response, the United States re-listed the Houthis as a Foreign Terrorist Organization (Kingston 2024), resumed sales of offensive weapons to Saudi Arabia (Hansler 2024), and undertook a series of military operations, including Prosperity Guardian and later Operation Rough Rider, designed to restore freedom of navigation (Johnsen 2025). The Trump

administration has also ended virtually all foreign assistance to Yemen, including government-controlled areas that oppose Houthi expansion (Alley 2025). Despite significant firepower, including the use of B-2 bombers against underground Houthi facilities in October 2024, these operations failed to decisively neutralize the group (Al Jazeera 2024a). A ceasefire brokered by Oman in May 2025 halted attacks on U.S. vessels but left intact the Houthis' capacity, and stated intent, to target Israeli-linked and other commercial shipping (Reuters 2025).

These dynamics demonstrate a pattern of U.S. adjustment in response to Houthi behavior. Washington reimposed the FTO designation, resumed arms sales to Saudi Arabia, launched costly air campaigns, and ultimately accepted a limited bilateral truce that implicitly acknowledged Houthi staying power. By late 2025, the United States had deprioritized Yemen institutionally, ending most foreign assistance, effectively managing the Houthis as a chronic, contained disruption rather than a resolvable threat. This posture reflects not U.S. dominance, but constraint in their ability to effectively confront the Houthis.

The Houthis and China

China's relationship with Yemen, and by extension, the Houthis, has followed a different trajectory. Yemen was one of the first Arab countries to recognize the People's Republic of China in the 1950s, and over the following decades Beijing cultivated economic ties through infrastructure development, energy investments, and trade (Embassy of the Republic of Yemen in Beijing n.d). Today, China remains one of Yemen's largest trading partners and retains a strategic interest in regional stability, particularly in relation to energy flows and maritime commerce (Observatory of Economic Complexity n.d). Unlike the United States, China has avoided direct military confrontation with the Houthis and instead relies on indirect engagement through

regional intermediaries, particularly Iran and Saudi Arabia. This approach became most visible in 2023, when China brokered a landmark diplomatic deal between Saudi Arabia and Iran, an agreement that indirectly facilitated negotiations between Riyadh and the Houthis (Hafezi, Abdallah, and El Yaakoubi 2023). Although the Houthis were not formal participants in these talks, China's role in shaping the regional diplomatic environment conferred upon them a form of de facto recognition. More importantly, it signaled Beijing's emergence as a diplomatic actor capable of influencing security dynamics in a region traditionally dominated by the United States.

China's engagement with the Houthis may also extend beyond diplomacy. Since the outbreak of Houthi attacks on Red Sea shipping in 2023, there is evidence that Chinese firms have played an important role in militarily supporting the group. In April 2024, the U.S. Treasury sanctioned Chang Guang Satellite Technology Co., accusing it of providing the Houthis with satellite services used to identify and track commercial and military vessels in the Red Sea (Saraih 2025). Chinese-made drone components, including propellers and control units, have been intercepted en route to Houthi forces on multiple occasions, with government customs authorities seizing a shipment of 800 drone propellers in March 2024 alone (Saraih 2025). This military support has allowed the Houthis to transform from an armed group in a civil conflict to an actor capable of producing instability in the region. Beijing has publicly denied any wrongdoing, maintaining an official narrative of neutrality and calling on all parties to engage in political dialogue.

Leveraging Great-Power Competition: The Red Sea Campaign

The clearest illustration of Houthi leverage over great powers emerges from their Red Sea

maritime campaign. Beginning in November 2023, the Houthis established a blockade in the Bab al-Mandab Strait, attacking commercial vessels transiting one of the world's most critical maritime chokepoints, citing their solidarity with Palestinians and opposition to Israeli offenses following October 7th (Nada 2024). By early 2024, shipping traffic through the Red Sea corridor had declined by approximately 80 percent, forcing vessels to reroute around the Cape of Good Hope, adding 14-25 days to maritime journeys and imposing large fuel and operational cost (TransPak 2024). According to U.S. government figures, the Houthis conducted over 145 attacks on commercial shipping and struck U.S. naval assets more than 170 times by March 2025 (Shinego 2025).

What distinguishes this campaign is not merely its scale, but its selectivity. While U.S. and Western-flagged vessels were repeatedly targeted, Chinese and Russian ships were largely spared. Following meetings between Houthi officials and Chinese and Russian diplomats, the group explicitly pledged not to attack vessels associated with either country (Chakraborty 2024). This deliberate differentiation represents a sophisticated hedging strategy: by imposing costs on the United States while accommodating China, the Houthis exploited asymmetries in great-power interests and responsibilities. A natural objection is that this selectivity reflects Iranian influence rather than autonomous Houthi strategy. This interpretation, however, underestimates the degree to which the Houthis have consistently pursued interests that diverge from, and at times conflict with, Iranian preferences. The Houthis have repeatedly resisted full subordination to Tehran, maintaining independent command structures, negotiating directly with foreign governments without Iranian mediation, and on several occasions escalating beyond what Iran's regional calculus would have preferred (Minor 2024). Their decision to enter the Red Sea campaign was announced unilaterally and framed explicitly in terms of Palestinian solidarity and

Yemeni resistance, not as an extension of Iranian foreign policy.

For Washington, the attacks directly challenged its long-standing role as the guarantor of freedom of navigation. By consistently targeting U.S. and Western vessels while framing these attacks as resistance against American and Israeli policy, the Houthis undermine U.S. credibility and compel Washington to respond militarily. Operations such as Prosperity Guardian and Rough Rider were intended to reassert American dominance, but the Houthis' ability to withstand strikes and rapidly resume attacks signaled that the U.S. could not decisively restore order (Middle East Council on Global Affairs 2025). This dynamic benefits the Houthis: every U.S. operation that fails to eliminate their capabilities bolsters their narrative of standing up to a superpower and strengthens their domestic and regional legitimacy.

For China, by contrast, the Houthis' restraint ensured continued access to critical trade and energy routes without requiring Beijing to assume comparable security burdens. China has presented itself globally as an alternative to Western security structures and has vested interests in portraying the United States as a destabilizing or ineffective force in the Middle East (Zheng 2026). By allowing their ships to pass through the Bab al-Mandab strait, the Houthis offer Beijing a low-cost opportunity to contrast their restrained, diplomatic engagement with Washington's more forceful but less effective military responses. In return, the Houthis receive implicit protection: neither China nor Russia has joined U.S.-led coalitions to strike Houthi targets (Ramani 2024). In addition, both have used forums, such as the UN Security Council, to temper resolutions that authorize broad force in the Red Sea, illustrated by their abstention on Resolution 2812, which extended monitoring of Houthi attacks but was criticized for reinforcing a framework that could justify continued military action against Yemen (United Nations Security Council 2026)). China's abstention reflects its reluctance to endorse coercive approaches. This

selective aggression thus positions the Houthis as a valuable asymmetric partner in the broader U.S.-China contest.

The triangular relationship between the Houthis, Iran, and China further amplifies this leverage. China is the largest purchaser of Iranian oil, buying more than 80% of its shipped oil, providing Tehran with an economic lifeline despite U.S. sanctions (U.S.-China Economic and Security Review Commission 2026). This leaves China uniquely exposed to any supply disruption from conflict in the Middle East (Reuters 2026). Because the Houthis function as one of Iran's most strategically valuable regional partners, Beijing has an indirect but significant interest in maintaining stable relations with the group: disruptions involving the Houthis risk triggering wider escalations that could endanger Iran's oil exports and, by extension, China's energy security (The Soufan Center 2026). This triangular dynamic: Houthis benefiting from Iranian support, Iran relying on Chinese oil purchases, and China depending on uninterrupted regional energy flows: creates a structural incentive for Beijing to restrain criticism of the Houthis and to seek assurances that Chinese commercial vessels remain untouched. The Houthis exploit this interdependence by presenting themselves as cooperative toward Chinese interests, effectively using non-aggression as a bargaining chip that constrains Beijing's willingness to support U.S.-led punitive measures. Importantly, this strategy does not require formal alliance or direct coordination. By simply forcing differential responses from Washington and Beijing, the Houthis shape the behavior of both powers. It is important to be precise about what this argument claims and does not claim. It does not assert that China has deliberately protected the Houthis or coordinated with them to undermine U.S. policy. Rather, the structural logic of Chinese energy dependence and Iranian interdependence produces a consistent pattern: Beijing refrains from joining punitive coalitions, tempers UN resolutions that could authorize force, and

maintains open diplomatic channels with actors in the Houthi orbit. The Houthis benefit from this pattern regardless of whether it reflects intentional Chinese accommodation. By presenting themselves as cooperative toward Chinese commercial interests, they exploit an existing asymmetry, one that constrains Beijing's willingness to align with Washington to unilaterally punish the Houthis.

The outbreak of war between the United States and Iran in 2026 further reinforces this dynamic by illustrating how the Houthis can convert regional conflict into leverage. In response to U.S. and Israeli strikes on Iran, the Houthis' paramount leader, Abdul Malik al-Houthi, declared that the group was ready to enter the war, stating, "Regarding military escalation and action, our fingers are on the trigger, ready to respond at any moment should developments warrant it" (Arab News 2026). The Houthis did just this. On March 28, 2026, the group fired a barrage of ballistic missiles targeting "sensitive Israeli military sites," and Brigadier-General Yahya Saree stated that strikes "will continue until the declared objectives are achieved" and until the "aggression against all fronts of the resistance ceases" (Al Jazeera 2026). This escalation carries significant implications for both the United States and China, but more importantly, it enhances the Houthis' leverage by increasing the costs of their suppression. For Washington, the attack raises the risk of a multi-front regional war that would stretch military resources, undermine its security commitments, and potentially require expanded U.S. strikes in Yemen to secure Red Sea shipping. For Beijing, the expansion of conflict threatens disruptions to critical energy flows and trade routes on which its economy depends. Although China has not directly acknowledged the Houthis' role in the conflict, it has urged an immediate end to hostilities, warning that continued escalation will plunge the region into chaos. Chinese Foreign Ministry spokesperson Lin Jian emphasized that "force will only lead to a vicious cycle" and

called for a return to dialogue and negotiations (Ministry of Foreign Affairs of the People's Republic of China 2026). By escalating in response to U.S. and Israeli actions, the Houthis transform themselves from a local insurgent group into a regional actor capable of shaping great-power calculations. Their actions force the United States to balance escalation against the risks of wider war, while simultaneously creating instability that China seeks to avoid. In doing so, the Houthis increase the costs of coordinated action against them and reinforce their position as an indispensable actor in both regional conflict dynamics and the broader U.S.-China competitive environment.

This asymmetry is central to understanding Houthi leverage. U.S. naval operations such as Prosperity Guardian and Operation Rough Rider were intended to reassert American credibility and restore maritime order, yet their limited effectiveness exposed Washington's constraints. Each failed or inconclusive operation imposed reputational and strategic costs on the United States while reinforcing the Houthis' narrative of resistance against a militarily superior power. By contrast, China incurred few costs while benefiting from continued access to vital shipping lanes and the ability to contrast its diplomatic posture with U.S. military escalation.

The Houthis' decision to halt maritime attacks following the U.S.-Houthi ceasefire in May 2025 (Collins 2025) and the Gaza ceasefire later that year (Al Jazeera 2025a) further underscores the strategic, rather than purely ideological, logic behind their behavior. By pausing attacks while explicitly reserving the right to re-escalate, the Houthis demonstrate their ability to calibrate violence in response to shifting political conditions, including broader regional conflicts such as the war involving Iran. This capacity to "turn on and off" disruption allows the group to preserve its material base, avoid overextension, and maintain its relevance as an indispensable actor in both regional security and future negotiations.

Taken together, the Houthis' actions, from their selective targeting in the Red Sea to their escalation during the Iran conflict, illustrate how a non-state actor can leverage great-power competition by exploiting asymmetries in interests, responsibilities, and risk tolerance. Rather than merely reacting to U.S.-China rivalry, the Houthis actively structure that rivalry, raising costs for the United States while offering China a low-cost alternative to Western security provision. Through control of a critical maritime chokepoint, calibrated violence, and the ability to escalate across multiple regions, the Houthis convert their capabilities into global geopolitical leverage. Their case demonstrates that non-state actors are not merely reactive participants in great-power politics, but capable of shaping the strategic environment in ways that compel even the most powerful states to adapt.

Hezbollah

Hezbollah is a Shi'a Islamist political party and militant group based in Lebanon. It emerged during Lebanon's fifteen year civil war (1975-1990), following Israel's 1982 invasion of Southern Lebanon. As a response, a group of Lebanese Shiites, influenced by the theocratic government in Iran, mobilized against Israeli forces. Seeing an opportunity to expand its influence, Iran and its Islamic Revolutionary Guard Corps (IRGC) provided financial, ideological, and military support to train the budding militia, which eventually coalesced into Hezbollah, or "The Party of God" (Council on Foreign Relations 2026b). In its 1985 manifesto, Hezbollah articulated a revolutionary agenda that included resistance against Israel, the expulsion of Western forces from Lebanon, and allegiance to Iran's Supreme Leader. Hezbollah entered formal Lebanese politics in the 1990s and, by the 2000s, had become a dominant force within the country's political system. Its 2009 updated manifesto softened earlier revolutionary

language, emphasizing Lebanese sovereignty and “true democracy,” while retaining its commitment to armed resistance. Today, Hezbollah is widely described as a “state within a state.” It maintains an independent military apparatus stronger than that of the Lebanese Armed Forces, exercises influence over key political institutions, and provides social services, welfare, and reconstruction assistance in areas under its control. Following the death of long-time Secretary General Hassan Nasrallah in an Israeli airstrike in 2024, leadership passed to Naim Qassem, who has reaffirmed Hezbollah’s strategic priorities of deterrence against Israel and resistance to U.S. influence (Council on Foreign Relations 2026b). This dual identity, as both a political actor embedded in the Lebanese state and an autonomous military organization, forms the foundation of Hezbollah’s leverage in international politics.

Hezbollah and the United States

The relationship between Hezbollah and the United States is adversarial. Washington designated Hezbollah a Foreign Terrorist Organization (FTO) in 1997 and has consistently framed the group as a global security threat (U.S. Department of State 1997). U.S. policy toward Hezbollah has focused on economic isolation, sanctions, and pressure on the Lebanese state to curtail the group’s military capabilities. Congress reinforced this strategy through legislation such as the Hizballah International Financing Prevention Act of 2015, which targets international financial institutions that facilitate Hezbollah-linked transactions (U.S. House of Representatives 2015). Hezbollah’s financial base has been a central concern of U.S. policymakers. In addition to substantial financial support from Iran, the group relies on a combination of charitable networks and illicit activities, including money laundering and drug trafficking (U.S. House of Representatives 2017). Under the Biden administration, the U.S. Treasury Department

sanctioned Hezbollah-linked financial networks across the Middle East, Africa, and Latin America, emphasizing a global effort to disrupt the group's revenue streams (Foundation for Defense of Democracies 2023). U.S. officials have also increasingly tied Lebanon's economic recovery to demands that Hezbollah disarm or withdraw its forces north of the Litani River, in line with United Nations Security Council resolutions and ceasefire arrangements with Israel (Al Jazeera 2025b). After the kidnapping of Venezuelan president Nicolas Maduro In January 2026, Secretary of State Rubio even claimed, "In the 21st Century, under the Trump administration, we are not going to have a country like Venezuela in our own hemisphere in the sphere of control and the crossroads for Hezbollah, for Iran and for every other malign influence in the country, in the world. That's just not going to exist" (Hallowell 2026).

Despite this pressure, U.S. efforts to marginalize Hezbollah have repeatedly encountered limits. Hezbollah's integration into Lebanon's political system complicates attempts to isolate it without simultaneously destabilizing the Lebanese state (Congressional Research Service 2018). Furthermore, Hezbollah does not operate through the international economic system, they primarily use cash, and rely on donations from supporters for a substantial portion of their revenue (U.S. House of Representatives 2017). In 2018, former Hezbollah Hassan Nasrallah said, "I won't say that the sanctions won't have an effect. They will have an effect. But we have the strength, infrastructure, and human resources to get through these difficulties" (Mroue and Abdul-Zahra 2018). By late 2025, the United States intensified calls for Lebanese authorities to curb Hezbollah's military autonomy, framing disarmament as a prerequisite for international assistance (Bassam 2025). While Lebanese officials announced initial steps toward disarmament, implementation remained contested, with official discourse softening from "disarmament" to "containment," underscoring Washington's constrained leverage (Levornik 2026).

Hezbollah and China

China's approach to Hezbollah differs from that of the United States. China established diplomatic relations with Lebanon in 1971 (Tucker 2021) and has long emphasized principles of non-interference and state sovereignty in its Middle East policy (Fulton 2026). Unlike Washington, Beijing does not designate Hezbollah as a terrorist organization and has avoided publicly condemning the group, even as it expands its economic and diplomatic footprint in Lebanon (Tzur 2025).

Chinese engagement with Lebanon has intensified in recent years through trade, humanitarian assistance, and infrastructure-oriented cooperation. In a 2018 speech, President Xi Jinping outlined a, "China-Arab future-oriented strategic partnership of comprehensive cooperation and common development" (International Department of the Central Committee of The Communist Party of China 2018). In 2024, Xi provided millions of dollars of aid to Lebanon, following skirmishes between Hezbollah and Israeli forces in Southern Lebanon (Reuters 2024). China is also Lebanon's largest trading partner, and Chinese officials have repeatedly highlighted opportunities for expanded cooperation in energy, telecommunications, and reconstruction (Marks 2025). In November 2025, The Embassy of the People's Republic of China in Beirut held a media briefing to present the outcomes of the Fourth Plenary Session of the 20th National Congress of the Communist Party of China. During this session, Chinese Ambassador to Lebanon, Chen Chuan Dong, detailed China's strategic vision for the coming years, including expanding prospects for China-Lebanon cooperation. For example, he pointed to solar-powered projects for Lebanese villages and telecommunication facilities. He also emphasized that China has been Lebanon's largest trading partner for nine consecutive years, and China remains open to importing more Lebanese products and supporting Lebanese participation

in the China International Import Expo in Shanghai (Ministry of Foreign Affairs of the People's Republic of China 2025). In the same vein, Lebanon formally joined China's Belt and Road Initiative (BRI) in 2017, positioning itself as a potential node in Beijing's broader connectivity strategy (Nedopil 2025). Although many proposed projects have stalled due to Lebanon's financial collapse and political paralysis, the strategic logic of Chinese engagement remains significant.

Crucially, China's economic statecraft in Lebanon operates within a political environment in which Hezbollah is an unavoidable actor. Hezbollah's influence over key ministries, municipalities, and territories, particularly in southern Lebanon and the Bekaa Valley, means that infrastructure investment and reconstruction assistance inevitably strengthen the group's local legitimacy and governance capacity. Even when Chinese aid is formally directed to the Lebanese state, Hezbollah benefits indirectly through improved service provision, employment, and reconstruction (Khatib 2021). In this sense, Chinese engagement functions as a form of *de facto* assistance: while Beijing does not openly fund or arm Hezbollah, its refusal to isolate the group contrasts sharply with U.S. efforts at economic strangulation.

China's strategic incentives for this posture are clear. Lebanon's geographic position offers access to Mediterranean trade routes. Ambassador Chen praised Lebanon for its strategic positioning in the Belt and Road Initiative, stating, "Lebanon's geographic location, human capital, and cultural vibrancy make it a natural partner in China's development vision" (The Beirut 2025). Avoiding confrontation with Hezbollah reduces risks to Chinese investments and personnel while reinforcing China's image as a pragmatic, non-interventionist alternative to Western powers.

Additionally, although there is a lack of credible evidence that China *directly* supplies

weapons to Hezbollah, Chinese origin-military systems have appeared within Hezbollah's arsenal since 2006. Weapons of Chinese origin, ranging from light shoulder-fired weapons to sophisticated missile systems, have significantly advanced Hezbollah's military capabilities. These weapons are linked to two Chinese manufacturers: China Aerospace Science and Industry Corporation (CASIC) and China Northern Industries Corporation (NORINCO). These corporations are both heavily sanctioned by the United States and face criticism for providing arms to unstable regions. These Chinese weapons are typically integrated into broader supply chains controlled by the IRGC, which smuggles arms to Hezbollah (Skold and Mastrangelo 2025). However, regardless of if China's activities are intentional or facilitated through intermediaries, they empower non-state actors such as Hezbollah nonetheless.

Leveraging Great-Power Competition: "Turning East"

Hezbollah's leverage within U.S.-China great power competition operates through a positional strategy embedded in Lebanon's political economy. Because Hezbollah is deeply integrated into the Lebanese state while retaining autonomous military capacity, it transforms Lebanon itself into a site of strategic contestation. This positioning allows Hezbollah to exploit asymmetries in U.S. and Chinese interests: Washington prioritizes Hezbollah's containment and Israeli security, while Beijing prioritizes regional stability, trade access, and non-interference (Reeves 2025). The divergence between containment and engagement generates bargaining space. Hezbollah leverages this space to mitigate U.S. pressure and preserve its military autonomy.

U.S. strategy toward Hezbollah relies heavily on financial coercion. Sanctions targeting Hezbollah-linked individuals, banks, and global financial networks are designed to sever revenue

streams and increase the economic costs of the group's political position (Robinson 2023). However, the effectiveness of such sanctions is low, and may actually bolster legitimacy by deeming these groups "important enough" to warrant targeting (Frakes 2022). China's skepticism toward the U.S.-led sanctions regime is evident, with the Chinese Foreign Ministry stating in 2017, "The Chinese side has always opposed the use of unilateral sanctions, we believe that the dispute settlement arising between different countries should be implemented on the basis of mutual respect through an appropriate, fair dialogue" (Asian News International 2017). This, in addition to its refusal to designate Hezbollah as a terrorist organization, creates structural limits on Washington's coercive leverage.

China is Lebanon's largest trading partner and has consistently expressed interest in expanding infrastructure, energy, and telecommunications cooperation. Even when major Belt and Road Initiative projects have stalled due to Lebanon's financial collapse, Beijing's continued diplomatic and economic engagement provides an alternative external partner. This alternative matters not because China directly funds Hezbollah, but because Hezbollah is inseparable from Lebanon's governing institutions, any macroeconomic stabilization, infrastructure investment, or reconstruction assistance that flows through the Lebanese state indirectly sustains Hezbollah's political ecosystem. This allows the mechanism of leverage to operate: When the United States escalates sanctions to economically isolate Hezbollah, Lebanon faces financial hardship, and Chinese engagement, whether through trade, humanitarian aid, or prospective infrastructure financing, reduces the severity of isolation, thus Washington must recalibrate pressure to avoid complete state failure, which would open space for deeper Chinese penetration or regional instability. Thus, Hezbollah extracts leverage not by directly bargaining with Beijing against Washington, but by ensuring that Lebanon remains strategically valuable to China. The credible

possibility of expanded Chinese involvement constrains U.S. coercive power. Sanctions become tools of containment rather than elimination. The outcome, which is Hezbollah's continued endurance, constitutes a form of extracted concession.

The clearest illustration of this mechanism occurred during Lebanon's post-2019 financial collapse. As Lebanon's banking sector imploded and the country entered severe economic crisis, the United States intensified sanctions targeting Hezbollah-linked financial networks and individuals (Jewish News Syndicate 2022). In response, Hezbollah leaders publicly articulated an alternative economic orientation. In 2020, Secretary General Hassan Nasrallah urged Lebanon to "look East," and not wait for the West, but instead pursue "real" partnerships that came without political conditions (Vohra 2020). This was not merely rhetorical posturing. Lebanon had already formally joined the Belt and Road Initiative in 2017, Chinese officials had repeatedly expressed interest in expanding economic cooperation, and China's Ambassador to Lebanon had described the country as a "natural partner" in China's development vision (The Beirut 2025). Although large-scale Chinese financing did not immediately materialize, the strategic significance lay in the signaling itself: Lebanon possessed a plausible external partner outside the U.S.-led financial system. In theory, a target's leverage depends in part on its outside options. The more credible the alternative, the weaker the coercer's ability to impose maximal punishment without risking unintended strategic consequences. Hezbollah's "turn East" framing strengthened Lebanon's outside option by embedding its domestic survival within a broader geopolitical competition. If the United States were to escalate from targeted sanctions to comprehensive state-level financial isolation, it would risk accelerating Lebanon's economic diversification toward China. Such an outcome would undermine U.S. influence in the Middle East and potentially expand Beijing's infrastructural and commercial footprint in a strategically

sensitive region. Because of this, the United States consistently avoided comprehensive sanctions on Lebanese state institutions, broad embargoes, or measures that would collapse the entire financial system, rather concentrating efforts on sanctioning Hezbollah individuals and (U.S. Department of Treasury 2025). This pattern of bounded coercion is not simply a product of U.S. concern for Lebanese state stability. It reflects a strategic calculation in which the costs of escalation are shaped directly by China's presence as an alternative partner. U.S. policymakers have explicitly acknowledged the risks of economic overreach in Lebanon in terms that implicate great-power competition. In 2020, U.S. Ambassador to Lebanon Dorothy Shea warned that Chinese investment in Lebanon posed strategic risks, framing Chinese economic engagement not as benign commercial activity but as a geopolitical threat requiring a calibrated U.S. response (Al Arabiya 2020). This framing demonstrates that U.S. officials perceived Chinese engagement in Lebanon as a constraint on their own policy options. Even when Chinese projects remain limited, the credible possibility of expanded engagement functions as bargaining leverage. Further, despite sustained U.S. financial pressure, Hezbollah has neither been disarmed nor politically marginalized. Survival under sustained coercion, combined with continued military autonomy and political influence, constitutes the observable outcome of leverage. By enhancing Lebanon's outside options within an increasingly competitive international system, it raises the costs of unilateral punishment.

The 2026 war between the United States and Iran further reinforces Hezbollah's ability to leverage by demonstrating its role as a strategically important actor within a broader regional conflict. Following U.S. and Israeli strikes on Iran, Hezbollah entered the conflict by launching sustained rocket and missile strikes against Israel (Bachega 2026). These actions transformed the confrontation into a multi-front regional conflict, significantly increasing the risks associated

with further escalation. The United States is involved in a “combined force” strategy with Israel to target Hezbollah, including strikes against Iranian arms industries that supply the group (Institute for the Study of War 2026). China continues to emphasize diplomacy and avoiding direct military involvement in the conflict (Syarif 2026). This divergence reinforces the constraints on coordinated action: while the United States is drawn deeper into military escalation, China remains focused on stability and risk mitigation. As a result, Hezbollah leverages this asymmetry by escalating in coordination with regional allies and increasing the costs of its own suppression. In fact, Rami Abu Hamdan, a Hezbollah parliamentarian, has stated that “Lebanon will be strongly present at the table of any negotiations conducted by Iran,” and that the group is seeking to “shift the balance” through ongoing military operations, signalling that the Lebanese front is now firmly tied to wider regional talks (The New Arab Staff 2026). In this context, Hezbollah’s escalation does not simply intensify conflict, but alters the calculations of both powers. Because the United States is drawn deeper into military confrontation while China remains unwilling to support coordinated escalation, Hezbollah increases the costs of its own suppression and ensures that its role cannot be bypassed in regional negotiations.

Hamas

Hamas, or Harakat al-Muqawama al-Islamiya (“Islamic Resistance Movement”), was founded in Gaza in December 1987 by Sheikh Ahmed Yassin as an offshoot of the Palestinian branch of the Muslim Brotherhood (Robinson and Merrow 2025). Emerging during the First Intifada, Hamas sought to fuse Islamic fundamentalism with Palestinian nationalism while positioning itself as an alternative to the secular, Fatah-led Palestine Liberation Organization. Its 1988 charter emphasized armed struggle as the primary means of liberating Palestine and called

for the destruction of Israel (Robinson and Merrow 2025). Since the 1990s, Hamas' military wing, the Izz al-Din al-Qassam Brigades, has carried out numerous attacks against Israeli targets (U.S. Department of State n.d.b).

In 2006, Hamas won a majority in Palestinian legislative elections, and following violent clashes with Fatah, it consolidated control over the Gaza Strip in 2007. There have been no subsequent elections, and Hamas has since functioned as the de facto governing authority in Gaza, providing social services, maintaining internal security, and overseeing administrative institutions (Robinson and Merrow 2025). Since the outbreak of the Israel-Hamas war in 2023, Israel has targeted and killed multiple senior Hamas leaders, including Ismail Haniyeh and Yahya Sinwar (British Broadcasting Corporation 2025). In response, Hamas has increasingly relied on a decentralized leadership model, with key figures operating both within Gaza and abroad. Much of its political leadership is based in Doha, Qatar, where a small governing committee helps coordinate the organization's external relations and strategic decision-making (Robinson and Merrow 2025). Historically, Hamas has drawn financial support from Palestinian expatriates and private donors in the Persian Gulf. Today, Iran is one of its primary external backers, providing funding, weapons, and military training. Iranian support, often channeled through the Islamic Revolutionary Guard Corps (IRGC), has played a significant role in enhancing Hamas' military capabilities, including technical assistance for rocket production and broader operational training (Robinson and Merrow 2025).

Despite exercising territorial control and governance, Hamas lacks international recognition as a legitimate political actor. Most countries recognize the Palestinian Authority, or the Fatah-controlled government, as the official representative of the Palestinian people and dozens have designated Hamas as a terrorist organization (Robinson and Merrow 2025). This

dual status, as both a governing authority and an internationally isolated militant organization, shapes the constraints and opportunities through which Hamas operates in the international system.

Hamas and the United States

The United States has designated Hamas as a Foreign Terrorist Organization since 1997 (U.S. The Department of State n.d.a) and has maintained a policy of no formal diplomatic contact, extensive sanctions, and efforts to disrupt its financial networks (Hussein 2023). Furthermore, U.S. policy has consistently aligned with Israel, providing military, diplomatic, and political support in conflicts involving Hamas. This position has been reinforced through repeated U.S. vetoes or opposition to resolutions perceived as unfavorable to Israel in international forums, as well as continued military aid and security cooperation. For example, the FY2026 National Defense Authorization Act (NDAA) allocates over \$600 million for defense cooperation (AIPAC 2026), in addition to \$3.8 billion in annual security assistance, making Israel the largest cumulative recipient of U.S. foreign aid and reinforcing long-term strategic support (Masters and Merrow 2025).

In contrast, U.S. policy toward Hamas is explicitly punitive. The Hamas and Other Palestinian Terrorist Groups International Financing Prevention Act mandates sanctions on foreign individuals, entities, and governments that provide material support to Hamas, including financial assistance, weapons transfers, or logistical aid (U.S. House of Representatives 2023). Beyond formal legislation, the U.S. Treasury has repeatedly sanctioned Hamas-linked individuals, charities, and financial networks across the Middle East and beyond, reflecting a broader strategy of economic isolation (Hussein 2023). Additionally, the United States has

sought to limit Hamas' political legitimacy by supporting alternative Palestinian leadership, particularly the Palestinian Authority (Harb 2023). As a result, U.S. strategy toward Hamas is characterized by containment, combining financial pressure and diplomatic exclusion, rather than engagement or negotiation.

Hamas and China

Historically, China has expressed support for Palestinian liberation movements, particularly during the Cold War, when Mao Zedong's government provided arms and training to groups such as the Palestine Liberation Organization, framing their struggle as part of a broader anti-imperialist movement (Sheng 2025). Following Hamas' victory in the 2006 Palestinian legislative elections, China signaled a more pragmatic approach by hosting Hamas officials for diplomatic talks, despite objections from the United States and Israel (Zambelis 2009). In the years since, China has maintained a policy of engagement without formal endorsement: it does not designate Hamas as a Foreign Terrorist Organization and has avoided direct condemnation of the group, while continuing to officially recognize the Palestinian Authority as the legitimate representative of the Palestinian people (Karam 2025).

More broadly, China has positioned itself as a relatively neutral diplomatic actor while advocating for Palestinian reconciliation, repeatedly calling for unity between Hamas and Fatah and, more recently, hosting inter-Palestinian dialogue in Beijing (Al Jazeera 2024b). In February 2025, following a United Nations Security Council meeting, Chinese Foreign Minister Wang Yi reiterated China's support for a two-state solution based on 1967 borders, called for a permanent ceasefire, and urged the United Nations to admit Palestine as a full member (Embassy of the People's Republic of China in the United States of America 2025). While such positions align

more closely with Palestinian political demands, China frames them within a broader emphasis on sovereignty and conflict resolution. This approach reflects China's wider Middle East strategy, which prioritizes non-interference, state sovereignty, and diplomacy rather than direct alignment with non-state armed groups. In addition to diplomatic engagement, China has provided humanitarian assistance to Gaza, including a \$100 million aid commitment announced in 2025 (Permanent Mission of the People's Republic of China to the UN 2025). Although modest compared to Western aid contributions, such assistance reinforces China's visible involvement in the conflict while avoiding direct support for Hamas itself. As a result, China's relationship with Hamas is characterized less by material backing and more by political accommodation, providing the group with limited but meaningful international space in contrast to its isolation by Western powers.

Leveraging Great Power Competition: Escalation and Engagement

The most significant demonstration of the leverage mechanism by Hamas occurred following Hamas' October 2023 attack on Israel and the subsequent war in Gaza. The scale of the conflict forced immediate and sustained engagement from both the United States and China in sharply distinct ways. The United States provided extensive military and diplomatic support to Israel, including the deployment of two aircraft carrier strike groups to the Eastern Mediterranean, the provision of emergency military aid such as precision-guided munitions and Iron Dome interceptors (Copp 2023), and the use of its veto power in the United Nations Security Council to block resolutions calling for an immediate ceasefire, reaffirming its commitment to Israeli security (Amnesty International 2025). At the same time, China positioned itself as a diplomatic counterweight, calling for an immediate ceasefire, supporting Palestinian

statehood, and criticizing what it framed as disproportionate use of Israeli force, stating Israel's actions have gone "beyond the scope of self defense" and describing them as collective punishment (Rumley 2023). This divergence created a fragmented international response in which Hamas, despite being isolated by Western powers, remained central to diplomatic discussions in international forums, including ceasefire negotiations and United Nations debates.

Hamas benefits from this fragmentation by ensuring that its suppression remains geopolitically costly. In a unipolar system, great-power pressure might enable comprehensive isolation. However, in a competitive environment, China's refusal to fully align with U.S. policy weakens the effectiveness of such efforts. By not designating Hamas as a terrorist organization and by maintaining engagement with Palestinian actors, China contributes to a less cohesive international front. This allows Hamas to retain political space, even in the absence of formal recognition or direct support.

At the same time, Hamas actively generates regional instability in ways that heighten the strategic risks of escalation for major powers. The 2023 war not only triggered a large-scale Israeli military response but also raised the possibility of broader regional conflict involving Hezbollah, Iran, and other actors. This escalation risk compelled sustained U.S. diplomatic and military engagement aimed at preventing further spillover, while China simultaneously increased its diplomatic activity in international forums. In this context, efforts to decisively eliminate Hamas carry risks that extend beyond the group itself, including regional war, disruption of strategic alignments, and increased great-power competition in the Middle East.

The clearest example of Hamas' use of leverage can be seen in its role within diplomatic negotiations, where the United States and China have adopted distinct approaches. In July 2024, China hosted senior Hamas and Fatah officials in Beijing to facilitate reconciliation talks,

culminating in the “Beijing Declaration,” which called for Palestinian unity and the formation of an interim national government to govern both Gaza and the West Bank (Al Jazeera 2024c). This initiative reflects China’s broader effort to position itself as a mediator in the conflict while expanding its diplomatic influence in the Middle East. At the same time, Chinese officials have openly criticized U.S. policy in international forums, arguing that Washington’s repeated vetoes have obstructed ceasefire efforts and prolonged the conflict, stating, “the U.S. has once again single-handedly exercised its veto, paralyzing the Security Council and preventing it from taking the necessary actions to promote a ceasefire in Gaza. On the question of Palestine, the abuse of the veto by the United States is totally unjustified” (Ministry of Foreign Affairs of the People’s Republic of China 2024).

In contrast, the United States has historically refused to engage directly with Hamas, maintaining a strict policy of diplomatic isolation. However, this position has shown signs of flexibility. In January 2025, the United States held their first ever direct talks with Hamas in Doha, Qatar, marking a major shift away from relying on intermediaries. The focus of these talks was the release of American-Israeli hostages (Bashir and Lonsdorf 2025). While the immediate trigger was the release of American-Israeli hostages, the terms and limits of U.S. engagement were shaped by the broader diplomatic environment in which China had already legitimized Hamas as a negotiating partner. In March of 2026, the United States again met directly with Hamas leaders to discuss the group’s disarmament, and so far, Hamas has refused U.S. proposals (Magid and Ayyub 2026). These interactions mark a significant departure from long-standing U.S. policy and illustrate how Hamas’ actions, particularly its capacity to generate large-scale conflict and hostage crises, can compel engagement even from actors that formally refuse recognition. This dynamic is further illustrated by statements from Hamas officials indicating

that “nothing is off the table” in discussions with the United States, suggesting an expansion of negotiations beyond hostage-related issues (Bashir and Lonsdorf 2025). This shift highlights Hamas’ ability to move from isolation to conditional engagement, shaping discussions and reinforcing its role as an unavoidable actor despite its formal designation as a terrorist organization.

Taken together, these dynamics illustrate how Hamas leverages great-power competition by exploiting the tension between U.S. policy objectives and geopolitical constraints. While the United States is historically unwilling to engage with groups it deems terrorists, Hamas’ ability to generate hostage crises and large-scale conflict forces Washington to engage when its strategic interests are directly implicated. The January 2025 and March 2026 talks demonstrate that, under conditions of escalation, the United States is willing to depart from its stated policy in order to secure hostages and manage regional stability. This constitutes a tangible benefit for Hamas: direct engagement with a major power that otherwise refuses recognition, as well as the ability to shape negotiations and reject proposals without being bypassed. This dynamic ultimately contributes to Hamas’ survival. Although Israel has repeatedly pledged to dismantle the group, Hamas’ ability to compel engagement from the United States increases its likelihood of remaining a central political actor in Palestinian politics. In this sense, survival itself becomes a form of leverage, as great-power competition constrains the feasibility of its complete elimination.

Although Hamas cannot directly “pivot” to China in the same way as more institutionally embedded actors, it nonetheless engages in strategic signaling that highlights alternatives to U.S.-dominated diplomatic frameworks. By aligning its rhetoric with broader narratives of anti-imperialism and resistance, historically resonant with Chinese foreign policy discourse,

Hamas positions itself within a global political context that extends beyond Western-defined legitimacy. At the same time, China's willingness to include Hamas in diplomatic initiatives and advocate for Palestinian political unity reinforces this dynamic by preventing the emergence of a unified international strategy of isolation. Rather than fully aligning with U.S. containment efforts, China incorporates Hamas into diplomatic negotiations and conflict resolution. As a result, Hamas is able to operate within a multipolar international environment in which major powers pursue competing approaches. This fragmentation increases the costs of coordinated action against Hamas and ensures that it remains an unavoidable actor in both crisis negotiations and longer-term diplomatic processes.

Discussion of Findings

The findings of this thesis provide strong support for the central hypothesis that politically and militarily oriented non-state actors that engage both the United States and China are more likely to extract diplomatic, economic, or political advantages than those that do not. In the case of the Houthis, blockading the Red Sea and selectively targeting U.S. and Western vessels while permitting Chinese ships to pass freely, engineered a wedge between the two great powers. When the United States and China are unable to coordinate a unified response, the Houthis effectively neutralize the threat of two major powers acting in unison against them. China has little incentive to join American-led pressure campaigns against a group that is accommodating Chinese interests, meaning the Houthis can absorb U.S. pressure without facing comprehensive, multilateral isolation. This division forces the United States into a weakened negotiating position, as any coercive power Washington attempts to apply is undermined by the assumption that Beijing will not follow suit. This means the Houthis can make demands, sustain

their campaign, and resist concessions with far greater confidence than a group facing consolidated great-power efforts. Moreover, by demonstrating control over a critical maritime chokepoint, the Houthis transcended their identity as a local insurgency. They became actors that major powers could not ignore, forcing their way into regional and global policy calculations on their own terms. In the case of Hezbollah, their leverage of economic partnerships and signaling towards China provided political and economic advantages by creating credible alternatives to U.S.-led financial pressure. By positioning Lebanon within China's economic sphere, Hezbollah constrains the effectiveness of U.S. sanctions, as Washington must balance coercion against the risk of further destabilizing Lebanon or pushing it toward greater Chinese engagement. This dynamic allows Hezbollah to preserve its political influence and military autonomy while avoiding complete economic isolation, demonstrating how engagement with a rival power can limit the scope of coercive strategies and sustain the group's long-term survival. In the case of Hamas, their ability to generate large-scale conflict and hostage crises has forced direct negotiations, marking a departure from longstanding U.S. policy. At the same time, China's willingness to include Hamas in diplomatic initiatives and refrain from full alignment with U.S. containment efforts ensures that the group retains political space in international forums. This dynamic allows Hamas to maintain relevance, shape negotiations, and secure limited forms of recognition despite its formal designation as a terrorist organization.

This thesis also provides evidence for H1, though with important variations across cases. In both the Hezbollah and Houthi cases, signaling engagement with China, whether through economic alignment or selective accommodation of Chinese shipping, strengthened these actors' external options and constrained U.S. coercive pressure. Hezbollah's "turn East" strategy and the Houthis' deliberate sparing of Chinese vessels both demonstrate how behavioral signals directed

at one great power can raise the costs of isolation by another. Hamas also provides support for H1, though in a more limited form. Chinese diplomatic engagement, particularly through the Beijing Declaration and China's consistent refusal to designate Hamas as a terrorist organization, partially offset U.S. exclusion efforts. The clearest evidence of H1 operating in the Hamas case is the January 2025 direct talks in Doha, the first time the United States engaged Hamas directly rather than through intermediaries. This shift occurred in a diplomatic context that China had helped construct: by hosting Hamas in Beijing, advocating for its inclusion in Palestinian governance discussions, and publicly criticizing U.S. vetoes, China had already established Hamas as a legitimate negotiating party before Washington came to the table. The U.S. decision to engage directly, even if driven primarily by hostage recovery, constitutes a measurable concession from a power that had maintained absolute exclusion for decades. Hamas did not pivot to China in the way the Houthis spared Chinese shipping, but China's engagement raised the costs of U.S. exclusion sufficiently to produce a behavioral change in Washington.

The findings also provide strong and consistent support for H2. Across all three cases, the most durable source of leverage derives from the capacity of non-state actors to generate instability that imposes geopolitical costs. The Houthis' disruption of Red Sea shipping imposed direct economic costs on the global trading system, forced the United States into costly and ultimately inconclusive military operations, and created conditions under which China could contrast its restrained diplomatic posture with Washington's military escalation. Despite significant U.S. firepower, including B-2 bomber strikes against underground Houthi facilities, the group was never decisively neutralized, and the May 2025 ceasefire, which the United States accepted without securing Houthi disarmament or a halt to attacks on Israeli-linked shipping, reflects the limits that H2 leverage imposed on Washington's coercive options. Hezbollah's case

also illustrates this dynamic. Its ability to open a second front against Israel, demonstrated during the 2023 war and again during the 2026 Iran conflict, meant that any effort to suppress it militarily risked triggering a regional escalation that neither the United States nor China could easily contain. This escalation risk functioned as a constraint: the costs of elimination encompassed the stability of Lebanon, the security of Israel's northern border, and the broader trajectory of the U.S.-Iran conflict. Hamas demonstrates H2 most significantly. Its ability to trigger the largest Gaza war in history, drawing in Hezbollah, straining U.S.-Israeli coordination, and forcing sustained great-power engagement in international forums, transformed a besieged governing authority into an actor that neither Washington nor Beijing could ignore.

Taken together, these findings refine the initial theoretical framework. While engagement with competing great powers enhances leverage by expanding outside options, it is most effective when combined with the capacity to generate meaningful strategic risk. Non-state actors that can both signal alternative alignments and impose costs on great powers are best positioned to extract concessions. At the same time, leverage remains contingent and uneven. It does not produce consistent policy reversals, but rather more subtle forms of adjustment, including selective engagement, bounded coercion, and recognition.

H2 proves more robust than H1 for a structural reason: whereas signaling alternative alignments depends on the existence of a receptive great power and a credible outside option, conditions that vary across cases, the capacity to generate strategic risk is more directly within a non-state actor's own control. An actor that can credibly threaten regional escalation or economic disruption does not need to rely on another power's willingness to engage, it creates leverage through the costs it can impose, regardless of the diplomatic environment. This suggests that in great-power competitive environments, coercive capacity and geographic positioning are more

reliable foundations for leverage than diplomatic signaling alone, though the two pathways are most effective when operating in combination

More broadly, these findings challenge state-centric assumptions in international relations by demonstrating that non-state actors are not merely shaped by great-power competition, but actively structure it. This conclusion has direct implications for how the existing literature frames both great-power rivalry and non-state actor behavior. Scholarship on U.S.-China competition has largely treated the Middle East as an arena in which states compete over influence, with non-state actors appearing primarily as variables to be managed rather than agents capable of shaping the international environment. The cases examined here complicate these assumptions. The Houthis did not wait to be armed and directed, they constructed a maritime strategy that forced both Washington and Beijing to respond. Hezbollah did not merely receive Chinese economic engagement, it actively promoted that engagement as a political counterweight to U.S. pressure. Hamas did not simply benefit from Chinese diplomatic cover, it participated in internationally visible processes that altered the diplomatic context in which U.S. policy operated. In each case, the non-state actor was a participant in shaping the structure of great-power competition, not merely its object. As U.S.-China rivalry intensifies and extends across more regions and domains, this dynamic is likely to become more pronounced rather than less. Non-state actors with the capacity to impose costs and signal alternatives will find increasingly viable options for leverage. Accounting for this possibility requires moving beyond state-centric frameworks and toward an understanding of international competition in which agency is distributed unevenly and not exclusively among states.

Conclusion

This thesis set out to answer a question that existing scholarship has largely neglected: how do politically and militarily oriented non-state actors in the Middle East leverage U.S.-China great power competition? Through case studies of the Houthis, Hezbollah, and Hamas, this research has demonstrated that non-state actors are not passive recipients of great-power pressure, but active participants capable of shaping international dynamics. By leveraging asymmetries in U.S. and Chinese strategic priorities, these actors have extracted benefits, such as diplomatic visibility, survival, direct engagement, and infrastructure investment, which would have been far less attainable in a more unified international system.

This thesis also sheds light on the idea that great-power competition creates conditions that non-state actors can leverage. When the United States and China pursue distinct strategies toward the same region, the coherence of coercive pressure diminishes, outside options become more credible, and the costs of suppression rise. Second, this thesis also demonstrates that the capacity to generate strategic geopolitical risk is the most robust pathway to leverage. Across all three cases, the ability to impose geopolitical costs, through maritime disruption, regional escalation, or large-scale conflict, proved more effective than diplomatic signaling alone. Third, leverage does not uniformly produce policy reversals or formal concessions, but rather more subtle adjustments, such as toleration, limited coercion, selective engagement, and inclusion in diplomatic processes that formal designation as terrorist organizations would otherwise preclude.

These findings carry implications for U.S. policy. Washington's current approach to all three actors relies heavily on financial coercion, diplomatic isolation, and military pressure. These tools retain value but their effectiveness is limited in a competitive international environment. Sanctions regimes designed to isolate non-state actors depend on broad

international coordination that China is unwilling to provide. Military campaigns intended to eliminate groups like the Houthis have repeatedly failed, and diplomatic exclusion policies, such as the longstanding refusal to engage Hamas directly, have proven unsustainable when the costs of non-engagement, such as prolonged hostage crises, exceed the costs of limited contact. A more effective U.S. approach would account for the ways in which great-power competition amplifies non-state actor leverage, rather than treating these domains as separate. This does not mean abandoning pressure strategies, but it does mean calibrating them with greater awareness of the competitive environment in which they operate.

For China, the findings reveal both the benefits and the limits of its current posture. Beijing has consistently reaped low-cost advantages from U.S.-non-state actor conflicts: continued access to energy flows and trade routes, a contrast between its restrained diplomatic engagement and Washington's more costly military involvement, and growing influence in regional diplomatic processes. However, this posture also exposes China to risks it has not fully reckoned with. As the 2026 Iran conflict illustrates, regional escalation driven by non-state actors can rapidly threaten the energy flows and trade routes on which China's economy depends. China's emphasis on stability and non-interference does not insulate it from the consequences of conflicts. As Beijing's regional presence deepens through Belt and Road investments, infrastructure projects, and diplomatic initiatives, its stake in regional security will grow correspondingly, and its ability to remain a passive beneficiary of U.S.-non-state actor conflict will diminish.

This thesis has several limitations that future research should address. The case selection is concentrated in the Middle East and focused on actors with established relationships with both the United States and China. It remains an open question whether the leverage mechanisms

identified here operate similarly in other regions, such as Sub-Saharan Africa or Southeast Asia, where U.S.-China competition is intensifying and non-state actors also exercise significant influence. Additionally, the reliance on open-source qualitative data introduces constraints. Direct evidence of strategic coordination between non-state actors and great powers is rarely available in the public record, and the inferential steps required to connect observable behavior to underlying intent are significant. Future research might address this limitation through leaked diplomatic communications or an analysis of cases where non-state actor leverage clearly failed, which would allow for more rigorous testing of the conditions under which the mechanisms identified here hold.

The actors examined in this thesis, a Yemeni insurgent group that brought global shipping to a standstill, a Lebanese political party that has outlasted decades of sanctions, and a Palestinian militant organization that compelled direct negotiations with the world's most powerful state, share one common trait: they refused to be managed on others' terms. Their survival and continued relevance is not simply a product of Iranian backing, geographic positioning, or ideological appeal. It is, in part, a product of their ability to read a competitive international environment and act within it strategically. As U.S.-China rivalry deepens and extends into more regions, more non-state actors will find themselves operating within similar structural conditions. Policymakers in Washington and Beijing who continue to treat non-state actors as problems to be managed, rather than as participants who shape the very competition they are caught within, will find themselves repeatedly surprised by the limits of their own leverage.

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