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MARITIME SECURITY AND GEOSTRATEGY IN THE MIDDLE EAST

THE RED SEA CONFRONTATION AND THE LIMITS OF RESPONSE

A new frontline in the Red Sea

The Red Sea was once treated as a commercial highway. Today, it has become a pressure point in global politics. Since late 2023, Ansar Allah, widely known as the Houthis, has targeted commercial vessels transiting the Bab el Mandeb Strait. The movement claims solidarity with Gaza. The consequences, however, extend far beyond the immediate theatre of conflict.

Roughly 12 per cent of global trade passes through this narrow corridor linking Europe and Asia. When vessels reroute around the Cape of Good Hope, transport costs increase, delivery times expand, and supply chains tighten. What appears at first glance to be a regional escalation in Yemen rapidly becomes a global economic challenge.

In my view, the Red Sea crisis exposes something deeper than a maritime security problem. It reveals how vulnerable the global economy has become to disruption by non-state actors operating with relatively modest capabilities. The responses of the United States and Israel demonstrate two distinct strategic logics. Both are rational. Neither resolves the underlying dilemma.

Deterrence without resolution

When commercial shipping is attacked, governments instinctively turn to deterrence. Missiles are intercepted. Launch sites are struck. Naval coalitions are formed. The objective is straightforward: restore order and demonstrate resolve.

The difficulty lies elsewhere. Movements such as Ansar Allah are embedded in fragile political environments. They are not conventional armies with fixed front lines or clearly defined command structures. Their resilience stems from internal fragmentation in Yemen, regional alliances, and narratives of resistance that resonate beyond national borders.

Military strikes can degrade capabilities. They rarely remove the political and social conditions that sustain such actors. The Red Sea confrontation is therefore not simply about maritime patrols. It raises a broader question: can tools designed for interstate conflict effectively manage asymmetric actors operating from fractured states?

The American approach: managing the threat

Washington has framed the crisis primarily as a threat to freedom of navigation. Operation Prosperity Guardian, a coalition effort to protect commercial shipping, reflects this framing. Warships intercept drones and missiles, while limited airstrikes, often coordinated with the United Kingdom, target radar systems and launch sites inside Yemen.

The message is carefully constructed. International waterways cannot be closed by a non-state actor. By involving European and regional partners, the United States presents the confrontation as a defence of maritime order rather than a bilateral clash.

Yet the approach remains deliberately limited. There is no attempt to re-enter Yemen's civil war or to eliminate the movement entirely. After two decades of costly interventions in the Middle East, Washington appears focused on containing disruption rather than reshaping the political landscape. The strategy protects shipping lanes. It does not resolve Yemen's fragmentation.

The Israeli approach: enforcing deterrence

Israel interprets the attacks through a different lens. For Tel-Aviv, missile and drone launches from Yemen are not merely a maritime issue. They form

part of a broader confrontation linked to Gaza and to regional alignment against Israel.

In response, Israel has conducted airstrikes on infrastructure in Houthi-controlled territory, including facilities near Hudaydah. The objective is direct and visible: impose tangible costs and reinforce deterrence. The message is that geographical distance offers no immunity. Actors who align militarily against Israel will face retaliation.

This approach follows a long-established doctrine of decisive response. However, it carries risks. Strikes on Yemeni territory can intensify regional polarisation and strengthen the perception that the movement is confronting Israel on behalf of a wider cause. In such circumstances, deterrence may unintentionally reinforce the very narratives it seeks to undermine.

***Two* strategies, one dilemma**

The United States prioritises the stability of global trade. Israel prioritises the credibility of deterrence. Both strategies rely on calibrated military force, and both aim to prevent uncontrolled escalation. Yet neither addresses the political roots of the movement's endurance.

Over years of war, Ansar Allah has survived regional intervention, internal fragmentation, and international isolation. Its position is reinforced by broader regional rivalries, particularly between Iran and its adversaries. Naval patrols can intercept projectiles. Airstrikes can destroy infrastructure. They cannot reconstruct governance or reduce geopolitical competition.

As long as Yemen remains politically fractured, the Red Sea will remain vulnerable. Maritime insecurity risks becoming cyclical rather than exceptional.

A testing ground for modern geostrategy

The Red Sea confrontation reflects a broader shift in contemporary conflict. Non-state actors equipped with relatively inexpensive drones and missiles can disrupt strategic trade routes that underpin global prosperity. Highly integrated economies depend on narrow maritime corridors that are increasingly exposed to asymmetric tactics.

For Europe and other trading powers, this should serve as a warning. Securing sea lanes requires more than naval deployments. It demands sustained engagement with the political conflicts that endanger them.

In my assessment, the core question is no longer whether deterrence can suppress individual attacks. It is whether deterrence alone can generate lasting stability. The Red Sea crisis suggests that without political stabilisation in Yemen and broader regional de-escalation, disruption will recur in new forms. The frontline may shift. The strategic dilemma will endure.