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The Red Sea crisis. Analysis from a maritime dimension

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Abstract:

The crisis in the Red Sea, a consequence of the Houthis attacks with drones and ballistic missiles on ships crossing the Bab el-Mandeb strait, is having a strong impact on world shipping and maritime trade, causing that many of them change the route, sailing south of Good Hope around Africa and therefore avoiding this territory. This situation has an important economic and commercial impact, which also contributes to further straining the already delicate geopolitical situation in the Middle East region.

The crisis has two main implications. On the one hand, it has an important negative impact on economics and trading, particularly for Europe and Southeast Asia, since the Red Sea is the route linking the two regions, through which most commercial trade navigates. It has also a serious impact on the countries of the region, which are dependent on this maritime shipping and economically weaker and more vulnerable. However, the maritime trade and shipping companies are showing solid resilience as well as the ability to adapt themselves to the situation, which means that this crisis, although serious, is not critical.

From a geopolitical perspective, the crisis opens an additional dimension, in the already complex regional chessboard, with Iran and its proxies, in this case the Houthis of Yemen, very active in their struggle against the influence of the West and against Israel.

It is possible that this maritime crisis continues over time, because it depends much more on the will of the Houthis to continue with the attacks than on the ability of the international community, particularly the West, to prevent them.

Its impact, both at the economic and commercial level, as well as on regional geopolitics, although relevant, is not foreseen to be decisive

Keywords:

Red Sea, Maritime shipping, Houthis, Economic impact, World trade, Europe, Suez Canal, Shipping routes, Middle East, United States, Israel, Iran.

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Introduction

From a geographical perspective, the Red Sea is a virtually enclosed sea, almost a large saltwater lake, just over 2,000 km long north-south, just over 300 km wide at its widest point and covering an area of 450,000 km²¹. It is therefore a small sea with very restricted access (it has only two entrances: the Suez Canal in the north and the Bab el-Mandeb Strait in the south), but it is a key route for world maritime traffic and trade, for communication between Europe, Southeast Asia and the Middle East². It should also be noted that it is also an area through which the submarine cables linking Europe and Asia pass.



¹ Similar in size to the Black Sea and about one-sixth the size of the Mediterranean.

² Both for trade in goods and raw materials with Southeast Asia and in energy with the Persian Gulf.

The Red Sea carries around 12% of global maritime trade by volume, rising to 30% in the case of container traffic. In terms of oil, around 30 % of the world's crude oil transported by sea passes through its waters. The city of Jambu on the Saudi Red Sea coast is worth mentioning, where the sea terminal of the East-West pipeline is located (map 2), which crosses the Arabian Peninsula and links this port with the Ghawar oilfields, considered the largest oilfield in the world, which from an energy point of view emphasises its importance.



It is not the purpose of this paper to analyse the geopolitical situation in the region, but rather to focus on one of the pieces of this complex chessboard that is acquiring great relevance: the Red Sea crisis.

However, in order to understand this crisis, we must take into account the tensions between the various regional powers seeking to exert their influence in the region; Iran with its clear support for the Houthi rebels in Yemen, Saudi Arabia, the Gulf states, as well as the major external powers.

Considering that the regional geopolitical framework is already addressed in another chapter of this book, we will focus our analysis essentially on the maritime dimension of this crisis, its impact on transport and maritime trade at the global and regional level, and its economic consequences, all of which affect both regional actors and global powers (the US, Russia, China and the EU itself).

The Red Sea has traditionally been a safe and stable maritime space³, with calm waters. It bathes the coasts of eight states: Egypt and Saudi Arabia, important players at the regional level, which coexist with Yemen, Sudan, Eritrea and Djibouti, which are more vulnerable, as well as more fragile both economically and institutionally. They are joined by Israel, with the port of Eliat and a coastal strip of barely five kilometres, but of enormous strategic importance as it allows maritime access to the Indian Ocean without having to pass through Suez, and Jordan, with a coastline that is also reduced, barely 15 kilometres, where the port of Aqaba, which gives its name to the gulf that bathes the east coast of the Sinai Peninsula, stands out.

This maritime stability has prevailed essentially as a consequence of the shared interests of the different actors, both regional and, above all, international, as it is part of the great shipping route between Europe and the Indo-Pacific. However, it contrasts with a land dimension in the region where weak or failed states, conflicts (both internal and inter-state) and humanitarian crises (with significant numbers of displaced persons) converge, all of which make these coastal countries a permanent source of instability.

Traditionally, these two dimensions, maritime and land, have not been connected and in recent crises such as those in Yemen, Ethiopia and Sudan, the former⁴ has hardly been involved. In fact, the lack of connection between the maritime and the land is a structural characteristic of the Red Sea and only in recent months, as a result of Houthi attacks on merchant traffic, have the region's maritime spaces been affected (Donelli, 2024).

From October 2023, the Iranian-backed Houthi militias, which control a significant part of the western half of Yemen, began to attack certain ⁵ commercial vessels transiting the area on the approaches from both the north and south to the Bab el-Mandeb strait, justifying these actions on the basis of their solidarity with the Palestinian group Hamas,

³ See: <https://>

⁴ We could mention, albeit almost as an exception, the maritime crisis arising from piracy in the Gulf of Aden and in Somali waters, although not really in the Red Sea but in its approaches from the South.

⁵ Theoretically to those ships that were in some way related to Israel.

as a consequence of Israel's actions in the Gaza Strip following the terrorist attack of 7 October. The attacks are essentially carried out with ballistic missiles and explosive-laden unmanned aerial vehicles (drones), and even, but less frequently, hijacking attempts (from helicopters or surface boats). The ships targeted are those that, in theory, have links or interests with Israel.

All this has led to a situation of increasing maritime insecurity in the Bab el-Mandeb Strait Area. Two merchant ships have been sunk in recent months and more than twenty have received major damage, all of which has caused the volume of maritime trade through the Red Sea to drop (as of December 2023) by more than 50% compared to previous years' figures (Delivorias, 2024). In the case of container traffic, transit through the area plummeted from around 500,000 in November 2023 to just over 200,000 in December (Kiel Institute for World Economy, 2024). This caused four of the world's top five shipping lines to suspend operations on the Red Sea route, opting instead for the longer and more expensive, but safer, route around the African continent.



The graph (map 3) shows (in red, on a dotted line) the traditional route through the Red Sea, as well as alternative routes to Europe from both Southeast Asia (brown) and the Persian Gulf (green), rounding the Asian continent. This means an average increase of some 3000 miles and ten days of sailing, with the corresponding increase in costs (fuel

costs are estimated to be in the region of one million dollars per ship, plus higher insurance premiums, etc.) and delays in delivery times.

The Houthi crisis in the Red Sea should be seen as one more piece (Murphy, 2024) of a very complex regional situation that is rife with tensions and conflicts (inter- and intra-state), where non-state actors, such as Iran's *proxies*⁶ in the region, take on a huge role.

Development of the crisis and current situation

The Houthi actions against merchant traffic in the southern Red Sea, centred on the northern and southern approaches to the Bab el-Mandeb Strait, have opened a new front in the already very complex geopolitical situation in the region. The traditional calm in the regional maritime dimension has been broken as the Houthi rebels have declared that they are targeting the merchant traffic of Israeli ships and those with interests or links to Israel and that these attacks will not cease until Israel's actions in Gaza are halted.

These actions are an additional variable to the aforementioned regional geopolitical chessboard, where Iran, in its ambition for hegemony in the area and to develop its strategy, relies on its *proxies* (Houthis, Hamas, Hezbollah and various groups in Iraq and Syria), which make up an anti-Western political-military coalition called the Axis of Resistance (Reuters, 2024) which, led by Tehran, (although not all share Iranian religious fundamentalism) has common objectives: resisting Western influence and confronting Israel.

⁶ In essence they are armed groups that receive funding, training and logistical support from state sponsors. In the Middle East region, this is the case of groups such as Hamas in Gaza, Hezbollah in Lebanon or the Houthis in Yemen, which are sponsored by Iran.



The hijacking of the Japanese ship *Galaxy Leader* on 19 November 2023 was the calling card of the Houthi rebels' campaign against maritime traffic in the southern Red Sea. Photos and videos of the seizure filled the front pages of the world's media. Ten months later, the ship is still in Houthi hands and its crew members are still being held hostage.

According to IMO (International Maritime Organization) sources, in the first 45 days of the crisis there were sixteen attacks⁷, which had the immediate effect of causing a sharp drop in maritime traffic through the Red Sea, which in the space of a few weeks is reduced by almost half.

As a result of this situation, on 18 December 2023, a coalition led by the United States was established, with the participation of various allies (the United Kingdom, Australia, Bahrain, Denmark, New Zealand, Norway, the Netherlands, Canada, among others, in addition to several countries participating anonymously⁸) called Operation Prosperity Guardian (OPG) with the mission of protecting maritime traffic. During these ten months,⁹

⁷ Detailed list of incidents in the Red Sea. Available at: <https://www.imo.org/en/MediaCentre/HotTopics/Pages/Red-Sea>.

⁸ Who prefer not to make their involvement public, or who support the actions, but do not want to say so publicly to avoid reprisals and to avoid raising the geopolitical *temperature* in the region. This includes some Arab countries in the region.

⁹ The content of this document closes on 30 September 2024.

it has shot down numerous unmanned aerial vehicles and missiles launched from Yemen against merchant and warships sailing in the Red Sea.

Since 12 January 2024, Operation Poseidon Archer (OPA), where the United States and the United Kingdom, supported by Australia, New Zealand, the Netherlands, Denmark, Canada and Bahrain, have been conducting cruise missile launches and air strikes against Houthi installations on the ground, aimed at disabling and destroying the drone and missile delivery systems, command and control nodes, and missile and unmanned vehicle arsenals of the rebel forces (Alejandra, 2024) .¹⁰

However, the final effect of this second operation is being limited, as in addition to the difficulty of precisely locating the targets to be destroyed, given the lack of forces on the ground¹¹, the Houthis have experience in recovering and re-establishing these systems and structures (normally unsophisticated and provided or supported by Iran), acquired during the civil war that affected Yemen in recent years, when they received Saudi airstrikes.

For its part, in February 2024 the European Union launched the maritime security operation¹² Aspides, also a military operation, although in this case of an exclusively defensive nature¹³. It is aimed at the protection and escort of merchant ships and is aligned with UN Security Council Resolution 2722 of 10 January 2024, which calls for the cessation of the use of the US Navy's ships. It is in line with UN Security Council Resolution 2722 of 10 January 2024, which calls for an end to Houthi attacks on merchant ships and recognises, in accordance with international law, the right of member states to defend them.

Despite the presence and activity of these naval operations, the scenario has hardly changed in the last ten months¹⁴ and attacks continue to occur with some regularity, although, as can be seen in the graph, with a slight tendency to decrease in recent months (IMO, 2024).¹⁵

¹⁰ Stark, Alejandra. *The Yemen Model*. RAND, 3 July 2024. Available at: <https://www.rand.org/pubs/commentary/2024/07/the-yemen-model.html>

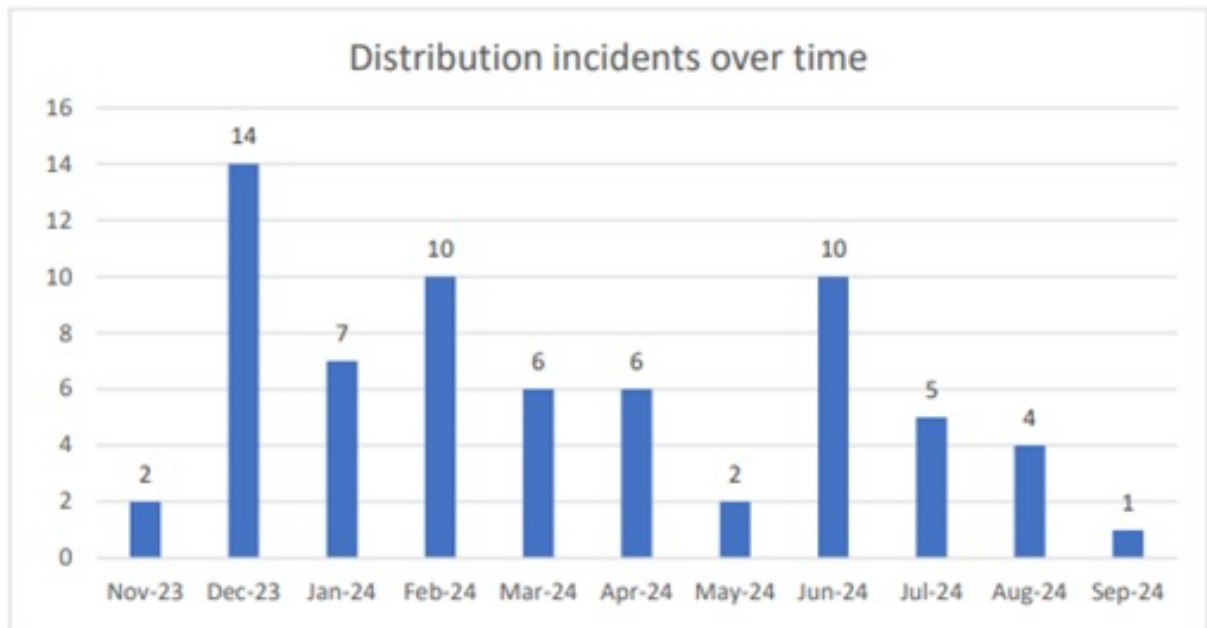
¹¹ Without boots on the ground, it is very difficult to dismantle and totally disable Houthi launch systems.

¹² See: <https://>

¹³ This operation does not include attacks on Houthi installations on Yemeni territory.

¹⁴ This document closes on 30 September 2024.

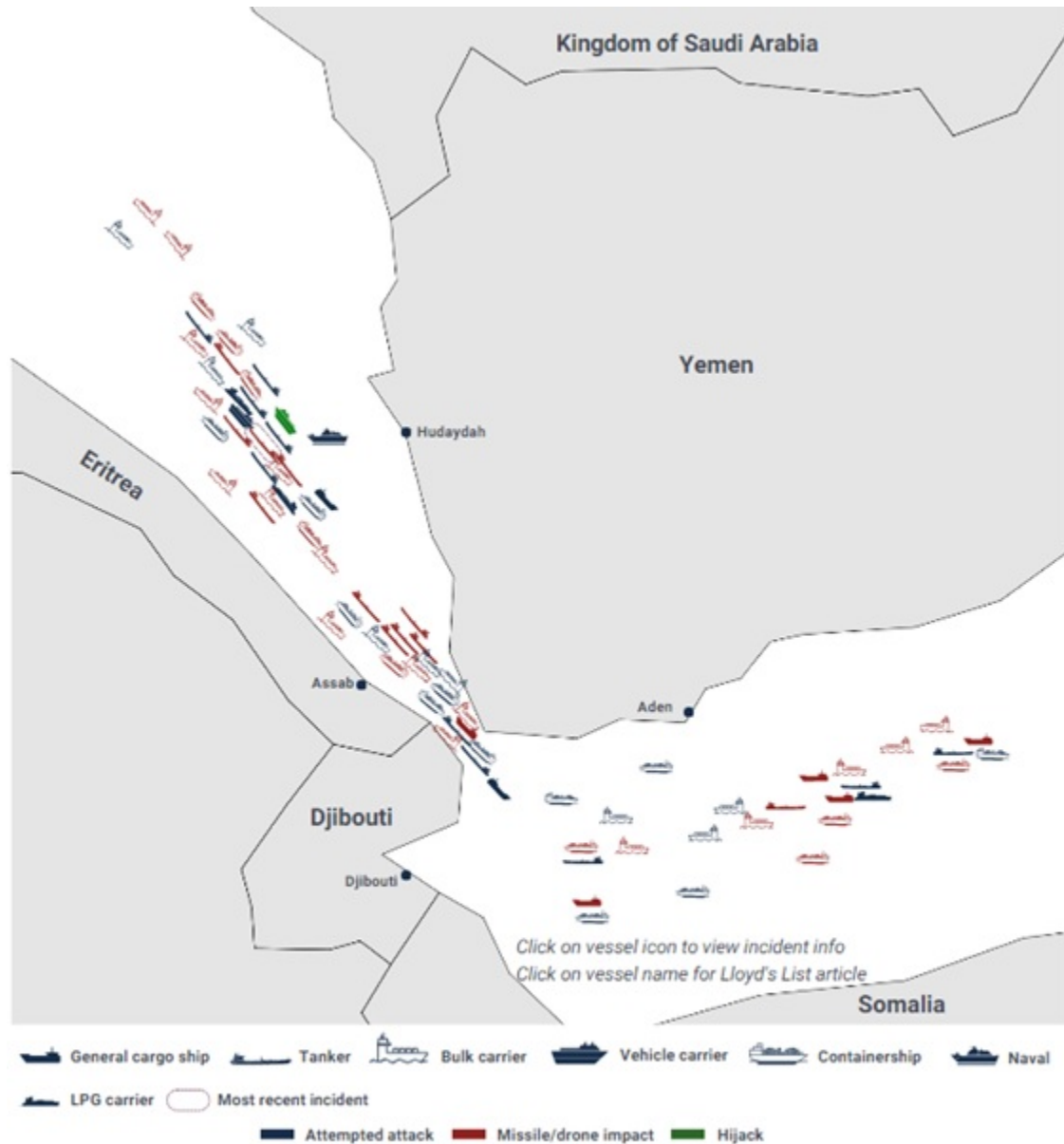
¹⁵ Data up to 12 September 2024. Available at: <https://www.imo.org/en/MediaCentre/HotTopics/Pages/Red-Sea>.



The warships in these two operations manage to intercept a significant number (majority) of missiles and drones launched from Yemen, although they usually do so with state-of-the-art missiles that are accurate and reliable, but very expensive and therefore of limited availability. The drones used by the Houthis, usually of Iranian origin and of low technology, cost about \$2,000 per unit and the ballistic missiles about \$20,000, while the Western missiles used to intercept and destroy them cost on average between one and two million dollars (Seligman and Berg, 2023) per unit. This cost disproportion is unlikely to be sustainable over time.

Despite their high percentage of shoot-downs, these ties are not having the capacity to deter the rebels from their attacks. The very limitation of Western means and above all the mandate of these forces (in particular Operation Aspides, which is strictly defensive), prevent them from defeating or deterring the rebels, who do not need to succeed in all their attacks, as a few hits are enough to disrupt shipping. Their strength lies not in winning the confrontation, but in sustaining it over time, as is happening (Arteaga *et al.*, 2024).

Map 4, from Lloyd's List¹⁶, details attacks, attempted attacks and hijackings on merchant ships (according to the colour code indicated), specifying also the type of ship.



Until the summer of 2024, the number of attacks on merchant ships is estimated at around ninety¹⁷. The percentage of ships that are hit by drones or missiles is low and, moreover,

¹⁶ The Lloyds List website also details the list of ships attacked and the circumstances of one in particular. Available at: <https://www.lloydslistintelligence.com/>

¹⁷ In the aforementioned list of incidents published by the IMO, 67 attacks are listed in the Red Sea up to 2 September 2024, although various sources put the number of attacks at more than ninety commercial vessels. Pentagon sources put the total number of attacks, including those received by warships, at around 190. Available at: <https://www.pentagon.mil/>

when they do occur, the damage is not usually very serious and most of them are able to continue in transit. However, the media coverage is remarkable, and each successful attack has a high profile, both in the shipping community and in Western public opinion.¹⁸

One of the most recent (August 2024) was the attack on the Greek tanker *Sounion*, carrying a million barrels of oil, which was attacked and boarded by Houthis, who detonated six bombs on board, leaving it adrift in flames. A salvage and rescue operation was organised (Kowalenko, 2024), towing the ship to a Saudi port, in very difficult conditions, with the idea of bringing it to safety and avoiding an oil spill that would have been a real ecological catastrophe for the Red Sea.

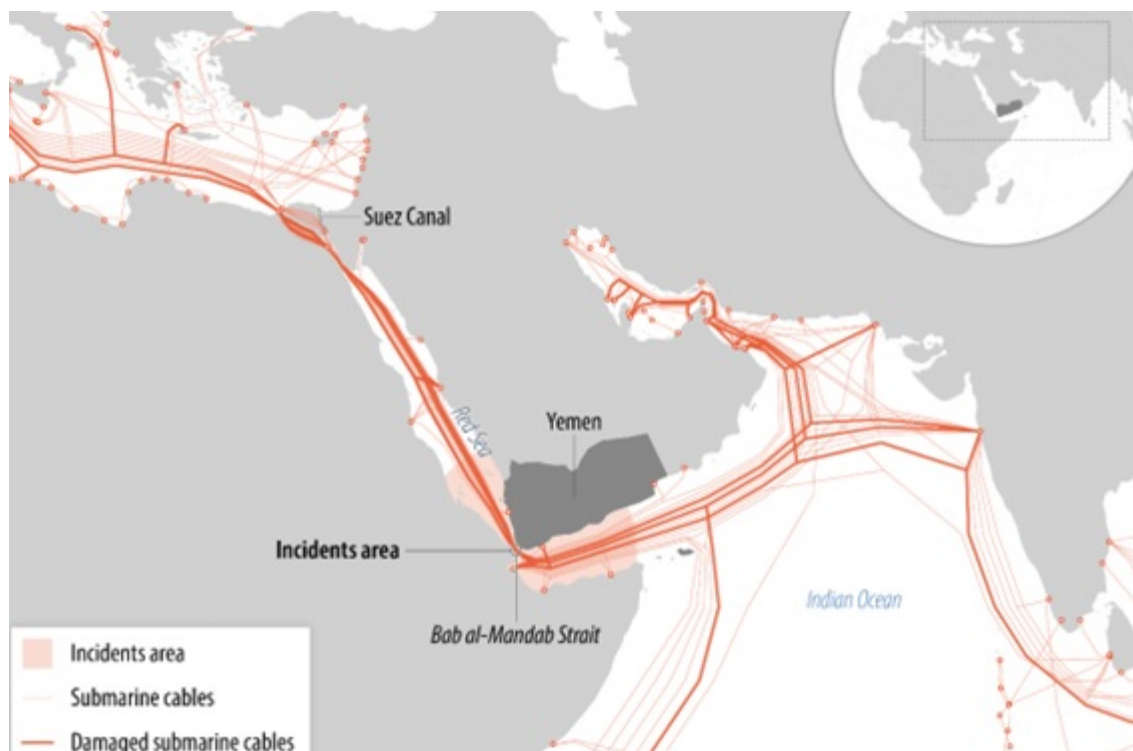


Although in theory the attacks are against Israeli vessels or those with links to Israel, other vessels are also being targeted, a situation possibly stemming from the Houthi lack of accurate information on traffic transiting the waters near Yemen and thus the difficulty of discriminating targets. However, until April 2024, when it left the Red Sea for Iran, an Iranian intelligence vessel, the merchant ship *Behshad*, remained in the area, possibly

¹⁸ However, only a few have been successful, albeit with a high profile on networks, such as the aforementioned hijacking of the *Galaxy Leader* in November 2023. The Singapore container ship *Maersk Hangzhou* was attacked on 30 December by four small boats attempting to board it, the crew managed to repel the attack, and following distress calls, US Operation PG ships were dispatched to the area, sinking three of the boats, with ten reported Houthi casualties. In February 2024 the Belize-flagged freighter *Rubymar* was sunk by several drones, in March the Barbados freighter *True Confidence* was sunk by drones and four crew members were killed, and in June the Liberian-flagged coal carrier *Tutor* was attacked by an unmanned surface vehicle, eventually sunk and one crew member has been reported missing. Source: IMO.

trying to provide the Houthis with more precise information on possible targets for their attacks (Financial Times, n. d.). In any case, this lack of precise information does not seem to be of much concern to the Houthis, who are actually more interested in generating a general situation of instability, of maritime insecurity in the area, affecting all ships with interests related to the West.

Although less prominent in the media, we should not overlook the international community's concern that the Houthis could sabotage the submarine cables that cross the area (see map 5).



These infrastructures are critical for connecting Europe with Asia (90 percent of communications between the two continents is done through the fourteen submarine cables transiting the Red Sea (AP, 2024)¹⁹. In any case, it seems unlikely that the Houthis currently have this capability, although the situation could be different if they were actively supported by Iran (Johnson, 2024).

¹⁹ And that they want to increase by six more, to a total of twenty cables. Available at: <https://english.elpais.com/international/2024-03-04/three-red-sea-underwater-data-cables-have-been-been-been-cut-as-houthi-attacks-continue-in-the-vital-waterway..>

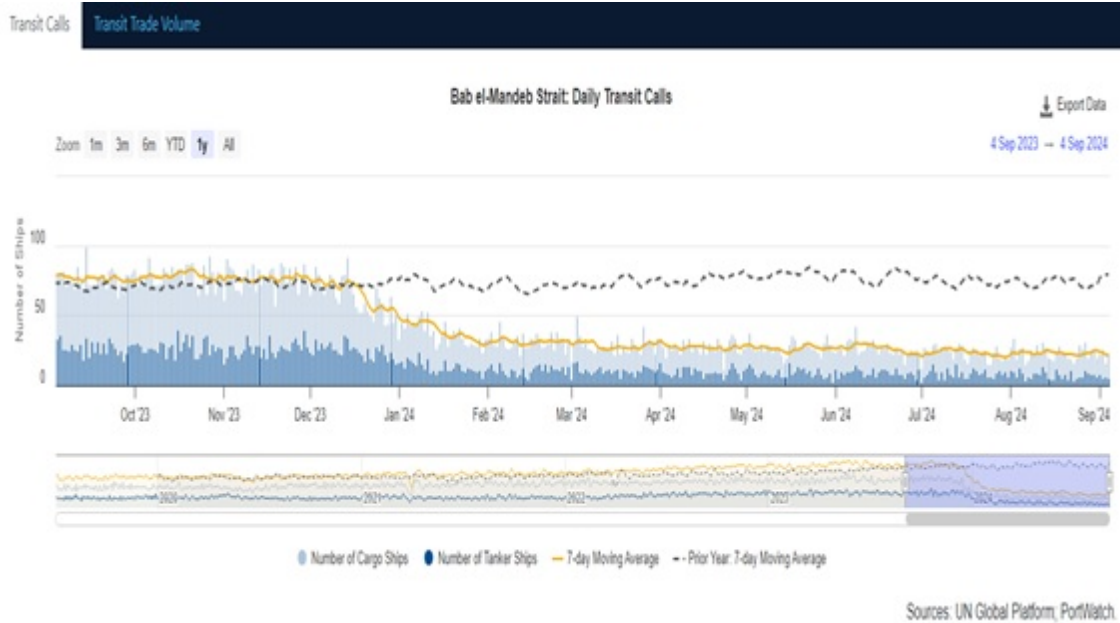
Significantly, on 26 February it was reported that several cables of four major telecommunications companies were damaged (map 4), affecting approximately 25% of the traffic crossing the Red Sea, without the causes being identified. The part of the cables affected were within Yemeni maritime jurisdiction (Gritten, 2024), although the Houthi authorities denied their involvement in these events.

Maritime and economic perspectives

The main economic consequences of this crisis are that shipping through the Red Sea, which accounts for about 15 % of world seaborne trade, has decreased by more than 50 % since December 2023, with a particular impact on container traffic, which has decreased by almost 90 % (due to the high value of its cargo).

As for energy supply, tanker traffic through the Bab el-Mandeb has been gradually decreasing, by almost 50 %, although attacks such as the one mentioned above on the Greek vessel Sounion could worsen the situation in the coming months. Despite this situation, hydrocarbon logistics has demonstrated its resilience (Arteaga *et al.*, 2024), adapting fairly quickly to the situation and proof of this is that the crisis has not significantly affected gas or oil prices.

The decrease in general cargo and bulk carrier (lower value cargo) traffic has been somewhat smaller, as shown in graph 2. Adding all types of ships, from an average of seventy merchant vessels per day passing through the Bab el-Mandeb in 2023, it has gone down to approximately half, as detailed in the graph.



The use of alternative shipping routes around Africa means an increase in transit time of between one and two weeks, with a consequent increase in costs²⁰. This is coupled with reduced availability in terms of cargo capacity, estimated to have decreased by 15-20% in the second quarter of 2024 (fewer vessels available, due to longer transit times using longer routes) and congestion problems in certain ports that were previously less used²¹. Delays mainly affect the transport of perishable goods or components for manufacturing industries using the *Just in Time* (JIT) method²², which can bring factories to a standstill.

As a consequence, the global supply chain is under significant stress and in addition to delays and cost increases in general, ports such as Singapore or Shanghai in Asia are becoming congested (with fewer ships available to handle the cargo). Southern African ports are finding it difficult to cope with the sharp increase in traffic on the Good Hope route and to provide services (bunkering and other) to ships. At the regional level, the

²⁰ This is in the region of an additional USD 1 million in fuel for each trip, plus an increase in insurance premiums, which have risen from 0.1 % of the cargo value before December 2023, to 1 % in January 2024, rising to almost 2 % in February, plus other costs (crew, etc.). Source: World Bank report on the impact of the Red Sea Crisis, April 2024. Disponible en: <https://documents1.worldbank.org/curated/en/099414105062418860/pdf/IDU1a1491aa617394148a91856c1eaa57a28f15b.pdf>

²¹ On the round Africa route, ports in East and Southern Africa do not currently have the capacity to absorb the sharp increase in the number of ships transiting the route and demanding port services. See: <https://concepto.de/metodo-just-in-time/>

²² *Just in time* is a method of organising production that reduces costs by eliminating the need for storage and inventory of raw materials or elements for production, as they arrive when they are needed. The ships that transport them are actually the new warehouses, so that delays in arrival can paralyse industrial production. See: <https://concepto.de/metodo-just-in-time/> An example would be components for the European car industry that come from South East Asia; if they do not arrive on time they paralyse car production in Europe. See: <https://concepto.de/metodo-just-in-time/>

consequent reduced use of Red Sea ports, due to fewer ships, has important negative consequences, both economic and commercial, for the countries of the region.

To all the above, we can add other additional implications, such as the impact of this crisis on humanitarian aid for Sudan and Yemen, whose arrival in delivery areas is delayed for weeks and which has also increased its costs due to longer routes around Africa (USNI, 2024). In addition, there are additional distribution problems on the ground and situations such as the port of Hodeida in Yemen, through which humanitarian aid from the World Food Programme (WFP) and other UN agencies enters to supply Yemen's malnourished population. This area is under the control of the Houthis, which makes it very difficult for aid to reach the population without them benefiting. In addition, the fact that humanitarian aid traffic is centralised in Hodeida makes it difficult to seize weapons from militias entering through the port. More thorough inspections of incoming cargo may mean that humanitarian aid may be delayed or even fail to reach the population in time.

Regarding the economy, the effects of this maritime insecurity situation, particularly in European and Southeast Asian countries, could be considered limited. The resilience of the global shipping industry and some excess commercial shipping capacity are cushioning (but not eliminating) the potential negative impact (Gupta, 2024). Although the long-term implications may result in higher inflation globally, as well as long-lasting effects on JIT manufacturing industries, it is foreseeable that the shipping industry will have the capacity to continue to adapt, keeping the economic impact of the crisis within reasonable limits.

A recent paper (Schwarzenberg, 2024) from the US Congress estimates that the economic impact would have a limited or even marginal effect on the world economy, with a small reduction in global GDP by a few tenths of a percentage point and some pick-up in inflation. However, the effects would be most significant in Europe, but especially in the countries of the Middle East and the Horn of Africa region. For Europe, if the shocks continue, it is estimated that GDP could be affected by around 1 % and inflation by somewhat more, which, while not good news, does not seem very worrying either.

However, the impact on the countries of the region is, in relative terms, much greater, stemming from their weaker and more vulnerable economies, which are less able to adapt to the situation. The halving of maritime traffic affects all Red Sea ports and their activity, and particularly the Suez Canal, which accounts for 14% of Egypt's economy and is the

country in the region most affected by the crisis. Revenues in the first months of the crisis fell by 50% (the same proportion as the number of ships in transit). Djibouti, a key trade node for East Africa, and Sudan depend on the canal for 31% and 34% of their foreign trade respectively. Saudi Arabia, although economically stronger than its neighbours, has suffered a reduction in traffic at its Red Sea ports (King Abdullah and Jeddah) of up to 70% and its oil exports through these waters have also been significantly affected (Sajeev, n.d.).

Geopolitical perspective

The current Red Sea crisis opens a new front of tensions, adding to the already complex geopolitical equation in the region, with many internal and inter-country conflicts. Saudi Arabia and Iran, supported by their *proxies*, are vying for regional leadership, a game in which Egypt and Israel are also major players, and where, from the outside, major powers such as the US, China and Russia, to which we could add middle powers such as Turkey, are also playing an important role.

Focusing on this crisis, the Houthis' publicly repeated motivations for justifying their actions are solidarity and support for the Palestinian people in the face of Israel's campaign in Gaza. This gives them great prominence and support in the Muslim world, where the Palestinian cause is popular and highly emotional. Moreover, they send the signal that the Red Sea is a legitimate theatre for the fight against Israel, where the Houthis are willing to attack American warships and Israel-related merchant traffic (The Economist, 2023).

Added to this are the Houthis' own internal imperatives and regional ambitions, for whom this crisis strengthens their position in their own territory. There is consensus among Yemen experts that an even more powerful motivation than support for the Palestinians is the need to distract attention from growing internal dissent over the Houthi leadership since the April 2022 truce²³, as well as to strengthen the Houthis' position both within Yemen and in the region (Minor, 2024). It is therefore quite likely that the threat will persist,

²³ In 2014, Houthi rebels rose up against the established government, provoking a civil war in Yemen, in which they seized part of western Yemen and forced the country's president to flee. Saudi Arabia, fearing that they would take over Yemen and turn it into a satellite of their great regional rival Iran, supported the established government, while Iran supported the Houthi rebels. Since April 2022 the situation has been one of a fragile truce, with the Houthis controlling the west of the country (including its capital Sana'a) and thus its Red Sea frontage.

even if a ceasefire is reached in Gaza, as this is not just about Israel, but about Iran's attempt to control the region.

Role of external actors

Even though the Houthi attacks are a serious threat to freedom of navigation, with significant consequences for commercial maritime traffic globally, the countries most affected by these attacks, in the Middle East as well as in Asia and Europe, have been reluctant to take joint action and engage in naval operations that could address the problem in a coordinated manner. Self-interest prevails over the interests of the whole.

China, whose ships, though not potential targets, also come under attack and suffers the economic consequences of the situation, deriving from its huge trade traffic with Europe, especially containers, has refused to cooperate with the US, although this is not surprising given the state of bilateral relations. On a general level it can be argued that the major powers are unwilling to work together to defend global goods, even when these are unrelated to the competition between them. There are certain anti-internationalist tendencies that make it difficult to move towards a unified approach, even among US allies in Europe (Minor, 2024b), of which the EU's own Operation Aspides, or the stance of France when in December 2023 it decided to keep its naval units in the Red Sea under national command (Reuters, 2023), are clear examples.

Among the various external actors, the United States is by far the most active. Its undisputed support for Israel and its role as guardian of global sea lanes, the arteries of world trade, oblige it to have a very strong presence in the region. This is located both in the Eastern Mediterranean, protecting Israel from air attacks by Iran or its *proxies* (ballistic missiles launched from Yemen against Israel), and in the Red Sea, the Gulf of Aden and the northern Indian Ocean, in maritime security tasks (protecting merchant traffic), trying to disable and destroy Houthi launchers and arsenals in Yemen by means of air strikes, and above all protecting Israel from missile and drone attacks launched from countries in the region that target its territory.

To date, the US approach to the crisis has been mainly defensive, acting in a rather reactive manner, with the idea of not overly increasing geopolitical tension in the region,

aware that its acceptance in the region is decreasing, a consequence of its clear support for Israel on the Palestinian issue.

In this balancing act between suppressing the Houthi threat to maritime security, protecting Israel from attacks by the various Axis of Resistance actors, and using naval presence as a deterrent to try to prevent regional geopolitical tension from rising too high, the US has been deploying a significant number of naval aircraft in the region in recent months. This includes aircraft carrier battle groups²⁴, which have been stationed in the Eastern Mediterranean, the Red Sea, the Gulf of Aden, the northern Indian Ocean and the Persian Gulf. Although it is unusual, the presence of *US Navy* ships in the region has been very high in recent months and currently (September 2024), as a result of the growing regional geopolitical tension, two battle groups are deployed in the northern Indian Ocean, in addition to other ships such as destroyers that remain in the Red Sea.

This deployment gives us an idea of how extraordinary the situation is, for if the US usually has about four battlegroups deployed around the globe, two are usually in the Western Pacific, as this is its area of greatest interest, and the others around the rest of the world. It so happens that for the first time in a long time, for a period of at least three weeks (late August to mid-September) there will be no battle groups (Johnston, 2024) in the Western Pacific, due to this build-up in the Middle East.²⁵

Although Houthi attacks on ships transiting Bab el-Mandeb are not the main source of tension in the region, if we add to their actions in the Red Sea the ballistic missile attack of 15 September (Emergui, 2024a), which launched from Yemen reached Israeli territory for the first time, the Houthi rebels are gaining increasing prominence, contributing to raising the regional geopolitical temperature even higher.

For its part, China has taken on a role that can be described as more timid, to some extent almost absent, despite its important interests in keeping the Red Sea route safe for

²⁴ A *Carrier Strike Group* (CSG) is a grouping of *US Navy* ships, usually consisting of a (nuclear) aircraft carrier with its embarked air unit (typically about 80 state-of-the-art fighters plus embarked early warning, control and electronic warfare aircraft), escorted by several missile destroyers, usually joined by a nuclear-powered attack submarine. The US currently has eleven operational nuclear-powered aircraft carriers (with an average displacement of 100,000 tonnes) and three under construction, around which it builds its various CSGs.

²⁵ On 9 September 2024, the *Carrier Strike Groups* (CSGs) of the aircraft carriers Abraham Lincoln and Theodore Roosevelt were operating in waters south of Yemen and the Gulf of Oman and no CSGs in the western Pacific. In addition, two missile destroyers were in Red Sea waters. Available at: <https://www.pentagon.gov/2024/09/09/us-navy-carrier-groups-in-the-red-sea/>

maritime traffic²⁶. In this case, China's geopolitical calculation is twofold: on the one hand, it considers that its merchant ships are not potential targets for the Houthis (even if they have suffered some attacks), which is why they are clearly identified during their passage through the area to avoid being considered or confused as targets, and, on the other, it assumes that its support for Gaza in the current context plays a relevant role in its campaign for leadership of the global south. The option of a Washington-Beijing partnership in this crisis does not appear to be too attractive to China (Murphy, 2024).

In any case, China maintains an active presence in the region. Its naval base in Djibouti (its only naval base abroad), at the entrance to the Red Sea, allows it to exert influence in the area, in addition to supporting its warships that have been deployed in the waters of the region for years, since the beginning of piracy in the waters of Somalia. They maintain a presence, but do not integrate or collaborate with any Western naval operations.

China's foreign policy (Álvarez-Ossorio, 2024) is characterised by being multidirectional and de-ideologized, and being dependent on Middle Eastern hydrocarbons it seeks to maintain close and cordial relations with Iran and Saudi Arabia (between which it mediated the normalisation of bilateral relations that were re-established between the two in March 2023), with the Gulf countries, and even with Israel. It is driven by essentially commercial motivations, has a strong interest in the region, particularly in the framework of its Belt and Road initiative (Khanna, 2024), and if it seeks a greater diplomatic role, it is to help reduce regional tensions and thus achieve greater stability, a prerequisite for making its growing investments and commercial interests in the region profitable. It does not intend, at least for the time being, to take on a significant military or security role, hence its passivity in this crisis (Scott, 2024).

China, following to some extent the theory of relative gains, is playing to lose less than the US by keeping a low profile, while its great rival in the Pacific, the US, wears itself out in a crisis that is difficult to resolve, detracting key naval assets that while in the Indian Ocean are not in waters close to China. At the same time, it is quietly cultivating its relations with key regional players, while the US is increasingly unpopular. From a

²⁶ Most container ships entering the Red Sea through the Bab el-Mandeb Strait carry Chinese goods destined for European markets. The EU imported \$626 billion worth of goods from China in 2022 (almost twice as much as it exported to China).

purely maritime perspective, it is worth noting that China benefits from the maritime security actions of US and EU missions in the Red Sea at no cost.

In this crisis, Russia's role in the region is not very active, mainly because of the war in Ukraine and its limited presence and influence in these waters.

However, because of Western sanctions, Russia sells much of its hydrocarbons to China and India, so it also needs maritime stability and security in the Red Sea (Grover *et al.*, 2024), but it will not cooperate with the US and the EU, for obvious reasons.

Russia, in its rivalry with the US and in opposition to its hegemonic strategy, seeks, together with other revisionist powers such as China and the BRICS, to promote a multipolar world that replaces the post-World War II order, which no longer privileges it (beyond its veto in the UN Security Council) and where it can play a more prominent role through alliances. In this context, Russia has been seeking a greater presence and influence in the region for some years now, and after the so far unsuccessful attempts to establish a naval base in Sudan (in *Port Sudan*), in clear counterbalance to the American, Chinese and French presences with their bases in Djibouti, it is also exploring with Eritrea the idea of establishing a base, possibly on the islands of Dahlak (Plaut, 2024).

For its part, the European Union has a strong interest in keeping the Red Sea shipping route open and secure, given its impact on trade and maritime transport relations with Southeast Asia and the Middle East in relation to hydrocarbons. In this scenario, in February 2024 it deployed the aforementioned maritime security (defensive) operation *Aspides*, within the framework of the CSDP.²⁷

However, the EU has yet to decide what role to play in the region, if any, as it does not yet have a unified position on how to address the regional geopolitical landscape. This is clearly reflected in the lack of an EU position on the situation in Gaza. The reality is that different member states have uneven, even divergent, positions, which severely restricts the EU's ability to exert influence.

Thus, the EU's role in the tense geopolitical situation in the Middle East is scarce and, in particular, in the maritime crisis in the Red Sea it is not relevant either, as it has only deployed the essentially defensive operation *Aspides*, which does not address the root

²⁷ CSDP - Common Security and Defence Policy of the EU. See: <https://>

causes of the situation. It manages to prevent some missiles or drones from reaching their targets, but not further attacks, which is a success for the rebels. Israel, while focusing on Hamas and Hezbollah, also responds to Houthi attacks. Thus, on 29 September it launched an airstrike (Emergui, 2024b) on the Yemeni port of Hodeida in response to missile launches on the 26th and 26th.

Conclusions and outlook

The maritime security crisis in the Red Sea, epitomised by the Houthi attacks on ships sailing in the approaches to the Bab el-Mandeb Strait, opens a new front, adding a new dimension to the already very complex geopolitical chessboard of the Middle East.

The consequences of this maritime crisis are essentially economic and commercial and although they have a major impact, affecting one of the key global shipping routes, their real effects on the world economy and trade are serious but not critical. The shipping industry and maritime trade are showing their resilience and ability to adapt to the situation, making the effects of the crisis less severe than expected.

If in absolute terms the most affected countries are those in Europe and to some extent those in Southeast Asia, in relative terms, given the vulnerability and fragility of their economies and institutions, the worst affected are clearly the countries of the region, particularly those bathed by the waters of the Red Sea.

The US and the European Union have opted to launch two naval operations to protect maritime traffic in the area and, in the case of the US, a second, additional operation, more restricted in terms of participation, to attack at source the means used by the Houthis for their attacks. However, the effects of these operations have not been decisive, as they have not managed to permanently disable these assets (which are replaced and rebuilt by the rebels with Iranian help). It should be borne in mind that the Houthis only need occasional success in their attacks (a low success rate is sufficient) to achieve a significant effect, both in terms of the media and in maintaining the conditions of insecurity for maritime traffic. Their success is based on managing to maintain this situation over time.

In order to deal with this crisis with more guarantees, a multilateral approach would be necessary, with the participation of China and even Russia. The reality is that these

countries have no interest in participating for various reasons: for their traditional lack of harmony with the US and its foreign policy, which in this case allows them, particularly China, a discreet diplomacy in the region that allows it to continue advancing its goal of creating an alternative to the world order established by the West, and for being able to benefit from the (limited) results of maritime security operations without having to participate or contribute.

In addition, the crisis in the Middle East, of which the Red Sea crisis is only one part, is forcing the US to deploy naval air assets in the area in order to protect maritime traffic in the region, but above all Israel. This limits the deployment of assets in the Western Pacific, an area of priority interest for the US, which essentially benefits China's interests.

The Red Sea crisis is a win-win situation for the Houthis. On the one hand, to gain popular support in the Muslim world for their solidarity and support for the Palestinian cause (because of the situation in Gaza) and on the other, perhaps more importantly to regain support domestically, in a situation of clear loss of support from the population as a result of their mismanagement domestically during the current truce period in the Yemeni civil war.

The crisis is likely to be long-lasting, as the Houthis need only sporadic success in their attacks, as naval air operations in the Red Sea have no real capacity to end the problem. The situation will continue to benefit the Houthis internally, Iran and its Axis of Resistance regionally, and China and Russia indirectly globally, especially in relation to the US, which, being the most active, stands to lose the most if current conditions continue. It loses ascendancy and hegemony in the region (to the benefit of China, which uses a more discreet and pragmatic diplomacy), it is increasingly unpopular, and the situation forces it to fix a very considerable part of its naval air assets in the region, with the aforementioned consequences of a reduced presence in the Western Pacific.

The resolution of this crisis will foreseeably be linked to the evolution of the geopolitical situation in the region, currently characterised by tensions and conflict between Hizbullah and Israel in southern Lebanon, between Hamas and Israel in Gaza, and where the Red Sea crisis is becoming less prominent, both geopolitically and in economic and commercial terms.

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ANNEX I

Chronology of the Red Sea crisis

DATE	EVENT
7 OCT 23	Hamas attack on Israel
OCT 2023	Houthi attacks on ships in Red Sea increase
19 NOV 23	Houthi militia (boarding the vessel from a helicopter) hijack the Japanese (Bahamas-flagged) merchant ship Galaxy Leader
DEC 23	As a result of the attacks on ships, most shipping lines globally stop using the Red Sea route between the Indian Ocean and Europe.
19 DEC 23	The US organizes and leads Operation Prosperity Guardian to protect maritime traffic in the Red Sea and approaches.
31 DEC 23	The container ship Maersk Hangzhou (Singapore) is attacked by four boats carrying Houthi militiamen. The attack is repelled, and US Navy air assets (as part of Prosperity Guardian) subsequently respond to the distress call and sink three of the four boats, with ten Houthi casualties.
10 JAN 24	The UN Security Council adopts Resolution 2722 (2024) condemning Houthi attacks on merchant and commercial vessels, demanding an immediate end to the attacks and noting that Member States have the right to defend their vessels from attack.
12 JAN 24	The US organizes and leads Operation Poseidon Archer, a ground attack operation on facilities used by the Houthis in their attacks. From this date onwards, there are numerous missile and aviation attacks on Yemeni soil, particularly during January and February 2024. On 12 January and 10 February, the Houthis acknowledged five and seventeen casualties respectively as a result of the US and UK strikes.

19 FEB 24	The European Union's Operation Aspides, for the protection and defence of maritime traffic in the Red Sea, begins.
19 FEB 24	The cargo ship Rubymar (Belize) is attacked and hit by two Houthi drones. It sinks on 2 MAR.
6 MAR 24	The bulk carrier True Confidence (Barbados) is attacked and hit by Houthi drones. Three crew members are killed in the attack.
12 JUN 24	The bulk carrier Tutor (Liberia) is attacked by an unmanned surface vehicle and aerial drones. One crew member is reported missing in the attack. The rest of the crew are rescued. The ship sinks on 18 JUN.
21 AUG 24	The oil tanker Sounion (Greece) is attacked by several drones. Houthi militias board it and plant explosives. It remains adrift in flames (after explosions) with the danger of causing an environmental disaster (it was carrying one million barrels of oil). Greek tugs, supported by Operation Aspides EU, tow it to safety away from Yemeni waters.
15 SEP 24	A ballistic missile launched by the Houthis hits Israeli soil for the first time without significant damage
26 SEP 24	Israel intercepts a ballistic missile launched by the Houthis, which targeted a military facility in Tel Aviv.
29 SEP 24	Israel launches air strikes on facilities in the Yemeni port of Hodeida in response to Houthi attacks on 15 and 26 September.

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