

Fall 2024 - Marcellus Policy Analysis

## The Red Sea Crisis: Navigating Failure and Correcting Course

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### EXECUTIVE SUMMARY

The crisis in the Red Sea has caused serious troubles for global trade and American prestige. The current approach towards the Houthis is failing due to the material and strategic realities that constrain U.S. policy in the Middle East, primarily that the United States has a limited arsenal and a declining interest in the region. These factors are glaringly apparent when challenged with the proliferation of cheap weaponry that enhances the effectiveness of disruptive actors, who can increasingly rely on rivals to U.S. global leadership to supply and aid them in their endeavors. The United States' failure to deter the Houthi's is partially due to an overstretched and overcommitted defense industrial base that is already struggling to meet the high demands of the U.S. military, as well as its allies and partners. That issue is intensified by the fact that the Middle East has limited trade and resource interests for the United States, especially when compared to other theaters, namely the Indo-Pacific. The incongruence of interests for the United States between the two regions, combined with the limitations of U.S. military supplies, necessitates a re-prioritization of U.S. military resources away from the Middle East and towards the Indo-Pacific.

With that necessity in mind, it would be beneficial to the United States to have a diplomatic deal or alternative security structure in the Red Sea as it draws down its presence. This development would help facilitate the drawdown by easing concerns over the threat to global trade that current Houthi actions entail and show that the

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United States maintains the capacity to be a credible partner. This paper will expand upon the failures of the current approach and the need for an alternative. It will then investigate three historical samples that provide lessons to be drawn for how the United States has previously dealt with threats to maritime trade. It will culminate with several alternative policies, both diplomacy and security focused, that the United States can pursue, while examining the strengths and weaknesses of each proposal. Many of these proposals can be combined and should not be considered exclusionary to each other, and all are designed to ease the potential downsides of the necessary military drawdown from the Middle East and the Red Sea.

## **Policy Inertia and its Consequences: The Failure of the Red Sea Response and the Imperative for Change**

The United States is currently facing a crisis in the Middle East related to threats against the trade route that passes through the Red Sea and the Suez Canal. The Houthis, a rebel group in Yemen that rose to significance during that country's decade long civil war, have consistently conducted attacks on ships passing through the Red Sea since November 2023. The Houthis have stated that this is in response to Israel's invasion of Gaza after the attacks by Hamas on October 7<sup>th</sup>, 2023. While these are not the first instances of Houthi attacks in the Red Sea, as they conducted multiple strikes on ships in nearby waters in 2016 during their conflict with Saudi Arabia these attacks have proven to be far more disruptive, causing several major shipping companies to opt for the longer route around Africa.<sup>1</sup> In response to these attacks on commercial shipping, the United States launched Operations Prosperity Guardian and Poseidon Archer in December 2023, a multi-nation effort to deter Houthi attacks and secure the Red Sea and Suez Canal for trade. In early January 2024, President Joe Biden redesignated the Houthis as a terrorist organization, and in coordination with the British launched the initial strikes of the new operations against Houthi targets in Yemen.<sup>2</sup> While President Biden's actions reignited debate over Presidential unilateral authority on military actions, he pledged to continue them.<sup>3</sup> Despite the persistent strikes on Houthi targets and destruction of missiles and drones launched by the Houthis against commercial and military vessels, the

campaign has not succeeded in restoring deterrence.<sup>4</sup> As the head of U.S. naval operations in the Middle East, Vice Admiral George Wikoff, explained this past August, while the operations have had limited success in degrading the Houthi's capabilities to attack shipping, resulting in a stilted resumption of commercial activity in the Red Sea, the campaign has not terminated the threat. He also emphasized that, "The solution is not going to come at the end of a weapon system", and that when it comes to a long-term solution "The more players in the field that can get involved in a diplomatic piece of this, the better off I think we'll be."<sup>5</sup> On January 18, 2024, just days after the initial strikes, in response to a question on their effectiveness, President Biden commented "Well, when you say "working," are they stopping the Houthis? No. Are they going to continue? Yes."<sup>6</sup> These statements from the top of the U.S. chain of command reveal that the current strategy against the Houthis is not working, has not been working, and is not going to work if it continues.

### **A Cost/Benefit Nightmare**

The continuation of this failed strategy must cease, as it will not solve the issue at hand, and the Red Sea crisis is a prime example of a problem that the United States is likely to face for the foreseeable future and needs to prove that it is adaptable to. The proliferation of cheap, yet effective, weaponry can turn economically weak parties, like the Houthis, into a comparatively well-equipped force, and allow them to wage disruptive campaigns against strategic interests, such as global commerce. This creates a cost/benefit scenario that does not favor responding powers, as the costs it takes to deploy defensive weaponry and launch retaliatory strikes is far more expensive than it is to launch cheaper drones and missiles at nearby ships or infrastructure.

So far, it is estimated that Houthi disruptions to Red Sea shipping have cost \$2.1 billion in maritime trade due to the dramatic drop in ships passing through the Suez Canal, with potentially 60% of ships choosing to take the longer route around Africa. In response, the United States has spent \$4.86 billion dollars responding to the Houthis.<sup>7</sup> While the shipping costs will certainly impact costs for U.S. consumers, the losses will be far more strongly felt in markets in Europe, Asia, and the Middle East, as costs rise

for products like consumer goods and energy. This reality should raise concerns that the United States is continuing to overspend on a problem that lays outside of its primary interests. This is especially apparent when comparing the cost of U.S. hardware to that being deployed by the Houthis. The Houthis are currently being supplied with cheap drones, primarily from Iran, which can run as low as \$2,000 apiece. A more expensive model can be around \$20,000.<sup>8</sup>

The decision to use B-2 stealth bombers and Tomahawk missiles against the Houthis shows that the U.S. military is willing to use some of its most expensive weaponry despite the inability to effectively deter or neutralize the threat.<sup>9</sup> The Houthis also have a stockpile of missiles, including ballistic missiles, that can be used against ships as well as land targets, and while those appear to be more effective, resulting in the sinking of two merchant vessels the optimum ones are used more sparingly and do not appear to be the weapon of choice they use in most of their attacks.<sup>10</sup> The more common use of cheap missiles results in the use of far more expensive interceptors by the U.S. Navy.<sup>11</sup> This issue is intensified by the Houthis ability to nimbly adapt to strikes against their positions, a strategy they have developed over years of conflict, to further alleviate the impact these strikes have on their capabilities.<sup>12</sup> This imbalance in cost will be a major hurdle for an administration that seeks to better prioritize its interests in its foreign policy and defense strategy.

## **Multipolar Challenges**

This is especially true when considering how the United States must operate in an increasingly multi-polar world. The resurgence of great power competition and revisionist middle powers will increase challenges to U.S. primacy in a multitude of ways. One such method is already underway in the Red Sea, as Russia and Iran lend support to the Houthis by providing weaponry and intelligence. The relationship between the Houthis and Iran has long been established, as the Houthis are a key node in the Axis of Resistance. This has resulted in Iran and other Axis members providing the Houthis with weapons, weapons components, and training to conduct their activities in the Yemen civil war, the war against Saudi Arabia, and their disruption of Red Sea trade.<sup>13</sup>

A recent report alleges that Russia had been helping provide targeting assistance for the Houthis in the Red Sea.<sup>14</sup> There are additional reports that Russia had considered selling missiles to the Houthis as well, although as of now it appears that such a deal has not been made, yet it remains a potentiality.<sup>15</sup>

Along with China's decision to essentially ignore the Red Sea crisis, these examples show that the challengers to U.S. global leadership can easily lend support to disruptive forces to draw the United States into costly yet unproductive engagements that drain U.S. resources and harm its credibility. It is conceivable that these foes, along with other U.S. rivals and adversaries, such as North Korea or Venezuela, could seek to aid other disruptive forces in places like Africa, Asia, or even Latin America. The proliferation of cheap drones and missiles could create incentives for rebels, terrorists, and criminal organizations to acquire these materials, as well as for revisionist powers to provide them, and achieve their goals through low cost/high yield disruptive actions.<sup>16</sup> The United States will have to be more selective in what it can respond to, especially since the cost of procuring and using advanced weaponry shows that there are limitations to what the United States can afford to do while credibly pursuing and defending its primary interests.

One area where this is now on display is the Indo-Pacific. The United States has put immense stock in preventing China's rise to regional hegemony in the Indo-Pacific region, with the defense of Taiwan being the lynchpin to these efforts.<sup>17</sup> While protecting the island should primarily fall on the Taiwanese and a coalition of local partners, the United States maintains a strong interest in providing Taiwan with enough support to deter Chinese aggression until such a coalition is properly positioned and equipped to mount its own self-defense. Additionally, establishing a strong deterrence against China should not negate diplomatic efforts to find areas for cooperation. Nevertheless, Taiwan is a major trading partner for the United States, greater than Middle Eastern states, and despite efforts to re-shore or near shore chip manufacturing sites to the United States, Taiwan will remain a key source for vital technologies.<sup>18,19</sup> Taiwan's vitality and concerns over China's rise maintains the heightened probability of involvement in a war should China soon move against Taiwan.

## **Burning Through Munitions and Credibility**

The current policy in the Red Sea is imperiling that approach as the U.S. Navy is burning through the munitions that would be necessary to supply Taiwan and U.S. Navy assets in the Indo-Pacific with if a war breaks out. As the potential National Security Advisor to future President Trump, Representative Mike Waltz, told Politico in August regarding the Red Sea mission, “Our fleet is getting worn out. We’re shooting off the missiles we need to defend against the Taiwan scenario.”<sup>20</sup> This is a reference to the number of the SM-3, which is believed to be the most effective against Chinese missiles, as well as the SM-2 and SM-6 interceptors, among several other defensive missiles, that are being launched by the U.S. Navy against Houthi drones and missiles. The issue is not limited to defensive weaponry, as there are also concerns over the number of Tomahawk missiles that have been used against the Houthis.<sup>21</sup>

Both the offensive and the defensive capabilities of the U.S. Navy are being depleted in the Red Sea against the Houthis, and there are compounding fears that the United States is not currently able to adequately resupply the Navy based on assessments of Pentagon procurement packages.<sup>22</sup> This is especially grave considering what the estimations of U.S. Navy missiles needs are for a potential conflict with China, which may involve using 5,000 long range missiles in just three weeks.<sup>23</sup> Additionally, this issue will exacerbate the problem the United States faces in providing pre-existing arms sales to Taiwan, as the United States has incurred a hefty backlog of unfulfilled shipments.<sup>24</sup>

This reality should dominate thinking about how the United States should approach the Red Sea crisis. A continuation of the status quo or a decision to further escalate against the Houthis could have drastic consequences for the United State’s position in the Indo-Pacific. The expenditure of additional munitions at similar or at increased rates against the Houthis will further compound this issue and increase the likelihood of retaliation from other Axis of Resistance members and potentially Iran against ships in the Red Sea, U.S. troops currently stationed throughout

the Middle East, and any additional troops that could be deployed as part of a new operation in the region. These would incur massively increased cost on an already stretched defense industrial base and U.S. weapons stockpile from continued responses to these attacks.

Additionally, any escalation that involves maintained or increased deployments to the Middle East will continue the recurrent cycle of attacks and responses against U.S. troops that stymie attempts at drawdowns, while continuing to put troops at risk in perilous deployments that are superfluous and unnecessarily expose them to danger.<sup>25</sup> And while measures can and should be taken to address the weapons procurement and stockpile issues, it is unlikely that such actions would go unnoticed and unmatched by rivals. Furthermore, massive increases in defense spending would be meaningless if the refurbished arsenal were continuously expended in theaters of limited interest, and such measures would incur domestic political challenges and consequences given present concerns over the national debt, spending allocations, and inflation.<sup>26</sup>

Finally, the United States needs to maintain the perception that it is a credible actor. An eroding of credibility would hinder its ability to work with partners and engage with adversaries. U.S. credibility is diminished when it takes on roles and missions that do not match its interests, which thwarts its ability to adequately resolve the issue at hand.<sup>27</sup> Forwarding a U.S. led military solution to the Red Sea crisis, and any similar future crisis, would put U.S. credibility to the test, which it already encounters in various other scenarios around the world. In the face of the most pressing threat to its interests in the Indo-Pacific, the United States will need to be more selective when it comes to applying military force.

## **American Defense of Maritime Trade from the Dawn of the Republic Through the Unipolar Moment**

The founders of the United States and Framers of its Constitution acknowledged that America would play a vital role in the world as a maritime commercial republic. In The Federalist Papers, Publius (the pseudonym for the combined writings of John Jay,

Alexander Hamilton, and James Madison), wrote of America's potential to utilize its vast resources to become a major trading power, and noted that America would need to develop a naval force to defend that trade.<sup>28</sup> President George Washington echoed these sentiments in his Farewell Address, noting that the "The great rule of conduct for us in regard to foreign nations is in extending our commercial relations", but also warned against "foreign entanglements", that do not comport to American interests.<sup>29,30</sup>

These views emerged from many Founders who wanted the United States to take full advantage of the geographic phenomenon that separated America from the Old World and avoid unnecessary engagements in European affairs, while recognizing the importance of international trade. This principle has guided the United States through several crises and conflicts; however, history shows that policies favoring realistic objectives tied to tangible assets are more successful than those with idealistic goals guided by lofty and ill-defined aspirations outside of direct American interests.

## **Military Responses in North Africa and Somalia**

The Barbary Wars were the first American engagement in conflict outside of the New World, with the explicit intent of protecting American commercial interests threatened by piracy from North Africa. After several American ships were captured, the United States, newly independent and lacking a sufficient navy or suitable coalition of allies, was forced to begin paying tribute for its ships to safely pass through the Mediterranean Sea.

As the tribute price rose, newly elected President Thomas Jefferson, a long-time enemy of the Barbary Pirates, chose to launch a military campaign against them with the rejuvenated U.S. Navy. The first war lasted from 1801-1804 and focused on Tripoli. The second Barbary War began in 1816, after Algiers, which had sided with the British in the War of 1812, demanded increased tribute payments, and President James Madison once again deployed the Navy to North Africa. Both wars resulted in victory for the United States, shielded it from paying tribute to the Barbary States, and ended U.S. conflict

against them, as their ships were no longer targeted, securing free navigation for the United States in the Mediterranean.<sup>31</sup>

While these military victories are notable and show that force can be used to successfully secure commercial interests, there are some qualifications that must be noted for thinking about the utility of the Barbary Wars as instructive lessons for current strategy. While it is true that these wars did secure safe passage for American ships, the limited nature of the wars left the Barbary States intact and allowed them to continue their piracy. It was not until 1830, when France conquered Algiers and incorporated it into its colonial system, that the Barbary piracy ended.<sup>32</sup> It is important to note that until a local power had used totalizing force to subjugate the enemy, the risk of piracy remained. The Barbary States had previously reneged on their agreements with the United States, and there was no guarantee that they would permanently adhere to the new agreements had they not been conquered. Additionally, these combat missions lacked serious risk of larger conflict with a more substantial power which could have dragged the mission outside of direct U.S. interests. While the Barbary States maintained connections with the nearby Ottoman Empire, the Ottomans never demonstrated a will to wage a wider war over them.

A more recent example of U.S. military intervention for commercial purposes is the naval operations against pirates around the Horn of Africa. Responding to growing pirate operations near the Gulf of Aden, the coast of Somalia, and the Indian Ocean, the United States took lead in multiple operations with other members of the North Atlantic Treaty Organization (NATO), to disrupt and deter piracy. This included sending naval vessels to patrol the waters most affected by piracy, defend commercial ships under attack, and assault pirate crafts. This mission also involved efforts to assist local and nearby states in building their capacities to engage in anti-piracy operations of their own. Overall, the three major operations undertaken by the US-led coalition between 2008 and 2016 appear to have been largely successful in their goal of deterring piracy in the region.<sup>33</sup>

While this example demonstrates that U.S. military force maintains the potential to be effective, there are some conditions that need to be addressed lest

the wrong lessons be drawn from it. The pirates, mostly from Somalia, were an extremely poor, weak, untrained, ill-equipped and isolated group of actors. Somalia is known as one of the poorest and least developed countries in the world, which greatly inhibited the material means of the pirates that used it as a base of operations. Unlike other disruptive forces, the Somali pirates lacked the backing of more developed and capable actors and were not a unifying power in their own region, having at best a strenuous relationship with local groups like al-Shabaab.<sup>34</sup>

Additionally, the isolation of the pirates in that region eliminated the risk of a major war in the Horn of Africa and allowed for an operation limited in scope (strictly being anti-piracy patrols and strikes) to be sufficient to their degradation.

## **Waging the Peace During the Suez Crisis**

The United States did not always rely on military means to resolve an issue related to trade route concerns. The Suez Canal became a flashpoint in the Cold War when in 1956, Egyptian President Gamal Nasser nationalized the canal and closed the Straits of Tiran to Israel. After months of negotiations failed, Britain, France, and Israel, developed a plan to attack Egypt and secure the Canal Zone, and successfully enacted it in late October. This put President Dwight Eisenhower's Administration, which sought continued negotiations, in a serious dilemma, as the Soviets promised to intervene in Egypt if the invading forces did not withdraw, even proposing to use nuclear weapons, and were concurrently repressing a revolution in Hungary.

President Eisenhower was faced with three major predicaments; one being how the United States, as a newly established post-World War II superpower, would react to its allies acting against its desires; the next being how the United States could seek a moral high ground over the Soviets if it denounced Soviet aggression in Hungary but supported its allies' aggression in Egypt, and lastly, how would America respond to further escalation if the Soviets did intervene in Egypt.<sup>35</sup> In the end, President Eisenhower opted to use American leverage over its allies to force a ceasefire and withdrawal. For the British and the French, still recovering after World War II's devastation, Eisenhower's cessation of economic aid

and oil sales were too great a burden, and they, along with the Israelis, were forced to recognize Egypt's control over the canal.<sup>36</sup>

While there is debate over the merits of Eisenhower's reasoning for his actions during and after the crisis, they present a very clear lesson. The Egyptian nationalization of the Suez Canal certainly presented a challenge to a vital global trade chokepoint, however, the levels of risk differed significantly between the United States and its European allies given the canal's greater importance to Europe than to the United States. For Eisenhower, the more critical hazard was related to the Cold War with the Soviet Union. Eisenhower determined that supporting his allies' actions was not worth the peril of a conflict with the Soviets, nor was it worth the potential degradation of U.S. global opinion relative to the Soviets. As controversial as his decision remains, it shows that the United States can use diplomacy to solve issues related to global trade, even if it means leveraging its allies into accepting a status quo they do not prefer, and that it can do so without long-term decay to its relationships despite short-term deteriorations.

## **Policy Recommendations for a Sensible Red Sea Response**

The United States needs to transform its policy towards the Houthis and the Red Sea crisis, and it should be a priority for the incoming Trump Administration to alter course. The new administration should consider a variety of tools and resources at its disposal with a willingness to use both carrots and sticks, with the primary goal being to reduce commitments to the region, ideally with a diplomatic deal or local security structure in place that maintains safe passage for commercial vessels through the Red Sea. However, a military drawdown from the region should not be dependent on the presence of a deal or alternative security structure, as the United States should be seeking to de-prioritize its armed presence in the Middle East in the long term, so that it may better focus on matters more directly relevant to its interests, primarily China and the Indo-Pacific region.

Additionally, it should be acknowledged that any deal struck, or action taken will have consequences and trade-offs, but these should also not distract from

the greater imperative of shifting priorities in an increasingly volatile multipolar geopolitical landscape the United States currently faces and will continue to confront for the foreseeable future.

## Proposals for a Diplomatic Solution

A diplomatic solution to the Red Sea crisis may prove to be a difficult and controversial strategy, as it could require engagement with rivals and adversaries and imposing constraints and responsibilities on allies. However, it should not be disregarded, as diplomatic engagement can ease the military drawdown in the region without the risk of escalation and increase the United State's perception as a deal maker rather than an intrusive or destabilizing force. One potential diplomatic path would be to address what the Houthis claim is the reason for their actions, the war in Gaza.<sup>37</sup> The violence has been raging since Hamas conducted its attack on Israel on October 7<sup>th</sup>, 2023, with the conflict spreading into Lebanon as Israel has invaded the southern part of that country to erode Hezbollah's control there. The Houthis have also sent missiles into Israeli territory, which Israel has fiercely responded to with strikes of their own in Yemen. The war has taken a devastating toll on the population in Gaza as Israel pursues its primary mission of completely defeating Hamas. This has hindered efforts at normalization between Israel and its Arab neighbors, as the plight of the Palestinian's has become a major sticking point for Arab leaders.

The United States could seek to continue the laudable efforts at regional normalization between Israel and its Arab neighbors sought through the Abraham Accords while addressing the areas that had been lacking in the original plans, primarily that the Palestinian issue was largely uninvolved, and that U.S. primacy in the region be continued to back up the Arab posture against Iran.<sup>38</sup> A comprehensive peace process this expansive would require complex diplomatic engagement with Israel and its Arab neighbor to reach a point where Israel agrees to a ceasefire and the Arab states agree to take a larger role in managing affairs in the Palestinian territories, while overcoming additional obstacles such as securing the release of the remaining hostages held by Hamas. The United States could employ a variety of economic incentives for the concerned parties, based on the developments brought about through the Abraham Accords.<sup>39</sup>

However, due to the massive changes in the region over the past few years, the United States may require more confrontational approach and consider negative incentives, such as conditioning arms sales and economic arrangements to bring these parties to the table. This could include a controversial reversal of current policy to compel Israel to cease their military operations, allow for increased aid to Gaza, and work with its Arab neighbors towards a peace deal.<sup>40</sup> The United States would take similar steps with the Arab states, since they may need a push to diplomatically engage the Israelis and constrain Hamas, given the resistance those leaders would face at home.

This strategy would entail serious risk of alienating partners in the region, particularly Israel. It would also face major domestic pushback, especially by those who would argue that continuing to aid Israel in its multi-front war would be beneficial, as it could eliminate and degrade regional threats, including the Houthis, without direct U.S. intervention, especially as these adversaries are currently perceived to be vulnerable. While the parallels between Israeli and American security interests should be considered, measures to restrain Israeli actions have been undertaken by previous Presidents, including President Ronald Reagan, when they were perceived to be at odds with American interests, without incurring long-term harm to the U.S.-Israeli relationship.<sup>41</sup> Given the recurrence of the Palestinian issue as a barrier to regional peace, the United States should deliberate a broader approach towards securing a political resolution to the matter.

Another potential problem is that this path would legitimize the Houthi's claim that their actions are exclusively tied too events outside of the civil war in Yemen, a claim which may not be true given their actions against shipping prior to the current conflict in Gaza. Additionally, despite the consistent rhetoric in support of the Palestinians, Arab leaders may seek an agreement that ignores that issue, and instead pursue a lopsided deal contrary to U.S. interests in return for engaging Israel, such as the arrangement floated with Saudi Arabia that included U.S. security guarantees for the Kingdom.<sup>42</sup>

The United States could also increase sanctions against Iran, likely against its energy sector, which

may coerce Tehran to negotiate with Israel and the Arab states to cease hostilities. This would also cut the Houthis and other Axis of Resistance forces from their primary ally and benefactor. One drawback to this move could be that it may strengthen the Iranian regime's position if it is capable of constructing an economy better able to withstand and evade sanctions, what has been dubbed a "resistance economy".<sup>43</sup> Additionally, as has been demonstrated in Russia after its invasion of Ukraine, massive sanctions don't necessarily cause immediate economic ruin, as many U.S. rivals and competitors have established a growing alternative economy to the Western system.<sup>44</sup>

A sanction regime could push Iran further into this emerging alternative system, a move that Iran has already started by joining groups like BRICS and the Shanghai Cooperation Organization (SCO), and spare it the worst of the sanctions effects.<sup>45</sup> Providing off ramps for Iran to get sanction relief in exchange for cooperation could hedge against those potential shortcomings and offer space for further engagement related to issues such as Iran's nuclear program, which Iran has suggested it is open to.<sup>46</sup>

Another potential diplomatic path to consider is to engage directly with the Houthis. This could involve a promise to recognize the situation on the ground in Yemen, that the Houthis are a de-facto government that has survived decades of civil war and invasion from neighbors, control a large geographic and populous portion of Yemen, and have set up their own quasi-state apparatus in their controlled territories.<sup>47</sup> This type of diplomatic action could be used to induce a cessation of actions against shipping in the Red Sea, as normalization and de-escalation could allow for increased aid to enter Yemen to help with the ongoing humanitarian crisis that has plagued that country for years. This could also be a pathway that does not necessitate a cessation of hostilities in Gaza and Lebanon. A peace process between Israel and its neighbors may prove to be a difficult and prolonged course, which, even if successful, would maintain that Houthi actions remain tied to the actions of outside parties.

A deal that offers the Houthis limited recognition would put the onus to cease activities more directly with them, and potentially deny them the justification for their activity that they currently use.<sup>48</sup> Moreover,

recognition of the status quo regarding a group with similar status to the Houthis' standing in Yemen would not be unprecedented and may even open the door to increased interactions with their neighbors, including the other factions within Yemen, and could further restrain the Houthis' actions against trade in the region. The United States could also use the terrorist designation label as leverage over the Houthis for renegeing on any deal to cease activities. However, such a plan could have significant drawbacks, as many U.S. partners and allies would certainly balk at the prospect of recognizing the Houthis, particularly Israel and Saudi Arabia. Additionally, the United States should remain cognizant of setting a precedent that legitimizes and encourages the disruptive activity that the Houthis have engaged in.

## **Proposals for a Local Security Structure**

While a diplomatic deal should be considered, U.S. strategy towards the Houthis should not be dependent on one, especially considering the difficulty that securing such deals would endure. The United States should also seek to help develop a security structure of nearby and local powers that can take on a renewed role of securing the Red Sea trade routes should the Houthis choose to continue their disruptive activity. A strategy that engages in buck passing to partners that have a greater stake in trade that flows through the Red Sea and Suez Canal, such as local Arab powers, European allies, and Asian states, could help facilitate a U.S. drawdown in the region while ensuring that an alternative military response to Houthi activities will remain as a deterrent or responsive force.<sup>49</sup>

## **Egypt**

The United States has several methods it can employ to help spur this response from these other interested powers. One such method is to utilize leverage on local powers, such as Egypt, to act against the Houthis and secure the Red Sea. The United States continues to send billions of dollars of military aid to Egypt for often vague security purposes, despite the mounting human rights concerns regularly expressed by lawmakers and activist groups against the Egyptian government.<sup>50</sup> One of the few concrete reasons given for the aid is the continued stability of the Suez Canal so that shipping may endure, and Egypt can continue to collect remittances from this trade and sustain an



already struggling economy and regime.<sup>51</sup>

However, there are limitations to how much leverage the United States can enact on Egypt, as much of the aid is not liable to waivers and is tied to upholding Cairo's 1979 peace agreement with Israel.<sup>52</sup>

Additionally, there are considerations as to how durable the current regime would be to new economic issues or being seen to move against an actor aligned with the Palestinians, a cause still important to the Egyptian people. Despite these potential issues, this path should not be taken off the table. The Egyptians have already shown that they are willing to engage in military activities against forces that may threaten the Red Sea, such as their increased activity in Somalia against al-Shabaab, which may be seeking a deepened relationship with the Houthis.<sup>53</sup> If the Egyptians are unwilling to take the necessary steps to secure trade through the Suez Canal, then the United States should consider saving its aid money for a more beneficial purpose.

### **Saudi Arabia**

Another potential Red Sea actor that the United States could engage is Saudi Arabia. Considering the United States just recently ended its ban of offensive weapons to the Saudis due to their conduct in their war in Yemen, it may seem counter-productive to encourage them to re-engage against the Houthis.<sup>54</sup> However, the United States can continue to place strict conditions on these weapons sales, ensuring that any actions against the Houthis must be within limits set by the United States lest the ban be reenacted. One practical way this can be instituted is inducing the Saudis to re-initiate enforcement of the international arms embargo set by the United Nations Security Council Resolution 2216. The apparent cessation of this action by the Saudis in recent years has contributed to the increased arms smuggling in and around the Arabian Peninsula and allowed the Houthis to radically expand and improve their arsenal.<sup>55</sup> Resolution 2216 allows for an internationally recognized framework to prompt and legitimize Saudi action and simultaneously continue peace negotiations in Yemen. Meanwhile, the looming punishment of offensive arms sale bans can once again compel the Saudis to avoid engaging in behavior that further contributes to devastation in Yemen.<sup>56</sup>

### **Local Actors**

The United States could also provide support to other actors within Yemen. The internationally recognized government of Yemen is currently run by the Presidential Leadership Council (PLC), which has brought together disparate groups to negotiate with the Houthis after a ceasefire went into effect in 2022. However, the PLC remains in a weak position relative to the Houthis and faces several struggles in the ongoing peace talks to try and officially end the civil war. The PLC currently lacks diplomatic and material support from the United States and is divided through competition from Saudi Arabia and the United Arab Emirates (UAE), as they vie for influence in the remaining non-Houthi controlled portion of Yemen.<sup>57</sup> This competition exacerbates the pre-existing fissures within the PLC, primarily that part of the PLC is the Southern Transitional Council (STC), which seeks to reconstitute the former state of South Yemen. The United States could exert diplomatic influence over the Saudis and the UAE to cease their contentious activity in Yemen and help promote a more unified PLC. This united force could be further empowered by military support, through arms shipments and coordination with U.S. and allied military forces against the Houthis. This plan could greatly improve the PLC's position in negotiations with the Houthi's and potentially further degrade the Houthi's position with Yemen.<sup>58</sup>

While this strategy may appeal to the desire to see a new, more stable power arise in Yemen, it carries immense risk. The push for coordination between the Saudis and the UAE would be a tricky foray into intra-Gulf power competition. Mismanagement of that diplomatic effort could exacerbate the issue and hinder efforts at wider regional de-escalation. And even if that issue were resolved, it would not settle the differences between the factions within the PLC. The danger of reigniting the Yemen civil war by sending more arms into the country with the intention of degrading the Houthis has great potential to backfire, as have similar endeavors throughout the Middle East and Africa. There is no way to guarantee that the competing factions will remain united, and refrain from turning on each other as they seek power for themselves. Additionally, renewed conflict could lead to the spread of other jihadist movements, such as Al-Qaeda in the Arabian Peninsula, which grew during the civil war.<sup>59</sup> Any attempt at engagement with the PLC should be

extremely cautious of these possibilities.

## **European Partners**

As for the Europeans, much like the push for burden sharing in the posture against Russia is becoming a reality, so must it be regarding Europe's periphery.<sup>60</sup> The United States can continue to work with its NATO allies as a supportive force; however, the United States must encourage and compel the Europeans to take a more proactive step towards building their own military capabilities capable of securing objectives that are more within their interests than those of the United States. The Red Sea and Suez Canal are a clear example of this based on trade considerations and geography. About 40% of trade and nearly all maritime transit between Europe and Asia passes through the Red Sea, and the waterway is vital for European energy needs.<sup>61</sup> Meanwhile, the United States remains a net energy exporter, with potential for greater energy independence with increased domestic oil and gas production as well as developments in alternative energy sources. So far, Europe's response, other than British involvement in Prosperity Guardian, has been the European Union's Operation Aspides. This has a limited defensive mission in which a small deployment of participating country's naval vessels escorts commercial ships through the Red Sea, only protecting them from attack, never conducting strikes against the Houthis.<sup>62</sup>

The credible signal of a U.S. military drawdown in the Middle East would potentially provide a necessary shock to the Europeans, spurring action in a region that matters more to them. One way to do this would be strongly indicate that the United States intends to use put its resources on matters more directly related to its interests. One such interest could be the Panama Canal. Not only is this canal historically tied to U.S. ingenuity and activity in its own hemisphere, but it remains the most important trade artery for the U.S. economy, with 40% of U.S. container traffic annually passing through it.<sup>63</sup> The Panama Canal is currently facing issues of its own, as a recent drought in Panama caused the canal to restrict vessel passage for several months, causing disruptions to the global supply chain and trade.<sup>64</sup> Additionally, there is growing concern over Chinese influence in Panama and the Canal zone.<sup>65</sup> The United States could indicate that it would rather focus on guarding the Panama Canal against

droughts and Chinese influence than increasing its military budget to continue to guard the Red Sea against the Houthis.

An increased European role can involve military campaigns, such as strikes against the Houthis and policing interdictions against arms shipments into Yemen, or, taking a greater role in diplomatic solutions with interested parties. A push for European states to become more active in their neighborhood will certainly come with challenges, particularly since many European navies have long been underfunded, and those states with military means remain focused on supporting Ukraine against Russia's invasion.<sup>66,67</sup> However, given the necessity of naval imports for European industry and the growing desire for autonomy on the continent, the United States must cease enabling European states to shirk their burdens and help make Europe a more self-sufficient region.<sup>68,69</sup> Such a strategy will cause anxiety for some, particularly regarding fears over Russia, but prospective pathways suggested, such as Dormant NATO, adequately address these concerns.<sup>70</sup> While the United States may have at one point seen fit to compel the European powers to disengage from the Suez Canal, the conditions today are materially different, as Europe is no longer devastated by a world war, the United States and Europe do not face a USSR-like threat, and the United States's genuine geopolitical rival, China, does not appear interested in deeply involving itself in this issue.

## **China or India**

Despite Houthi assurances that Chinese vessels would not be attacked, there have been several strikes against Chinese ships. China has repeatedly called on the Houthis to cease their activity and on Iran to rein them in, but this has also been to no avail.<sup>71</sup> For the time being, it appears that China is content on free-riding U.S. security operations so that it can maintain its perception as peacemaker in the Middle East and not disrupt its delicate relationships with Iran, Saudi Arabia, and the Houthis themselves.<sup>72</sup>

The situation is similar with another Asian power, India. While the Indian Navy has played a slightly more proactive role in the Red Sea crisis, it has restrained from military action against the Houthis, having turned down an invitation to join Operation

Prosperity Guardian, and instead opted for discussions with Iran.<sup>73</sup> Despite India flexing its naval muscles against pirates in the Indian Ocean, it has chosen a measured diplomatic response in line with its position as a middle power in an increasingly complex geopolitical environment.<sup>74</sup> India's unique relationships and position relative to the United States, Russia, China, Iran, Israel, and many European states, may provide avenues for India to be a mediator for a diplomatic solution to the crisis.<sup>75</sup>

Whether a U.S. drawdown in the region will compel China to take a more militaristic approach to a region that it seems increasingly invested in remains unclear. Several countries in the Middle East have been beneficiaries of Chinese infrastructure investment, especially since Red Sea states like Egypt and Saudi Arabia play a significant role in China's Maritime Silk Road project.<sup>76</sup> The potential for prolonged disruptions to shipping through the Red Sea and the negative economic impact it would have on these countries could jeopardize China's ambitious plans, causing it to reconsider its involvement should the United States cease military activity. Regardless, there is no reason to continue to take a lead role in a region that China has far more interest in, especially when it can compromise the United State's posture relative to China's in a region that is far more crucial to U.S. long term interests- the Indo-Pacific.

## Conclusion

History shows that the United States has a demonstrated interest in securing naval commerce, primarily regarding its own trade needs. This can include using military force to these ends. However, the U.S. government has also used diplomacy to de-escalate conflicts related to trade when it is determined to be against its own interest. The current crisis in the Red Sea with Houthi attacks on shipping present a scenario that falls within American interests, but not a significant one. This also comes at a time when the United States needs to be prioritizing its more pressing concerns, primarily in the Indo-Pacific, and de-prioritizing regions like the Middle East, which present fewer direct benefits and diminishing returns for continued military engagement. Therefore, it is necessary that the United States seek to drawdown from its mission in the Red Sea, preferably with a

diplomatic deal that secures commercial travel through the Red Sea, or a security structure in place that emphasizes the role of local or nearby actors to police the Red Sea and deter the Houthis.

However, while a deal or alternative security structure is ideal, a near-term U.S. drawdown from the Red Sea should not be dependent on either of those occurring, as the United States needs to cease depleting its arsenal in the region and prioritize its remaining and forthcoming munitions for its posture in the Indo-Pacific. While the timeline is negotiable, statements by Chinese leadership suggest that the sooner this takes place, the better positioned the United States would be to work with its partners to deter action against Taiwan, which is far more imperative for U.S. interests.

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