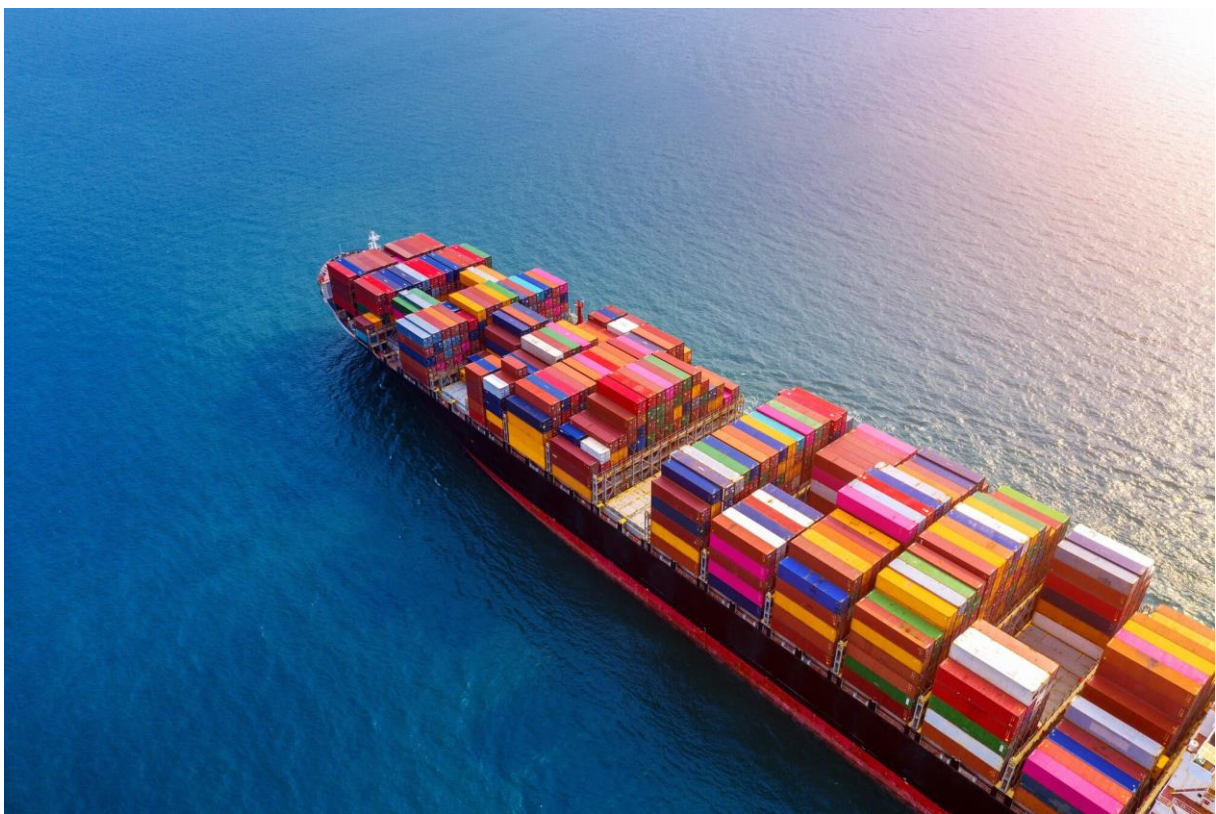


# Disruptions in the global supply chains? The case of the Houthi attacks in the Red Sea

László Csicsmann

After a US-led coalition responded to Houthi strikes on Red Sea commercial ships, there are concerns that the situation could worsen and lead to a protracted civil war.



Credit: Freepik/tawatchai07

## Introduction

The recent intensive attacks with drones and ballistic missiles on commercial ships in the Red Sea by the Yemeni-based Houthi rebels shocked the international community. [The goal of the international alliance](#) known as Operation Prosperity Guardian, which the United

States initiated in December 2023, is to safeguard the strategically significant maritime route, which accounts for 12–15% of the world's cargo ship traffic. This brief analysis examines the circumstances surrounding Yemen and explores the conflicting interests that regional players have in the Red Sea.

### Conflicting regional agendas and interests in Yemen

Yemen has been engulfed in a [lengthy civil conflict](#) since 2014 as an aftershock from the Arab Spring demonstrations. Due to the involvement of numerous regional countries, a traditional Middle Eastern proxy war in a fragile state has emerged. In 2015, Saudi Arabia began an international intervention with the goal of fortifying the internationally recognized Yemeni government. Since the 1990s, the Houthi rebel movement has stood up to the government in Yemen by standing up for individuals who are disenfranchised both politically and economically. The Houthi movement, which was at first autonomous from Iran, has fought effectively against both the national government and foreign intervention.

Currently, the Houthis rule the bulk of Yemen's population, living in the country's northern regions, the Red Sea coast, and the capital city of Sanaa. The movement aims to establish a federal government structure that caters to the needs of underprivileged communities. The Saudi-led intervention pushed the Houthis closer to Iran, which helped the movement with [missiles and other ammunition](#). The outcome of the intervention was the opposite of what Saudi Arabia had hoped to achieve, namely weakening the rebel movement. Due to their sporadic drone assaults on Israeli territory, the Houthis constituted a significant security threat to both Israel and Yemen's immediate neighbors. One of the worst attacks occurred in 2019, when two drone attacks on Saudi Arabia's oil infrastructure caused a brief drop in oil production. The Houthis also conducted a number of drone strikes on the [United Arab Emirates](#) in January 2022. Drone attacks on Bahrain were carried out by the Houthis in September 2023, just a few days prior to Hamas' devastating terror attack on Israel.

The [United States](#) has advocated for the end of hostilities while mainly ignoring the security concerns expressed by the Gulf Cooperation Council countries regarding the Houthis' strikes. Washington has expressed particular alarm about the dire humanitarian situation in Yemen and urged Saudi Arabia to cease hostilities. In April 2022, Riyadh, which is concerned about its reputation internationally, agreed to a six-month truce with the Houthis. The UAE

also announced its withdrawal from the conflict in Yemen. The Houthis have been able to use the Hodeida Port, breaking the blockade against them since the recent rapprochement between Saudi Arabia and Iran in March 2023. The Houthis demanded a seat at the table in the event of a negotiated political transition, viewing the ceasefire as evidence of their military triumph. They used their perceived victory to continue the civil war within the country, leading to their strengthened economic and political position. The Houthi movement is modeled after the Lebanese Hezbollah, which emerged from a military non-state actor into a semi-state political party while maintaining its military role.

[Negotiations between the Saudis and the Houthis](#) regarding an extended ceasefire and a political solution to the Yemeni crisis were taking place for many weeks prior to the start of the Gaza war between Israel and Hamas. The formal Yemeni government, the [eight-member Presidential Leadership Council](#), was sidelined by the Saudis, who since April 2022 have only engaged in negotiations with the Houthis. It is noteworthy to highlight that a competition developed between Riyadh and Abu Dhabi following the subsequent vow of assistance by the United Arab Emirates for the rebels in the South who are fighting for their own autonomy. The so-called Southern Transitional Council, an umbrella political group for the Southern insurgency movement, has been advocating either independence or at least autonomy in a reorganized Yemen since its establishment.

## Conclusion

The Houthis saw an opportunity to advance their [political agenda and acquire more legitimacy in Yemen](#) with the outbreak of the Gaza conflict. Attacking commercial vessels in the Red Sea as an ideological support for the Palestinian cause could enhance the Houthi movement's political position in Yemen. The Houthis have made a long-term ceasefire in the Gaza Strip a precondition for them to stop assaulting commercial ships in the Red Sea.

Without providing a political solution to [Yemen's internal divisions](#), the United States, which had previously been reluctant to acknowledge the security threat posed by the Houthis, could jeopardize the delicate process of normalization in Yemen and the surrounding region by forming an international coalition known as Operation Prosperity Guardian. It is also accurate to say that Egypt, which owns the Suez Canal, and Israel both suffered financial losses as a result of the continued escalation in the Red Sea. The arguments made by those

who favor the establishment of a [different trade route](#) than the Suez Canal may have gained momentum in light of the recent conflict in and around the Red Sea. Nevertheless, at this point, someone ought to help Yemeni political discourse internally rather than fleeing the nation and thereby worsening the humanitarian crisis and prolonging the civil conflict.

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