



# Ending the Houthi Threat to Red Sea Shipping

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## Key Points

- Houthi attacks on shipping in the Bab el-Mandeb and Red Sea represent both an immediate threat to vital American interests in free trade and global commerce and a more general threat to American allies and interests in the Middle East.
- American air and missile strikes have somewhat diminished the frequency and lethality of Houthi attacks but appear unlikely to end the attacks altogether. Both Iran and the Houthis themselves gain a tremendous amount by demonstrating the Houthis' ability to employ Iranian weapons to interfere with and potentially shut down shipping in the region. Moreover, the Houthis weathered years of Saudi and Emirati air strikes without changing their behavior.
- The United States and its allies will have to put at risk something more valuable to the Houthis than what they gain from these attacks on shipping. The only thing that meets that threshold is Houthi control of Yemeni territory, which the Houthis have demonstrated they will make sacrifices to retain.
- Consequently, the United States should begin to arm, train, equip, and otherwise support the internationally recognized government of Yemen in its ongoing conflict with the Houthis to take back conquered lands from them. Doing so would not require US ground troops in Yemen, would likely be extremely popular with the vast majority of the population of Yemen and America's regional allies, and would end further Houthi aggression in the Middle East.

Once again, the United States confronts an unexpected threat in the Middle East—this time, from the Houthis of Yemen, who have chosen to take their war against the government of Yemen out into the Red Sea to try to strangle the 12 percent of global shipping that flows through the Bab el-Mandeb.<sup>1</sup> The Houthis are ostensibly doing this in support of Hamas, but in reality, it is in pursuit of their wider ambitions in Yemen and the region and on behalf of their Iranian allies.

Once again, Americans are asking what is the least we can do to address this threat. Unfortunately, as we should have learned over the past 45 years, trying to do the least in the Middle East often means we end up having to do the most. A smart, feasible middle course is

available to the United States and its allies, but it will require us to recognize that the United States has a real stake in the outcome of the Yemeni civil war and that that interest lies with ensuring the Houthis do not prevail. While it will require important changes from how we have tackled the problem so far, the best news is it should not require American boots on the ground in Yemen and is likely to be welcomed by most Yemenis and all of our allies in the Middle East.

Washington warned, punished, and warned the Houthis again against drone and missile attacks on vessels transiting the Red Sea. Instead of stopping after joint US-UK strikes on Houthi targets in January, the Houthis escalated, including by launching one of their

most complex attacks to date and increasingly focusing on US-owned vessels.<sup>2</sup> They vowed to respond to a third round of joint US-UK strikes on February 3 that targeted “deeply buried” Houthi military capabilities.<sup>3</sup> The Houthis remain undeterred and, in fact, are emboldened in the face of international pressure to back down.

Continued strikes targeting Houthi weapons caches and military sites are unlikely to change the Houthis’ behavior or the power imbalance; they weathered years of Saudi and Emirati air strikes and emerged the strongest power in Yemen. Since by all appearances the joint US-UK strikes on Houthi sites seem unlikely to stop the Houthi attacks, Washington will have to do more and better.

The Houthis’ ability to disrupt commercial shipping through an essential maritime choke point and therefore hurt the global economy threatens US national security interests. Operation Prosperity Guardian, the multinational maritime task force announced on December 18 in response to the Houthi threat, seeks to protect ships from attacks by increasing the presence of naval assets in the waterway to better aid and defend commercial vessels transiting the Red Sea. Yet even with the patrols, the Houthis continued to launch attacks on cargo ships in the Red Sea and then expanded their attacks to the Gulf of Aden.<sup>4</sup> Houthi anti-ship ballistic missiles struck the M/V *Gibraltar Eagle* in the Gulf of Aden on January 15 and the M/T *Zografia* in the Red Sea on January 16, and a Houthi one-way attack drone struck the M/V *Genco Picardy* on January 17 in the Gulf of Aden.<sup>5</sup> The Houthi attacks have driven many major commercial shipping companies to divert their cargo ships around the cape of Africa, delaying delivery and increasing costs.

Yet while Washington prioritizes stopping Houthi attacks on shipping in and around the Bab el-Mandeb, the Houthis also present longer-term challenges to US strategic interests through their destabilizing role in Yemen and actively growing role in Iran’s Axis of Resistance. The Houthis’ power grab in September 2014 sent Yemen spiraling toward civil war and sparked the Saudi and Emirati military intervention in Yemen in 2015. The Houthis have exploited UN and other mediation efforts to further extract concessions from their adversaries, be it the internationally recognized Yemeni government or Saudi Arabia, while giving up little to nothing in exchange. Moreover, their relationship with Iran

and its regional proxies has only deepened, expanding Iran’s malign influence. Even if repeated strikes targeting Houthi military sites were to stop their maritime attacks today, the Houthis will remain a strategic threat so long as they are a significant power in Yemen.

## The Current Situation

Since November 19, the Houthis have launched dozens of drone and missile attacks on maritime trade in the Red Sea and the Gulf of Aden under the pretext of support for Palestinians. Their actual objectives, however, have to do more with strengthening their own position than anything involving the Palestinians.

The Houthis have used their maritime attacks and the international response to bolster their declining domestic support by rallying Yemenis against a common external enemy and leveraging pro-Palestinian sentiment to advance mobilization and recruitment. During the truce that has informally held since April 2022 in Yemen, the Houthis’ failure to prioritize service delivery and civil-servant salary payments and their increasing restrictions on civil liberties—particularly for women—chipped away at their support base. No longer could the Houthis deny the public their many rights under war-mobilization slogans blaming all of Yemen’s ills on “the Saudi-led coalition” or “the US and Israel.”

The Houthis are an ideologically driven armed movement whose leaders share Iran’s revisionist vision for the Middle East. As Zaydi monarchists, they claim that descendants of the Prophet Muhammad have an exclusive right to rule the Muslim nation. They have also embraced Iran’s revolutionary model. Their goal is to establish a theocracy in Yemen and build a Muslim army for what they term the “Battle of Promised Conquest and Holy Jihad.” Aligned with Iran and its Axis of Resistance, their ideological framework seeks to remove the United States from the Middle East, dismantle Israel, and institute a global Islamic government with Jerusalem as its capital.

The UN-mediated truce that started in April 2022 marked a major shift in Houthi military focus from the ground campaign aimed at seizing control of Marib city and nearby oil and gas facilities to naval warfare. Like the Stockholm Agreement in late 2018, which prevented forces backed by the United Arab Emirates from ejecting

the Houthis from the Red Sea coast and allowed the Houthis to redeploy ahead of the Marib campaign, the April 2022 truce gave the Houthis breathing room from Saudi air strikes and Saudi- and UAE-backed ground forces in and around Marib to regroup and refocus on naval military capabilities.

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## **The United States cannot afford to do nothing. The Bab el-Mandeb is one of the world’s most critical maritime choke points.**

It was almost certainly a question of when, not if, the Houthis would contest the waters surrounding Yemen. While they framed their renewed focus on the sea war as a response to the formation of Combined Task Force 153,<sup>6</sup> created in April 2022 to help secure the Red Sea, the Bab el-Mandeb, and the Gulf of Aden, it was actually the UN-negotiated truce that triggered this move. International navies had been patrolling the Red Sea, the Bab el-Mandeb, and the Gulf of Aden for years. Before the truce, the Houthis had to prioritize most of their military resources into relentless ground offensives, seizing and defending new territory in the Sana’a, al-Jawf, al-Bayda, Shabwah, and Marib governorates between January 2020 and the April 2022 truce. Saudi air strikes also limited the Houthis’ freedom of movement. With air and land threats at bay thanks to the truce, the Houthis shifted attention toward building up defensive and offensive sea power. Moreover, their inability to take Marib gave the Houthis an incentive to try to make military gains elsewhere to maintain the impression of unstoppable momentum and inevitable victory.

The Houthis did not hide their investment in maritime capabilities. Less than five months into the truce, on September 1, 2022, Houthi President Mahdi al-Mashat announced at a massive military parade in Hodaydah city that the group “can now strike any point in the sea from anywhere in Yemen.”<sup>7</sup> This parade, which

the UN stated was in violation of the Stockholm Agreement,<sup>8</sup> was followed by an even larger military parade in Sana’a on September 21,<sup>9</sup> at which the group unveiled other advanced naval weapons including the “Robej” and two “Bab el-Mandab” missiles, all of which are replicas of Iranian missiles. A few weeks later, the Houthis followed through on their maritime threats and launched drones and missiles at international ships at government-controlled oil terminals after refusing to renew the six-month-old truce. Yemen’s oil exports (and the revenue they generated for the government) have been cut off ever since. For the next year (and before the start of the Gaza war on October 7, 2023), the Houthis were busy on the Red Sea coast installing radars and moving missiles with the assistance of Islamic Revolutionary Guards Corps (IRGC) Quds Force advisers, conducting piracy simulation exercises, and planning military drills on Houthi-controlled islands.<sup>10</sup>

The depth and extent of arms caches on the Red Sea coast and elsewhere in Houthi-held areas remain largely unknown. Meanwhile, Iran continues to supply the Houthis with advanced missile components and other weapons that are not commercially available,<sup>11</sup> and domestic production of less advanced weapons has developed to the point where the Houthis no longer require Iranian inputs.

The US and allies now find themselves in a precarious position in which continued mismanagement of the Houthi threat represents a sword of Damocles hanging over Red Sea shipping lanes, with the power to ignite a regional conflict.

### **The Way Forward**

What’s become clear is that even after multiple administrations have tried to minimize the fallout from the Houthis’ rise to power, the civil war, and the Saudi and Emirati military intervention, the United States still has no clear vision for what a good resolution for Yemenis could—or should—be beyond simply stopping the current fighting and extricating Saudi Arabia from the problem.

What also should be clear is the United States cannot afford to do nothing. The Bab el-Mandeb is one of the world’s most critical maritime choke points. For Europe, it is a vital pathway for Gulf oil shipments, which have become even more important since the Ukraine war

started. The disruption of the flow of goods through the Red Sea has already affected the global economy. The Houthis will interpret the lack of a US response as a victory and continue onward with their millenarian project in Yemen.

The calls to target Iran as the Houthis' primary sponsor mistake a mutually beneficial relationship for one of direct control. Iran is almost certainly enabling the Houthi attacks: An Iranian cargo ship, the *Behshad*, long positioned in the Red Sea as a floating intelligence headquarters for the IRGC, relocated to the Gulf of Aden the day before the first wave of US-UK air strikes on Houthi targets. Iran and the Houthis simply share the same revisionist principles and near-term objectives of pushing the United States out of the Middle East and eliminating Israel.

True, the Houthis would not be where they are today without Iran. IRGC investments in the Houthis helped transform the group from a ragtag guerrilla group to an actor operating on the global stage. Specifically, the Houthis benefit from IRGC-supplied arms and weapons, military training, support, and advising. But the IRGC has also transferred expertise and aided the development of local capacity to manufacture weapons. And Houthi members are now actively involved in procurement networks for these weapons—many of which can be produced through commercially available technology.

Moreover, the Houthis are reaping the benefits of these attacks on Red Sea and Gulf of Aden shipping. Before October 7, the Houthis faced increasing domestic opposition. The end of regular Saudi air strikes eliminated the external enemy that had inflated their popularity. Now, styling themselves as defenders of Palestinians and a resistance against Israel and the United States, the Houthis again have rejuvenated their domestic base. Outside of Yemen, they are asserting themselves on the global stage and baiting the United States and its partners to react.

While air strikes are unlikely to stop Houthi attacks on shipping through the Bab el-Mandab—and actually play domestically in their favor—the Houthis respond to power and, more specifically, to threats to their own power. Controlling Yemen and consolidating their position at the top are the only things they care about.

They proved as much in 2018 when an Emirati-led offensive up the Red Sea coastline threatened their

control of the strategic port city of Hudaydah. The Houthis rushed to the negotiating table to prevent a military defeat and walked away with an agreement that left Hudaydah under their control. The agreed-upon plan to transition administration of the port to a neutral third party has yet to be implemented. Similarly, in early 2022, after Yemeni factions had launched a counteroffensive against the Houthis in late 2021, the Houthis announced a unilateral cease-fire that became a negotiated truce. Yet even while participating in talks, the Houthis continued to build their military strength, graduating youth through military training camps and deploying them to the front lines.

Thus, the way to change the Houthis' behavior is to threaten that which they hold most dear: their control of Yemen.

## Policy Recommendations

The United States should begin fully supporting the government it recognizes in Yemen and providing it with the necessary means to win against the Houthis. Weakening the Houthis within the context of the civil war is the only way to prevent them from further consolidating their position as the power broker in Yemen and projecting more power abroad, including in the maritime domain. And only when they are under direct threat and in a losing position will the Houthis—and perhaps the Iranians—rethink their current behavior.

Focusing on the Houthis rather than Iran, which is a significant driver of much of the instability in the Middle East, ultimately affects Iranian calculations as well. Despite the Houthis' debatable level of autonomy, Iran perceives them as a tool to advance its own regional policies and uses them as such. Taking the Houthis out of the equation changes Iran's calculations and limits what it can do regionally, particularly in the Red Sea and the Gulf of Aden.

This approach faces several obstacles, including ones introduced by previous US policy decisions and the reality that the Yemeni government is far from an ideal partner. Competing interests among Yemeni government factions have ultimately undermined efforts to make real progress against the Houthis—although the Saudi coalition and US leaders also restrained government military advances against the Houthis at critical points during the war. Government stakeholders do not

share a unified vision for what the division of power should be but can be pushed by the common perception of threat and the change in international mood. Few of the various military forces fighting against the Houthis are professionalized forces, and repeated efforts to integrate command and control have failed. Yet they and they alone remain dedicated to combating the Houthis and have very real interests in winning against them, not least given the nature of the Iranian-backed Houthi project on the Red Sea.

Moreover, US officials' public criticism and withholding of US support for the Saudi and Emirati military intervention in Yemen will color how these natural partners engage. Neither country is likely to jump at the chance to support the United States against the Houthis after having sought such support for themselves in the very same effort for years. Furthermore, lacking any guarantees that the United States will remain committed in Yemen or even other areas of the Middle East in the coming years, both are likely to hedge their bets.

The following is a list of policy recommendations the US government should pursue.

#### **Provide Military Support to the Yemeni Government.**

This support should not be in the form of US troops fighting in combat roles or any significant deployment to Yemen or the region; rather, it should be covert weaponry and training focused on developing critical capabilities and providing enablers to give the Yemeni Armed Forces the edge they need against the Houthis. American support could be conditioned on Yemeni government progress toward unifying the command and control of anti-Houthi forces under state institutions. Elements of this military support will probably include:

- Military equipment appropriate for the Yemeni battlefield;
- Commercially sourced technology to improve targeting, such as products that will enable the Yemeni forces to identify and geo-locate specific radio frequencies;
- Limited military training to develop specialized skills in certain units;

- Advice and assistance with strategic and operational planning; and
- Possible US air support to anti-Houthi ground operations.

Although some advanced systems (such as modern anti-tank guided missiles) could be beneficial, the Yemeni civil war has largely been waged with 1950s-era Soviet weaponry on both sides, and appropriate military equipment should make up the bulk of American weapons deliveries to the anti-Houthi forces.

#### **Interdict and Disrupt Iranian Support to the Houthis.**

Limiting Iran's ability to support the Houthis will reduce the Houthis' ability to recover from military setbacks and respond.

- Sustain counter-smuggling efforts in support of the UN arms embargo, consistent with UN Security Council Resolution 2216 (2015). Iran has continued to move arms and weapons to the Houthis, as evidenced by the recent interdiction of advanced conventional weapons.<sup>12</sup> Moreover, certain components of more sophisticated weapons, such as the Shahed series unmanned aerial vehicle, must be sourced from Iran or China.
- Disrupt the transmission of IRGC signals from the *Behshad*. Assuming that the IRGC is actively supplying the Houthis with intelligence for targeting, US military forces should block the signals or disrupt them via other possible means.
- Render Iranian-sourced arms components ineffective. If the opportunity presented itself, sabotaging Iranian-sourced technology by either software or hardware modifications could reduce Houthi confidence in the accuracy or effectiveness of these weapons.
- Support the Yemen Coast Guard to enhance patrols of Yemeni territorial waters and limit Houthi maritime activity by providing vessels, training, and other forms of assistance.

**Contest the Houthis' Narrative of the War as Being One Against Foreign Influence.** The Houthis have silenced opposition voices and sought to unite a domestic base by blaming external actors.

- Amplify local, anti-Houthi voices, including in areas under Houthi control and the diaspora. Yemeni voices can provide legitimate counters to Houthi narratives.
- Declassify intelligence on Iran's and Lebanese Hezbollah's role in the conflict. The Houthis actively mask their reliance on external support, despite attacking the recognized Yemeni government for its relationships with Gulf Arab states.

**Sustain US Diplomatic Engagement and Support for the UN-Led Effort to Negotiate a Settlement.** Continuing diplomatic engagements ensures that back channels remain open for when the time for negotiations is right.

- Build out track-two dialogues to lay foundations for aspects of a future peace process, including security-sector reform and disarmament.

**Levy Sanctions Against Houthi Members and Their Supporters to Sustain Economic Pressure Where Possible.** Expand sanctions to include Houthi financing networks managed from elsewhere in the region.

## About the Authors

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