

The Houthi Conundrum: Competing U.S. Counterterrorism Priorities in the Middle East

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Setting the Stage: Introduction to Yemen, the Houthis, and American Counterterrorism Priorities in the Middle East and Horn of Africa

The state of affairs in Yemen is politically fractured, a result of the now-stalled civil war that has been raging since 2015. Some five different military administrations currently control meaningful swaths of Yemeni territory, each with their own religious, ethnic, and tribal origins as well as international backers. Ansar-Allah, colloquially referred to as the Houthi movement, currently controls roughly 70% of the Yemeni population, albeit in a relatively small area of territory in the northwest of the country. Ansar-Allah is led by members of the Houthi family who adhere to Zaidi Islam, a sect Shiite Islam theologically distinct from the dominant sect of Islam in the current Iranian regime and Hezbollah.¹ The Houthi-controlled territory abuts the Bab el Mandeb Strait and the Red Sea, providing strategic access to a vital shipping node through the Suez Canal, which the Houthis have leveraged both to import weapons and to commit acts of maritime terrorism. Following the October 7th attacks by Hamas in Israel, the Houthi movement, which has long professed its support for the Palestinian cause, joined the war against Israel by initiating a targeted campaign of drone and missile attacks on both Israel proper as well as civilian ships in the Bab el Mandeb region.²³

Houthi attacks against civilian shipping had, and continues to have, a drastic impact on the volume of shipping transiting the Red Sea and Suez Canal. Several attempted operations to protect shipping, degrade Houthi strike abilities, and deter future attacks have had limited strategic impact despite some tactical victories. The first operation, Prosperity Guardian, saw the formation of a U.S.-led coalition committed to “ensuring freedom of navigation...and bolstering regional security.”²⁴ The coalition lacked key partners, including Egypt, Saudi Arabia, and France, underscoring the political sensitivities of aligning, albeit informally, with Israel. In addition to the U.S.-led coalition, the European Union (EU) initiated a purely defensive naval operation tasked with defending and escorting civilian ships through the high-risk waterways around western Yemen, called Operation Aspides. Aspides, under joint EU and Greek command, has had limited success in deterring Houthi aggression, but has successfully escorted dozens of ships through the Bab el Mandeb Straits and defended against drone and missile attacks. The operation, an attempt to balance a general desire amongst European leaders to protect civilian shipping with a popular reluctance to align with Israel, is still ongoing and includes the participation of several key European navies, notably France, Germany, Italy, and the Netherlands, in addition to the Greek command.⁵

Kinetic strikes by the U.S. and United Kingdom (UK) began two days after the United Nations Security Council (UNSC) passed Resolution 2722 which condemned the Houthis and their continued disruption of international waterways. The initial wave of attacks were widespread and intense, though the rate of attacks slowed to a consistent, low-intensity air campaign titled Operation Poseidon Archer. The campaign continued until the implementation of the January 2025 ceasefire between Israel and Hamas, at which point Houthi attacks temporarily halted as well.⁶⁷ Following the collapse of the ceasefire in March, the newly inaugurated Trump

¹ Interview with SME, The Washington Institute for Near East Policy, November 12th, 2025

² Al Jazeera. “A Year After October 7, Houthi Red Sea Attacks Still Torment Global Trade.” October 5, 2024.

³ Baker Institute for Public Policy. “Blowback from Gaza: The Geopolitics of the Houthi Red Sea Campaign.” 2024.

⁴ U.S. Department of Defense. 2025. “Statement from Secretary of Defense Lloyd J. Austin III on Ensuring Freedom of Navigation in the Red Sea.” Accessed December 1, 2025.

⁵ European External Action Service (EEAS). “About Operation EUNAVFOR ASPIDES.” 2024.

⁶ International Institute for Strategic Studies (IISS). “Navigating Troubled Waters.” Research Paper, December 2024.

⁷ Eurasia Review. “US Offensive Against Houthis Delivered Limited Results – Analysis.” May 31, 2025.

administration announced the beginning of Operation Rough Rider, a campaign of sustained attacks against the Houthis to compel them to halt their attacks on allied naval assets and civilian shipping. The UK formally joined Operation Rough Rider in April 2025, and though the intensity of attacks was greater than that of Poseidon Archer, the long-term effects were similarly limited. After both the U.S./UK and the Houthis sustained losses, both sides agreed to a limited ceasefire.⁸⁹ Despite American rhetoric claiming to have secured concessions from the Houthis, namely a commitment to halt attacks against American ships, the Houthis remained unhindered to continue attacking both the Israeli mainland as well as any shipping the Houthis deemed connected to Israel in any way. Thus, the operation proved costly and strategically ineffective in deterring the Houthis or inflicting any meaningful lasting damage to their capabilities.

Both the Israeli air force and navy have struck the Houthis as well, in response to sustained drone and missile attacks which caused minimal damage but considerable societal disruption.¹⁰¹¹ The Israeli attacks differed significantly from those of the U.S.-led coalition due to a variety of factors including proximity and strategic doctrine. While analysts have assessed that the Israeli strikes were profoundly more disruptive to the Houthis than the U.S.-led coalition, in part due to a willingness to target critical infrastructure and political leadership in addition to missile launchers, weapons caches, and military bases, attacks against both Israel and international shipping continued, albeit sporadically, until the implementation of the current ceasefire in Gaza.¹²

Despite repeated attacks and the utilization of a significant amount of Unmanned Aerial Vehicles (UAVs) and missiles, the Houthis have maintained their ability to disrupt shipping and alter the geopolitical balance in the Red Sea and Middle East at large. With access to open waterways and a porous Yemen-Oman border, the Houthis have been able to secure a consistent flow of weapons from Iran and replenish their materiel stocks. Additionally, despite widespread poverty, crumbling infrastructure, and food insecurity, the Houthis have skillfully consolidated both their control of, and support from, the civilian populations under their control.¹³ Houthi leadership formed a new government in 2024 composed entirely of their own political members, and have taken major steps to limit judicial freedom.¹⁴ By embracing their role in the Gaza war and framing the international community, including the U.S., UK, United Nations (UN), and EU, as adversarial in the face of allied airstrikes, the Houthis have rallied popular support and suppressed meaningful dissent. This, coupled with the lack of a cohesive alternative to Houthi leadership, complicates a strategy in which the Houthis are overthrown or replaced.¹⁵ Ultimately, as the ceasefire in Gaza continues to hold, Syria continues to establish its new identity and role in the Middle East, Iran continues to support its proxy network and resist international efforts to curb its nuclear program, and remnants of Daesh continue to periodically commit acts of terrorism, the United States has a full plate of Counterterrorism (CT) priorities that it must balance with the desire to reestablish sustainable security in the Red Sea region. Despite calls

⁸ U.S. Central Command. “USCENTCOM Forces Continue to Target Houthi Terrorists.” July 2024.

⁹ Tiron, Oriana. “‘1,000 Targets’: Trump Expands Campaign Against Houthis, CENTCOM Says.” *Air & Space Forces Magazine*, 2025.

¹⁰ Times of Israel. “What Israel Did When It Struck in Yemen.” *Times of Israel*, 2025.

¹¹ Times of Israel. “Israeli Navy Carries Out Yemen Strikes for 1st Time, Targeting Houthi Port.” *Times of Israel*, 2025.

¹² April Alley, Interview with SME, The Washington Institute for Near East Policy, November 12th, 2025

¹³ Council on Foreign Relations. 2025. “War — Yemen.” *Global Conflict Tracker*. Accessed December 1, 2025.

¹⁴ ECFR. 2025. “The Paradox of Intervention: How U.S. Strikes in Yemen Empowered the Houthis.” May 13, 2025. Accessed December 1, 2025.

¹⁵ April Alley, Interview with SME, The Washington Institute for Near East Policy, November 12th, 2025

from both within the U.S. and from American allies, pursuing regime change in Yemen in the short term is not the key to securing such a state of regional calm.

Prior to the current Gaza ceasefire and the cessation of Houthi attacks on Israel, many voices both in Israel and the United States advocated for a comprehensive decapitation of Houthi leadership, and ultimately an overthrow of the Houthi regime.¹⁶ Undoubtedly, such voices still exist, though the appetite for renewed conflict at the current moment is limited, especially given the current competing priorities for both the U.S. and Israel. At the moment, the Hezbollah file remains at the top of the joint U.S./Israeli list of CT priorities in the Levant, followed by the ongoing efforts to secure security understandings in Syria, both domestically between various sectarian factions, and internationally between the new Syrian government and Israel.

In addition to Syria and Lebanon, recent elections in Iraq, coupled with the ongoing threats posed by Iran-backed militias and enduring pockets of Daesh influence, position the question of the Houthi regime as rather lower on the list of CT priorities for the United States. Furthermore, in the Bab el Mandeb region, ongoing instability and U.S. operations in the Horn of Africa countering the Islamic State and Al Shabaab draw substantial capital, both politically and financially, from overall U.S. CT operations.¹⁷¹⁸¹⁹ Finally, the pursuit of comprehensive regime change in Yemen would necessitate long-term nation building, counterinsurgency, and regional integration efforts, requiring years of sustained efforts. As such, the imperative nature of maintaining the ceasefire in Gaza, combined with the myriad of competing CT priorities in the general area, position the U.S. to prioritize stability and calm in the short term while working with regional partners, most notably Saudi Arabia and the United Arab Emirates (UAE), to align on an alternative governance plan for Yemen in the long term.

Civil War in Yemen: The Rise of the Houthi Movement

The Yemeni state has been politically fractured since the unification of North and South Yemen in 1990. The two areas of Yemen contain distinct populations, with the north hosting mostly Zaidi Shiite Muslims and various tribes, while the populations in the south have been influenced by Marxist thought, urban centers, and coastal trade. Sectarian grievances continued despite unification, and civil war erupted in 1994 after southern populations felt marginalized by the government, headed by President Ali Abdullah Saleh, a northern Zaidi Muslim. The secessionist movement was crushed, though political divisions persisted, which resulted in the rise of Ansar Allah, otherwise known as the Houthi movement. The Houthi's were founded by Hussein Badreddin al-Houthi, a Zaidi cleric and member of the elite Houthi family. The movement started as an attempt to revive the Zaidi Islamic identity to counter the spread of Saudi-backed Salafi Islam in the 1990s, but became a political movement around the beginning of the 21st century. Criticism of corruption within the Yemeni government under the leadership of President Saleh, as well as that of the large American presence following the invasion of Iraq spurred the movement to directly confront the state in 2004.²⁰ Hussein Badreddin al-Houthi was killed in clashes in 2004, at which point Abdul-Malik al-Houthi, just 25 years old at the time.

¹⁶ Times of Israel. "Liveblog – May 16, 2025." *Times of Israel*, May 16, 2025.

¹⁷ U.S. Africa Command. "U.S. Forces Conduct Strikes Supporting Somali National Army, Targeting al Shabaab." AFRICOM Press Release, 2025.

¹⁸ U.S. Africa Command. "Airstrike." AFRICOM Webpage, accessed 2025.

¹⁹ New America. "How Many Strikes Has AFRICOM Declared in Somalia in 2025?" New America Future-Security Blog, 2025.

²⁰ Council on Foreign Relations. 2025. "War — Yemen." *Global Conflict Tracker*. Accessed December 1, 2025.

From 2004 to 2010, the Houthi movement consolidated its strength and honed its skills both on the battlefield and political sphere, as they repeatedly clashed with the Yemeni state, at the time suffering from decreased oil revenues and political disunity.²¹ The 2011 Arab Spring marked the beginning of the end of the Yemeni State, which had survived in some form since the 1990 unification, and the state ultimately collapsed into all out civil war in 2014. Many different parties, tribes, and political movements fought for influence and power, but the Houthi movement, based in the Zaidi highlands in northwestern Yemen, successfully deployed the skills and weapons acquired during the previous decade of low-intensity conflict with the state, and seized the capital Sana'a in 2014. After failed negotiations with the president of the interim government, Abd Rabbu Mansour Hadi, Houthi forces stormed the presidential palace in early 2015, leading to the resignation of President Hadi, and cementing Houthi control in northwest Yemen. Over the course of the following decade, the Houthi movement, with Abdul-Malik still at the helm, consolidated its power, expanded its area of influence, and sustained a Saudi-led coalition air campaign to emerge in 2023 as the dominant political force in Yemen with control of a majority of the Yemeni population.²²

Iranian Involvement: A Case of Aligning Interests

The role of the Houthi movement in the war that followed the October 7th attacks, joining elements of the Axis of Resistance to attack Israel, has framed the Houthis as an Iranian proxy not unlike Hezbollah, Palestinian Islamic Jihad (PIJ), or the Popular Military Force (PMF) militias. However, despite the fact that Zaidi Muslims are technically Shiite, the theological and ideological congruency between Iran and the Houthi movement are somewhat limited. The Islamic Republic of Iran, itself a revolutionary movement, represents the dominant strain of Shiism in the middle east today. Known as Twelver Shiism, followers subscribe to a belief system that follows a line of 12 Imams who descend directly from the Prophet Muhammad through his daughter Fatimah. Zaidi Muslims, on the other hand, revere Zaid ibn Ali, who was not a member of the 12 infallible Imams. While Zaidi Muslims are technically Shia because they claim descentance from Ali and Husayn, they do not believe in the infallibility of Imams, a distinct divergence from the current dominant ideology in the Islamic Republic of Iran.²³

Understanding the religious similarities and differences between the Houthi movement and Iran is critical to understanding the working relationship between the two parties, especially when devising a holistic strategy to counter destabilizing forces in the Middle East from the American perspective. At the moment, two categories of such destabilizing actors dominate American CT policy in the Middle East: Iran-backed groups, typically Shiite (Hezbollah, PMF, Hamas/PIJ), and radical Sunni groups associated with Al-Qaeda and the Islamic State (Al Qaeda Arabian Peninsula (AQAP), Islamic State in Iraq and the Levant (ISIL)). The Houthi movement doesn't fall cleanly into either of these categories despite recent strategic alignment with Iran. The theological differences between Iran and the Houthi movement, as well as the grassroots, familial nature of the movement itself, distinguishes the Houthi movement from other groups such as Hezbollah. While Hezbollah was founded on the very same revolutionary Islamic theology that fueled the Islamic Revolution in Iran, with its leadership proudly adhering to the

²¹ Horton, Michael. 2015. "Abdul Malik al-Houthi: Yemen's Most Powerful and Most Wanted Man." *Militant Leadership Monitor*, May 31, 2015. Accessed December 1, 2025.

²² Interview with SME, The Washington Institute for Near East Policy, November 12th, 2025

²³ Interview with SME, The Washington Institute for Near East Policy, November 12th, 2025

will of Iran,^{24,25} the Houthi movement has and continues to operate independently, albeit with substantial support from their Iranian backers. Upon seizing control of Sana'a in 2014, what had been limited to channels of communication and advisory between the Houthis and Iran quickly expanded to training assistance and weapons supply lines. While Iran and the Houthis have remained aligned in the recent war with Israel, with the Houthis even contributing their own missiles to Operation True Promise I,²⁶ a prudent CT policy targeting the Houthi movement must recognize the independence of their decision-making and theological roots.

Competing Priorities: Gaza, Lebanon, Syria, Daesh, Horn of Africa

Gaza

There are currently four significant CT issues in the Middle East and Horn of Africa (HoA) which are drawing significant CT resources. Issues relating to Gaza, Lebanon, and Syria draw the most political capital out of any other regional CT issues in that order. Ongoing instability in the Horn of Africa represents an additional regional priority, despite not technically existing in the Middle East nor the CENTCOM Area of Responsibility (AoR). The current administration has committed a massive amount of resources, political, financial, and military, to freeing the hostages held by armed groups in Gaza and securing a lasting ceasefire between Israel and Palestinian militant groups.²⁷ The successful passing of UNSC Resolution 2803 concerning the next phase in Gaza, including the creation and deployment of an International Stabilisation Force, reflects one of the most comprehensive multilateral peace efforts in years, and underscores the importance with which the current administration has assigned to its success.²⁸

Though Hamas continues to resist disarmament, Israel has little to no domestic political appetite to break the ceasefire and disarm them by force. Moreover, as long as Hamas doesn't cause significant Israeli casualties in the near term, the United States will continue to restrain Israeli leaders from ignoring popular opposition to restarting the war anyway. Similarly, there is very little political will in the United States, both within the administration and amongst the populus, for American soldiers to deploy to Gaza for any reason, especially to disarm Hamas by force. However, despite the lack of American boots on Gazan soil, the United States is still overseeing the Civil Military Coordination Center (CMCC) and the multilateral efforts to maintain the state of relative calm. The efforts of the United States to facilitate alignment between so many influential actors in the Middle East, most importantly Turkiye, Qatar, Israel, and Saudi Arabia, have resulted in a tenuous but optimistic peace, and American efforts in the near term will be concentrated on maintaining the ceasefire, undermining Hamas attempts to resist disarmament, and ensuring the creation of the International Stability Force (ISF).²⁹

The current administration has touted the ceasefire and hostage release as a major political victory, and maintaining the ceasefire and continuing to follow the agreed-upon

²⁴ Asharq Al-Awsat. "Nasrallah: 'Khamenei Our Imam, Our Leader ... No Place for Neutrality in Any War Against Israel'." *Asharq Al-Awsat*, 2019.

²⁵ Israel National News. "US, Partners Target Houthi 'Senior Terror Operatives' After Gateway Strike." *Israel National News*, 2025.

²⁶ Wilson Center. "Timeline: Houthi Attacks (2023–2025)." *Wilson Center*, 2025.

²⁷ Al Jazeera. "US President Trump Says Israeli Captives to Be Released from Gaza on Monday." October 11, 2025.

²⁸ ABC News. "Security Council Vote Means Trump's Gaza Peace Plan Advances." *ABC News*, 2025.

²⁹ ABC News. "Trump, World Leaders Gather in Egypt for Ceasefire Deal Signing with Netanyahu Absent." *ABC News*, 2025.

roadmap remains the top priority for the U.S. in the Middle East.³⁰ The current status quo is intrinsically tied to countering, or at least preventing, additional harm to shipping and U.S. naval assets. The Houthi movement committed itself to adhering to the ceasefire in Gaza, in line with their official policy of striking Israel until Israeli operations ceased, despite not being a signatory to the agreement. As such, the United States continues to prioritize the success of the current Gaza ceasefire for both political reasons and to continue to benefit from the cessation of Houthi attacks.

Lebanon

Several dozen miles north of Gaza, the United States is similarly heavily invested in the ongoing year-long ceasefire between Hezbollah and Israel in Lebanon, where Hezbollah is also resisting Israeli and Lebanese efforts to ensure their disarmament.³¹ The current ceasefire, which came as a result of highly successful Israeli decapitation strikes against senior Hezbollah leadership, coupled with the collapse of the Assad regime in Syria and successful Israeli ground operations, has stalled. Though Hezbollah remains wary of responding to continued Israeli strikes targeting Hezbollah rearmament efforts, the Lebanese Armed Forces (LAF), despite seeking to regain the monopoly on the use of military force in Lebanon, remains unwilling or unable to sufficiently counter Hezbollah south of the Litani river. With LAF fighters receiving significantly lower salaries than Hezbollah militants in addition to a severe lack of adequate weaponry, the United States is currently concerned with preventing a reinvasion of southern Lebanon by the Israeli Defense Forces (IDF), which could upset not only the ceasefire in Lebanon, but also in Gaza.³² The American priority continues to be focused on the continuation of the ceasefire and the prevention of renewed fighting between Israel and Hezbollah. That being said, the U.S. also prioritizes the disarmament of Hezbollah, preferably by the LAF. As such, continued American efforts, working with both the Lebanese and Israeli governments, are focused primarily on ensuring the continuation of the ceasefire and the eventual disarmament of Hezbollah. Ideally, the U.S. can work with France to build the LAF into a force capable of disarming Hezbollah, while remaining acceptable to Israeli security concerns.

Israeli forces continue to strike Hezbollah commanders and weapons depots, though at a limited intensity. The United States has softened its opposition to Israeli strikes in the face of disappointing results from the LAF-led disarmament efforts. As with the ceasefire in Gaza, renewed hostilities between Israel and Hezbollah may motivate the Houthi movement to resume strikes on Israel, civilian shipping, or U.S. naval assets. Though the Houthi movement has not explicitly expressed loyalty to Hezbollah or the people of Lebanon in the same way it has with the Palestinians, the movement does remain an important, albeit independent, arm of the Iranian-led Axis of Resistance. Therefore, a breakdown of the ceasefire in Lebanon could lead to renewed Houthi strikes, though this is marginally less likely than if such a breakdown occurred in Gaza. Correspondingly, the political implications of maintaining the ceasefire remains a significant political priority for the United States, while the disarmament of Hezbollah, at least south of the Litani River, represents the priority of not only the U.S., but also the LAF, some elements of the Lebanese State, and technically UNSC Res. 1701 (though this has been mostly disregarded by the international community).³³ In addition to the disarmament efforts in Lebanon

³⁰ The White House. "The Trump Declaration for Enduring Peace and Prosperity." Presidential Actions, October 13, 2025.

³¹ Chatham House. "Hezbollah's Refusal to Disarm Makes Direct Negotiations Between Lebanon and Israel More Likely." November 2025.

³² Matthew Levitt, MMEPS 611, Pepperdine University Global Campus, November 2025.

³³ United Nations Security Council. *Resolution 1701 (2006)*. August 11, 2006. UN Digital Library.

itself, the United States has remained focused on confronting Hezbollah's international network, particularly by targeting entities and individuals facilitating financial transactions, drug trafficking, and weapons smuggling³⁴³⁵³⁶³⁷. These efforts draw significant CT resources and represent one of the highest American CT priorities in the Middle East, albeit with significantly less political attention than issues pertaining to Gaza.

Syria

The fall of the Assad regime in Syria in late 2024 paved the way for the tactical defeat of Hezbollah in southern Lebanon and the ongoing ceasefire agreement that followed.³⁸ The fall of a government loyal to both Iran and Russia in Syria, an area charged with historical, geopolitical, and economic significance, has created an opportunity for the U.S. to usher in a new era of peace, stability, and prosperity in the wider Middle East, with widespread coordination to counter destabilizing threats emanating from the remnants of the Islamic State and adversarial states.³⁹ The magnitude of this paradigm shift in the Middle East, and the fact that the state of affairs in Syria is still very much in flux, will continue to draw American attention and resources. Within Syria itself, the United States has several priorities including establishing a sustainable status quo between the central government and the areas under Kurdish control, continuing to pursue a path towards a security agreement between Syria and Israel, and continuing to counter resurgences of Daesh presence.

With regards to CT specifically, the global coalition against Daesh remains high on the list of priorities for the United States. Given the multitude of American interests on the ground in Syria, including those pertaining to active military bases and energy resource centers, in addition to the ongoing nation-(re)building process in Syria, it is unlikely that American policymakers would pursue a policy of regime change in another location with far fewer direct American interests.⁴⁰⁴¹ Unlike the ceasefires in Gaza and Lebanon, the Houthi movement is not particularly concerned with the state of affairs in Syria. However, the United States remains heavily invested in securing its own interests, as well as preventing a retrenchment of Iranian influence in Syria.

Horn of Africa

Across the Bab el Mandeb strait and notably in the AFRICOM AoR, the United States is currently involved in several CT efforts targeting the Islamic State and Al Shabab in Somalia.⁴² Somalia is effectively a failed state as it stands, with vast amounts of territory under the control of Daesh and Al Shabab. The central government in Mogadishu controls very limited amounts of territory and in no way exists as the primary sovereign power in Somalia. The self-proclaimed state of Somaliland, local clans, and the two aforementioned terrorist groups currently control significantly more territory than the Somali government, and the United States is heavily

³⁴Treasury Department (U.S.). 2025a. "Press Release SB0063." Accessed December 1, 2025.

³⁵ Treasury Department (U.S.). 2025b. "Press Release JY2648." Accessed December 1, 2025.

³⁶Treasury Department (U.S.). 2025c. "Press Release SB0308." Accessed December 1, 2025.

³⁷Treasury Department (U.S.). 2025d. "Press Release JY2065." Accessed December 1, 2025.

³⁸ CSIS. *Press Briefing: Assessing the Collapse of the Assad Regime*. Washington, DC: Center for Strategic and International Studies, 2025.

³⁹ U.S. Central Command. "CENTCOM Degrades ISIS in Syria." Press Release, 2025.

⁴⁰ Congressional Research Service. *Syria: Issues for the United States and Policy Options*. CRS Report RL33487. Washington, DC: Library of Congress, 2025.

⁴¹ The Washington Institute for Near East Policy. "Reducing U.S. Presence in Syria Too Quickly Could Help the Islamic State." Washington Institute, 2025.

⁴² U.S. Africa Command. "U.S. Forces Conduct Strike Targeting ISIS in Somalia." Press Release 36092, 2025.

involved in countering the various insurgencies and supporting the Somali government.⁴³ Should the United States decide to recognize Somaliland, additional resources may be required to support the fledgling state, though at the moment the priority on the horn of Africa is focused on CT and counterinsurgency operations, mostly in the form of intelligence sharing and airstrikes with Somali and African coalition forces.⁴⁴⁴⁵⁴⁶

Notable in the case of Yemen, however, are recent reports of arms trafficking across the Bab el Mandeb between Somalia and Houthi controlled territory in western Yemen. Starting in earnest following the fall of Sana'a in 2014, the IRGC has supplied various elements of materiel to the Houthis by utilizing several different smuggling routes. The porous Yemen/Oman border, which itself is adjacent to sparsely populated deserts, has become a problem that the United States has sporadically urged the government of Oman to address. The government of Oman has categorically rejected any claims that they are permitting, or rather enabling the transfer of illicit weapons across their borders, and any significant increase in border control would undoubtedly require substantial Omani investment in an issue that currently has little if any effect on their stability or interests⁴⁷⁴⁸. As such, the US, together with European and Middle Eastern partners, has focused on patrolling and intercepting weapons shipments on the high seas.

The Defense Intelligence Agency (DIA) has reported a multitude of interceptions, revealing the transfer of both complete weapons systems as well as critical components for local production, between Iran and Yemen. In a report published in April 2024, the DIA identified several notable interceptions by both the United States and partners including the UK, Canada, Australia, France, and Saudi Arabia. Seized materials included missile guidance components, rocket and missile fuel, and complete warheads. Additionally, fully constructed weapons systems including Anti Tank Guided Missiles (ATGMs), Rocket Propelled Grenades (RPGs), and Surface to Air Missiles (SAMs) have been confiscated. Several interdictions have occurred off the coast of Somalia, some of which have gained notoriety for various reasons. A Navy SEAL operation in January of 2024 resulted in the deaths of two American servicemen who were lost at sea, underscoring the risks and potential human costs of intercepting weapons shipments on small vessels and dhows⁴⁹.

At the moment, there is limited evidence linking Iranian weapons shipments to Yemen via the HoA, though persistent regional instability, particularly in Somalia and Sudan, have opened several doors for Iran to take advantage of. Iran can maintain a degree of plausible deniability when US or allied naval forces intercept weapons bound for Yemen, either by claiming the weapons originate elsewhere (when the weapons themselves are Russian or Chinese), or by deflecting blame to the ongoing conflicts in East Africa. However, the official

⁴³ U.S. Embassy in Somalia. "U.S. Remains Committed to Defeating al-Shabaab and Supporting a More Stable Somalia." 2025. <https://so.usembassy.gov/u-s-remains-committed-to-defeating-al-shabaab-and-supporting-a-more-stable-somalia/>.

⁴⁴ Reuters. "Somalia Offers U.S. Exclusive Control of Air Bases, Ports." *Reuters*, March 28, 2025. <https://www.reuters.com/world/africa/somalia-offers-us-exclusive-control-air-bases-ports-2025-03-28/>.

⁴⁵ Stratfor (RANE). "Assessing the Prospect of the U.S. Recognizing Somaliland's Independence." *Stratfor Worldview*, 2025. <https://worldview.stratfor.com/article/assessing-prospect-us-recognizing-somalilands-independence>.

⁴⁶ U.S. Africa Command. "U.S. Forces Conduct Strikes Targeting ISIS in Somalia." Press Release 36060, 2025. <https://www.afcom.mil/pressrelease/36060/us-forces-conduct-strikes-targeting-isis-somalia>.

⁴⁷ FDD. 2019. *Oman in the Middle: U.S. Policy and Regional Security*. Washington, DC: Foundation for Defense of Democracies. Accessed December 1, 2025. <https://www.fdd.org/wp-content/uploads/2019/05/fdd-report-oman-in-the-middle.pdf>

⁴⁸ Al Mukrashi, Fahad. 2018. "Oman denies weapons smuggling to Al Houthis through its borders." *Gulf News*, September 16, 2018. Accessed December 1, 2025. https://gulfnews.com/world/gulf/oman/oman-denies-weapons-smuggling-to-al-houthis-through-its-borders-1.1915982?utm_source=chatgpt.com (Gulf News)

⁴⁹ Wilson Center. 2025. "Houthi and U.S. Seizures." Accessed December 1, 2025. <https://www.wilsoncenter.org/article/houthis-us-seizures>

Iranian policy has been to simply deny all allegations, even stating that the Houthis have their own weapons and act purely in their own interest.⁵⁰ Somewhat ironically, Iranian Supreme Leader Ayatollah Khamenei stated a partial truth when he declared, following American allegations in early 2025, that the Houthi movement does not represent an Iranian proxy and acts in its own interest.⁵¹ As this paper has made clear previously, the Houthi movement does not act as a direct proxy of Iran or the Islamic Revolutionary Guards Corps (IRGC) in the same way that Hezbollah does. However, they have received substantial amounts of training, materiel, and financial support from Iran in addition to pledging allegiance to the Iran-led Palestinian cause since 2023.

Despite the limited evidence pointing to weapons transfers from the Horn of Africa to Yemen, the United States has intercepted several illicit shipments of weapons moving from Yemen towards Africa. A UNSC Panel of Experts report from 2022 documented the transit of dhows carrying weapons which were loaded at the Yemeni port of Dhubab. Interestingly, this port is under the control of the Yemeni government and not the Houthi movement. Additionally, much of weaponry analyzed by the panel of experts differed from typical Houthi arsenals, underscoring the uncertainty regarding the origins and facilitators of the shipment.⁵² Prior to the 2022 UNSC PoE, a study by the Global Initiative Against International Organized Crime tracing Type 56-1 assault rifles in Somalia found that rifles originating in Iran and trafficked to Yemen in the context of the Yemeni civil war, had found their way into the conflict in Somalia.⁵³ The existence of smuggling corridors between Yemen and Somalia have therefore been well documented and involve a multitude of actors and armed groups including but not limited to Iran, the Houthi movement, Al Shabaab, Daesh, and the Yemeni government. The proliferation of illicit weapons, regardless of whether or not the Houthis are involved, adds to the vital nature of securing the strategic waterways off of the Yemeni and Somali coasts.

Expensive Cooperation: The Costs of Allied Efforts to Secure Waterways

The Houthi attacks on civilian shipping had major economic implications for countries around the world. Most notably, of course, is Egypt which saw a reduction of roughly 50% in annual Suez-generated revenue.⁵⁴ The global effects were substantial as well: container spot rates increased by threefold, at the height of the Red Sea Crisis, and rates are still holding well

⁵⁰ Aljazeera. 2025. "Every Shot Fired: Are Yemen's Houthis a Proxy Force for Iran?" March 22, 2025. Accessed December 1, 2025. <https://www.aljazeera.com/news/2025/3/22/every-shot-fired-are-yemens-houthis-a-proxy-force-for-iran>

⁵¹ Sputnik Globe. 2024. "Iran Categorically Rejects Claims About Arms for Ansar Allah as America's Houthi Headache Worsens." March 19, 2024. Accessed December 1, 2025. <https://sputnikglobe.com/20240319/iran-categorically-rejects-claims-about-arms-for-ansar-allah-as-americas-houthi-headache-worsens-1117434216.html>

⁵² United Nations Security Council. 2022. *Report of the Panel of Experts on Somalia*. S/2022/754. Accessed December 1, 2025. <https://documents.un.org/doc/undoc/gen/n22/638/44/pdf/n2263844.pdf>

⁵³ Global Initiative Against Transnational Organized Crime. 2021. *An Iranian Fingerprint: Tracing Type-56-1 Assault Rifles in Somalia*. Accessed December 1, 2025. <https://globalinitiative.net/wp-content/uploads/2021/11/GITOC-An-Iranian-Fingerprint-Tracing-Type-56-1-assault-rifles-in-Somalia.pdf>

⁵⁴ Khaled, Fatma. 2025. "Egypt's Revenue from the Suez Canal Plunged Sharply in 2024." *AP News*, April 16, 2025. Accessed December 1, 2025. https://apnews.com/article/5a5fe98a74f64144f7aab9ceca9d87d3?utm_source=chatgpt.com

⁵⁵ International Monetary Fund. 2024. "Red Sea Attacks Disrupt Global Trade." March 7, 2024. Accessed December 1, 2025. https://www.imf.org/en/blogs/articles/2024/03/07/red-sea-attacks-disrupt-global-trade?utm_source=chatgpt.com

above pre-crisis levels.⁵⁶ Shipping times between Asia and Europe increased substantially as well as shipping companies opted to navigate around the Point of Good Hope rather than through the Suez Canal. Increased shipping times leads to increased fuel costs, which incurs costs on both companies and the climate. Decreased shipping efficiency can, albeit indirectly, impact international business profit margins, leading to increased costs and even inflation.

The United States did suffer economically from Houthi maritime terrorism, mostly in the form of increased freight and insurance costs, increased energy prices, and resulting inflation. However, American shipping relies significantly more on Panama Canal and Pacific transits than it does on the Suez Canal. The same cannot be said for Europe, which relies on the Suez Canal for roughly 30-40% of all shipping. The United States, with limited exposure to Suez transit, was affected indirectly, while Europe endured direct, detrimental economic impacts.⁵⁷⁵⁸⁵⁹

Though Europe experienced substantially more economic losses than the United States as a result of the Red Sea Crisis, the United States is more politically invested in ensuring security in the Middle East than Europe as a whole. Therefore, it is understandable that both the US and European nations initiated maritime operations to protect shipping and secure waterways, though for different reasons. Europe as a whole does not take public responsibility for protecting the international freedom of navigation in the same way that the U.S. Navy does, nor does it maintain the same level of relationship with Israel that the United States does. In fact, despite the virulent anti-Western themes emanating from the various parties that have confronted or attacked Israel since 2023, European popular sentiment towards Israel has deteriorated significantly, ostensibly due to the impact of IDF operations on the civilian population of Gaza. Why Europe in general has gravitated politically towards anti-Western actors in recent years, especially those who have caused economic damage to the continent both directly and indirectly, is not the concern of this paper. It is critical to understand for the sake of policy recommendations, however, the degree to which the Houthi movement and the wider Axis of Resistance harmed European economies as a result of the Red Sea crisis.

Looking Ahead: Policy Recommendations

As discussed above, the Red Sea Crisis had a major impact on global shipping costs which directly impacted European nations and indirectly, and less significantly, harmed American economic interests. It has been established, therefore, that both the U.S. and EU had motivations, whether political, economic, or security related, to ensure safe passage for civilian shipping through the Suez Canal and degrade the ability of the Houthi movement to interrupt the

⁵⁶ Xeneta. 2025. "What Is Behind the Sudden and Dramatic Increases in Ocean Freight Container Shipping Rates?" Accessed December 1, 2025.

<https://www.xeneta.com/blog/what-is-behind-the-sudden-and-dramatic-increases-in-ocean-freight-container-shipping-rates>

⁵⁷ United Nations Conference on Trade and Development (UNCTAD). 2024. *Review of Maritime Transport 2024: Navigating Maritime Chokepoints*. UNCTAD/RMT/2024. Geneva: UNCTAD. Accessed December 1, 2025.

https://unctad.org/publication/review-maritime-transport-2024?utm_source=chatgpt.com

⁵⁸ Atlantic Council. 2025. "A Lifeline Under Threat: Why the Suez Canal's Security Matters for the World." Accessed December 1, 2025.

<https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/a-lifeline-under-threat-why-the-suez-canals-security-matters-for-the-world/>

⁵⁹ United States Department of Transportation, Bureau of Transportation Statistics. 2025. *Port Performance Freight Statistics: 2025 Annual Report*. Washington, DC: U.S. Department of Transportation, 2025. Accessed December 1, 2025.

https://www.bts.gov/sites/bts.dot.gov/files/2025-03/BTS_Port-Performance-2025_Annual-Report_for%20web_20250224-1232.pdf

freedom of navigation in the region. As mentioned in the introduction, both the U.S. and EU initiated operations to do exactly this, though with slightly different overall missions and drastically different levels of investment. The dollar amounts of the various operations, as well as the number of ships deployed to the Red Sea and Gulf of Aden tasked with defending against Houthi attacks, differed substantially between the U.S. and Europe.

Operation Prosperity Guardian, the first major regional naval operation led by the US, cost mission contributors some ~10\$ billion between 2023 and 2025. Massive amounts of air defense munitions were expended defending both coalition naval assets as well as the civilian ships under their escort. The vast majority of these costs were incurred by the United States, and the coalition lacked several key regional partners as mentioned previously. Furthermore, Operation Rough Rider, also U.S.-led with limited UK contributions, cost a further ~10\$ billion, with the US again responsible for most of these costs. On the other hand, Operation Aspides was initiated with a budget of 8€ million for one year. Though the mandate was extended to February 2026, expected costs remain under 20€ million⁶⁰. American investment in protecting the Red Sea shipping lanes, crucial for international shipping but importantly more relevant for Europe-Asia trade, is substantially higher than that of Europe. Though the U.S. costs include strike missions and the deployment of both the USS Carl Vinson and USS Harry S. Truman, Operation Aspides only ever deployed 1-3 ships to the Red Sea region at any given moment. In contrast, Operation Prosperity Guardian typically deployed 4-8 vessels to the region during the height of the crisis.⁶¹⁶²

The clear imbalance can be explained in simplistic terms by both the sizes and resources of European navies compared to the US, as well as the difference in assumed responsibility for protecting the freedom of navigation in international waters, in which the United States has traditionally taken a more active role in recent decades. However, given the significantly larger economic impact of reduced Suez transits on European import economies compared to the United States, it is clear that Europe should have taken, and should actively take moving forward, a more active role in protecting its own economic interests in the form of increasing the presence of European naval assets in strategic waterways during times of crisis. If European navies do not possess the capability of securing waterways critical to their own economies and trade routes, substantial investment must be made in terms of maritime capabilities. Europe is vulnerable to the closure of strategic waterways and must maintain the ability to collectively secure them without the assistance of the United States. As such, the United States should emphasize the importance of European naval capabilities, and work with European partners to encourage new shipbuilding contracts in the context of increased defense spending in Europe⁶⁴.

⁶⁰ Maritime Executive. 2025. "EU Extends Aspides Freedom of Navigation Mission in the Red Sea to 2026." Accessed December 1, 2025.

<https://maritime-executive.com/index.php/article/eu-extends-aspidess-freedom-of-navigation-mission-in-the-red-sea-to-2026>

⁶¹ Business Insider. 2025. "Europe Doesn't Have Enough Warships to Protect Red Sea Vessels, Commander Says." July 2025. Accessed December 1, 2025.

<https://www.businessinsider.com/europe-doesnt-have-enough-warships-protect-red-sea-vessels-commander-2025-7>

⁶² U.S. Department of Defense. 2025. "U.S., Partners Committed to Defensive Operations in Red Sea." November ? 2025. Accessed December 1, 2025.

https://www.defense.gov/News/News-Stories/Article/Article/3631623/us-partners-committed-to-defensive-operations-in-red-sea/?utm_source=chatgpt.com

⁶³ CNBC. 2024. "Maersk Red Sea Pause Shows Operation Prosperity Guardian Limits." January 2, 2024. Accessed December 1, 2025. <https://www.cnbc.com/2024/01/02/maersk-red-sea-pause-shows-operation-prosperity-guardian-limits.html>

⁶⁴ SIPRI. 2025. "Unprecedented Rise in Global Military Expenditure; European and Middle East Spending Surges." Accessed December 1, 2025. <https://www.sipri.org/media/press-release/2025/unprecedented-rise-global-military-expenditure-european-and-middle-east-spending-surges>

In addition to encouraging increased European engagement in protecting Red Sea shipping, the United States should similarly ensure a consistent, moderately sized coalition force operation in the Red Sea/Gulf of Aden/HoA region for several CT purposes. First and foremost, civilian shipping associated with Prosperity Guardian coalition members must be given the highest priority, which should both increase the confidence of shipping companies to transit the Suez Canal, as well as encouraging regional partners to join the coalition for the mutual and collective benefit of increased available naval resources. The United States should similarly plan multilateral naval exercises in the region to encourage further engagement, offering training and the opportunity for operational experience for allied navies. A substantial deployment of American and allied naval assets in the region will ideally lead to a return to normalcy for shipping traffic through the Suez Canal, benefiting regional and European economies, as well as undermining the ability of the Houthis to continue indirectly harming Western economies. The United States should emphasize a goal of returning Suez transits to their normal pre-10/7 levels, and encourage Egyptian support on that basis. Though it is unlikely that Egypt will deploy ships ostensibly to counter Houthi threats, ensuring Egypt through traditional diplomatic channels that the United States is concerned about the economic impacts on a regional partner will benefit bilateral relations and American priorities in Gaza by proxy.

Additionally, a larger allied naval deployment in the region will hinder smuggling attempts both between Iran and Yemen and between Yemen and the HoA, simultaneously benefiting American priorities in both Yemen and Somalia. Though the United States and partners have had some success in intercepting weapons shipments on these avenues, the Houthis and Iran have continued to exercise a degree of freedom in conducting illicit weapons trade across maritime routes.

A significant American-led naval exercise aimed at protecting shipping lanes, preferably with the participation of regional partners such as Egypt, Saudi Arabia, and the UAE, will deter smuggling attempts in the short term, and project regional alignment with U.S. and European priorities of securing international waterways. In the longer term, a continued coalition and European naval presence protecting shipping lanes must prioritize a return to pre-10/7 Suez traffic, while providing partner navies with interoperability training opportunities, political reasoning for European countries to invest in building naval capacity, and crucial operational experience for all countries involved in the face of threats in other strategic waterways including the Baltic Sea and Straits of Taiwan.

Finally, it would be unwise for the United States to pursue a policy of regime change in Yemen given the current fractured political status quo, the misalignment of key partners Saudi Arabia and the UAE, and the critical nature of preserving the precarious peace in Gaza. Despite calls to pivot to INDOPACOM and ongoing uncertainty in Venezuela, a strong American presence both on land and at sea in the Middle East is key to securing American interests, protecting allies, and maintaining readiness in the event of adversarial aggression.⁶⁵⁶⁶ In the interest of regional peace, which very much aligns with current executive branch priorities, the US should focus on regional defense integration and cooperation by emphasizing collective security by voluntary engagement. Securing maritime routes for civilian shipping is key for American partners in the Middle East, and the U.S. can link maritime cooperation with ongoing efforts in air defense and aviation, as well as mutual investment in the American defense

⁶⁵Alterman, Jon B. "Pivoting to Asia Doesn't Get You Out of the Middle East." *CSIS Commentary*, October 19, 2020. <https://www.csis.org/analysis/pivoting-asia-doesnt-get-you-out-middle-east>.

⁶⁶Campos, Rodrigo. "Venezuela Bonds Surge as US Pressure Intensifies on Maduro." *Reuters*, November 6, 2025. <https://www.reuters.com/world/americas/venezuela-bonds-surge-us-pressure-intensifies-maduro-2025-11-06/>.

industry, the construction of data centers and other AI-related infrastructure, and cooperation in existing civilian nuclear programs.

Though the current moment is not ideal to push for regime change in Yemen, moments can change fast. The United States should therefore work to build relationships with key Yemeni political leaders opposed to Houthi rule, and seek alignment between political factions and their state backers (Saudi Arabia, UAE). These efforts should be conducted out of the public eye, and be supplemented by increased intelligence gathering operations within Houthi-controlled territory. The U.S. can potentially coordinate with Israel in this case as well by offering intelligence assistance in return for Israeli guarantees to coordinate with the U.S. on any future acts deemed as potentially destabilizing. The U.S. must prepare for the possibility of a Houthi collapse, or a future opportunity to encourage it, should such an opportunity arise. The U.S. should not, however, seek to create such an opportunity in the short term and should instead focus on securing shipping lanes, combatting smuggling, and ensuring the success of the Gaza ceasefire.

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