Scenari

Report for decision makers

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SAUDI ARABIA AND YEMEN IN THE RED SEA: MARITIME SECURITY AND NON-STATE ACTORS

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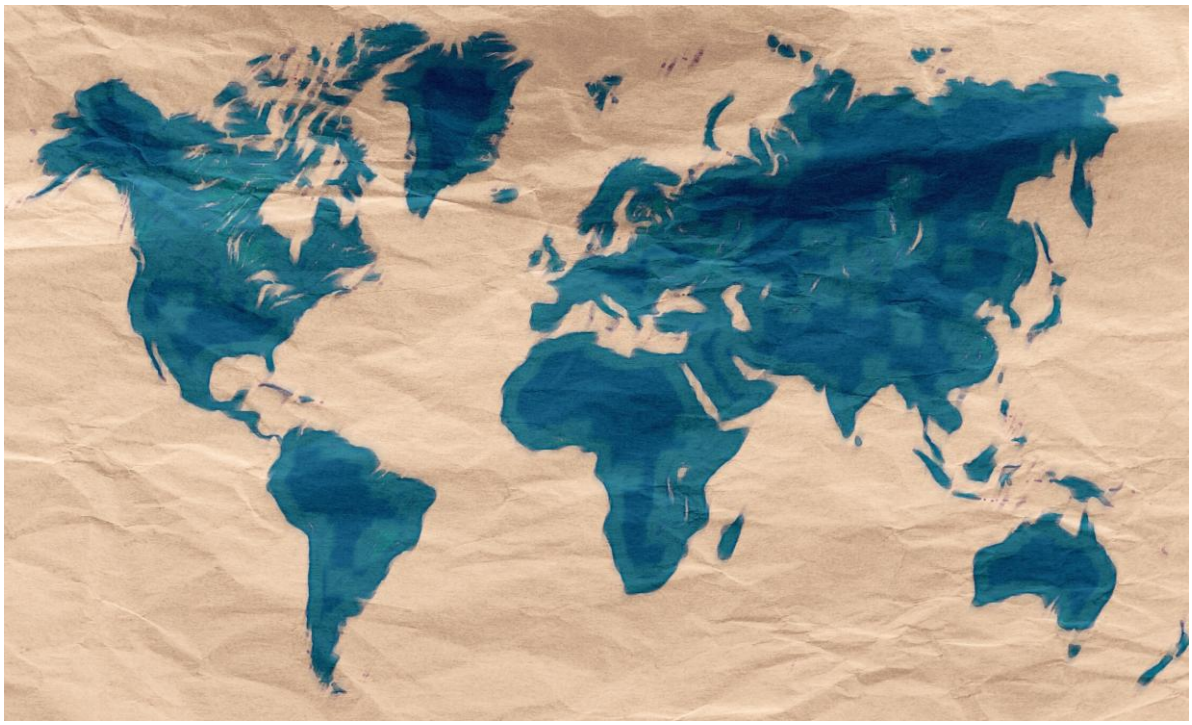
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The center deals with research, dissemination and training on international issues, with a particular focus on geopolitics and international law.

It provides training courses for schools, students, professionals and companies; it carries out geopolitical analyses and reports; it organizes institutional events and conferences and informal meetings to approach the subjects covered.

At the time of this publication, more than 50 young professionals are part of AMIStaDeS, including board of directors and analysts. All animated by the same thirst for knowledge and sharing.



Scenari

Scenari is a line of reporting aimed at decision-makers of different kinds, such as companies, institutions, NGOs and other bodies operating nationally and internationally. The analysis of the present, combined with the awareness and knowledge of the past and the evolution of societies, relationships and phenomena, allows us to identify the most probable hypotheses of the context.

Scenari is a compass to guide decision-makers in the actions they decide to take. Scenari provides perspectives and visions using the multiple nuances borrowed from different fields such as social sciences, law and geopolitics. Scenari is a spectrum of possibilities from which decision-makers will be able to choose.



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Abstract

The Red Sea constitutes a complex, dynamic, and multi-layered geopolitical system, characterized by interactions among both state and non-state actors operating at the local, regional, and international levels. These interactions are shaped not only by specific economic interests, but also by distinct historical, geopolitical, and socio-cultural factors, which contribute to the region's multifaceted and multi-level identities. Building on this situational analysis, the study further examines the economic and maritime security dimensions that together define a crucial chokepoint for commercial and infrastructural connectivity between East Asia, the Indian Ocean, Western Asia, the Mediterranean, and Europe.

Methodological approach

by F. Adele Casale

This semi-annual publication offers an analysis of the Red Sea geopolitical area with a focus on Saudi Arabia and Yemen, complementing the previous issue Navigating the Red Sea Crisis: Migrants, Infrastructure, and Crime, which focused instead on the coastal countries of the Horn of Africa.

Yemen and Saudi Arabia, along with other regional and extra-regional actors, are moving in a geopolitical arena crucial to global trade and network infrastructure. ecurity in this area is a sine qua non for freedom of navigation, infrastructure development, and resilience, especially in light of the joint Israeli-U.S. attacks against Iran, which began on February 28, 2026.

Two countries, two complex, dynamic systems involving various state and non-state actors, whose specific historical and sociopolitical identities are intertwined with national, regional, and international economic needs and interests.

To inform the decision maker about the numerous interconnected aspects of these complex systems, several thematic Observatories have been involved, whose contributions are integrated into the Context Analysis, notably in the paragraphs Saudi Arabia in the Red Sea andYemen in the Red Sea entrusted to the MENA unit; in-depth analyses regarding the Houthi actor in Fluid Borders and Hybrid Actors, and a section dedicated to security-related aspects concerning freedom of navigation, the scope of the Yemeni conflict, and the network infrastructure of the region, in Regional Security: Freedom of Navigation, Conflicts and Infrastructures. The work was completed under the supervision of the Sea Observatory.

Collaboration among experts from various fields made it possible to address various aspects of this complex and specific reality, providing decision-makers with a framework in which both opportunities and risks can be identified.

Through an analysis of how structural determinants impact projections, trends were identified that form the basis upon which the final scenarios were constructed. These scenarios are developed using an "if… then" framework and are calibrated for low, medium, and high probability, with specific projections for the short, medium, and long term.

The analysis, drafting, and revision were completed on May 26, 2026. The most recent comprehensive review of the sources took place on June 30, 2026: a brief update appendix is available before the table presenting the developed scenarios.

Since this study deals with highly current events that are still unfolding, some of the data presented comes from news outlets, with particular attention paid to diversifying the sources.



Image 1: Location of the covered countries in the Middle East, and enlargement of the area.
Map by F. Adele Casale.

Context Analysis

by F. Adele Casale, Andrea Speziale

The area is of particular importance due to its role as the shortest maritime route connecting the Indian Ocean and the Mediterranean, with an estimated annual trade volume of one trillion dollars, accounting for approximately 12%–15% of global trade.

Any disruption to transit through the Red Sea has domino effects on global supply chains, energy prices, insurance premiums, and food security.

This body of water is, in fact, the most direct route for trade and infrastructure links between East Asia, the Indian Ocean, West Asia, the Mediterranean and Europe. Crude oil and liquefied natural gas from the Persian Gulf bound for European markets, containerized cargo from Asia to Europe, and grain from the Black Sea to the Horn of Africa all pass through this route.

The trade routes connecting the major ports of East Asia and the countries bordering the Indian Ocean must necessarily pass through the Red Sea, the most direct and fastest route to reach the Mediterranean basin and therefore to Europe via the Suez Canal.

The alternative route involves crossing the entire Indian Ocean, rounding the Cape of Good Hope off the coast of South Africa, entering the Atlantic Ocean along the western coast of Africa, and then entering the Mediterranean via the Strait of Gibraltar, or continuing further north to the major ports of Northern Europe. This second route extends voyage times by many days, if not weeks, resulting in increased shipping costs and, above all, significant delays in global supply chains.

There are two additional potential routes for the transit of goods between Asia and Europe, but both present significant challenges, which do not make them competitive with the route around Cape of Good Hope, much less with the Red Sea crossing.

The first is a land route consisting of railways,

highways, oil and gas pipelines that wind their way across (almost) the entire length of the Eurasian continent. It has the advantage of significantly reducing transit times, but the major disadvantage of being unable to match the enormous volumes of cargo transported by sea. Furthermore, much of this infrastructure was built by China, which controls them, as part of the Belt and Road Initiative (BRI) and cross regions often subject to significant geopolitical tensions (Central Asia, the Caucasus, the Middle East).

The second runs far to the north. It is a maritime route that runs from Asia along the northernmost regions of Russia, beyond the Arctic Circle, and thus allows access to European ports via the North Sea and the Baltic Sea. Although the Arctic route is much shorter than the Red Sea route, there is the considerable drawback of not being unnavigable for most of the year due to the ice covering that stretch of sea, making navigation possible only for a limited period of time. In fact, it is not currently an alternative practiced by large-scale international merchant traffic, even though global warming could (in the not too distant future) make the Arctic route attractive and redraw the map of global merchant shipping routes.

Furthermore, the strategic importance of the area with regard to the communications sector should not be underestimated: the cables laid on the seabed ensure internet connectivity not only for the countries in the region of interest, but also connect the states of East Asia, the Indian Ocean, the Middle East, East Africa, and Europe, thereby making the Red Sea one of the main hubs of global internet traffic.

1. Saudi Arabia in the Red Sea

by Martina Seppi, F. Adele Casale, in collaboration with Lisa Borlotti, Sante Grande

Saudi Arabia occupies approximately four-fifths of the Arabian Peninsula and borders Jordan, Iraq, and Kuwait to the north. To the east, it faces the disputed Persian Gulf (Arabian Gulf) and borders Qatar and the United Arab Emirates. To the southeast, it borders Oman and to the south, Yemen.[1]

Characterized by the alliance between the central power and the austere and conservative Wahhabi Islamic movement since the 18th century, Saudi Arabia has been ruled by the House of Saud, which during the thirty-year period from 1902 to 1932 united under its authority six independent emirates, which were then consolidated into a kingdom by King Abdulaziz al Saud, and strengthened in the following decades thanks to policies aimed at the legitimacy of the crown by his successors.

Today the charismatic Crown PrinceMohammad bin Salman Al Saud, appointed in 2017, is the de facto ruler, acting on behalf of his elderly father, King Salman.

The contemporary Saudi political system is based on the national uniqueness proclaimed by the *Basic Law*, a document consolidated under King Fahd bin Abdulaziz in 1992 that provides guidelines for the functioning of government and defines the rights and duties of citizens. The King holds legislative, executive, and judicial powers, as well as international representation and command of the country's Armed Forces.

Saudi Arabia, with its capital Riyadh, is a mostly arid and sparsely populated kingdom in the Middle East: as of 2024, 35,300,280 million, approximately 16 inhabitants/km2, with an annual growth rate of 4.6 points, and an urbanization rate of 92% and a rural population of 8% (including seasonal nomadic populations). The population, predominantly Sunni Muslim Arabs (85%-90%, with a Shia minority of between 10-12%) is composed of various ethno-religious groups, and has a significant non-Arab component, mainly the result of economic migration. It is a member of the GCC (Gulf Cooperation Council), the Arab League, the Organization of Islamic Cooperation (OIC), the United Nations (UN), and OPEC (Organization of the Petroleum Exporting Countries). In the 20th century, it was one of the world's largest oil producers.

Specifically, starting from the 60s and 70s, Saudi Arabia's revenues have been closely linked to the

[1] The long-standing controversies The land and maritime border disputes between Yemen and Saudi Arabia were formally resolved with the Treaty of Jeddah in 2000. However, tensions persist over border security and the Yemeni conflict. The border dispute between Saudi Arabia and Qatar has been formally resolved since 2001 and does not currently constitute an open territorial dispute.
The border between Saudi Arabia and the United Arab Emirates is formally regulated, but remains disputed primarily by the Emirates. A Neutral Zone existed between Saudi Arabia and Kuwait, established in 1922 until 1969, when it was divided in favor of establishing a political border. The area's resources continue to be jointly exploited. A Neutral Zone also existed with Iraq. This was formally divided in 1981, and the border is now internationally recognized.despite having long been influenced by regional political tensions.

oil market thanks to the rich oil deposits in its eastern regions.

While on the one hand these economic resources have fueled massive and rapid investments in infrastructure, on the other hand, they have primarily enriched the elites, whose socioeconomic and political position is underpinned by religious conservatism and deeply rooted ethnic factors, resulting in an extremely hierarchical system.

Furthermore, the dependence on oil makes the kingdom potentially vulnerable to economic fluctuations, possible political crises and fluctuations in the price of crude oil, the percentage of revenue derived from oil out of total GDP exceeded 87%, in the late 1970s.

Pressure factors such as **regional crises, border tensions, especially with Yemen, population growth and uncertainty regarding import prices of goods and services**, make it difficult for the country to contain public spending.

Beginning the mid-20th century, the monarchy has focused on diversifying the economy on the one hand and developing the private sector on the other. In 2016, the Saudi Council for Economic and Development Affairs (CEDA), chaired by current Crown Prince and Deputy Minister Mohammed bin Salman al-Saud launches growth and innovation plan Saudi Vision2030 (hereinafter Vision 2030) monitored by the same promulgating body, and financed by the Public investment fund (PIF).

This is a plan for economic and political reforms with the following objectives.

- strengthening the private sector;
- reducing dependence on oil
- diversifying of the country's economy
- strengthening citizen participation and political transparency

The planned actions, designed mainly to boost domestic activities, aim to revitalize the country's image[2] on the international stage, with the goal of making it the heart of the Arab and Islamic world, a **global engine for investment and a hub connecting the three continents, Europe, Asia and Africa**, while simultaneously improving the quality of life of its inhabitants.

Not to be overlooked is the goal of securing a leading Sunni role in opposition to **Shi'ism and serving as a** pillar of **regional stability** between Israel, Lebanon, Syria, and Iran, with the support of the International Community (the Abraham Accords developed during 2020 fit into this context), while attracting **foreign capital**.

Heir to a rich religious, ethnic, and commercial history, the Hejaz region stretches along the shores of the Red Sea. It has been the cradle of Islam and home to the two main holy cities of the Islamic world: Mecca and Medina.

[2] The country's image has deteriorated both internationally, with the ongoing war in Yemen since 2015, its rapprochement with the US and the Trump administration in 2017, the Khashoggi murder, and the political detentions of activists; and regionally, following its rapprochement with Israel.

The region's economy, once dependent on gold mining, is now based on religious tourism (one of the five pillars of Islam calls for a pilgrimage to Mecca to be undertaken at least at least once in a lifetime, the *Hajj*), on light industry (particularly in Jeddah), trade, limited agricultural production of dates and grains, and the wealth generated by oil fields in the eastern part of the country.

In this context, the Red Sea region is extremely important for Saudi Arabia whose coast runs along this sea for approximately 1800 km. **Maintaining security in the area is not just a matter of freedom of navigation, but a fundamental prerequisite for national economic transformation.** In this sense, the series of ambitious programs and projects[3] aims to innovate the country, including the development of maritime infrastructure in the Red Sea.

Saudi Arabia's National Transport and Logistics Strategy (NTLS), launched in June 2021, under the auspices of the Ministry of Transport and Logistics Services (MOTLS), defines the framework for transforming the Kingdom into a global logistics hub connecting Europe, Asia, and Africa. The strategy leverages Saudi Arabia's geographic location at the crossroads of three continents, its extensive coastline on both the Red Sea and the Arabian Gulf, and the amount of capital available for infrastructure investments at creating a transportation network of international significance.

Furthermore, in March 2025,the Saudi Port Authority, Mawani, announced the expansion and the provision of new services for the port of Jeddah, connecting it to its eight regional and international ports as well as the development of King Abdullah Port.

This infrastructural expansion, which allows access to increasingly larger ships and containers, is accompanied by an increase in the operational efficiency of customs procedures, processes that were once cumbersome and involved long waits, but have been reduced to a few hours over the last four years.The development of new logistics centers and seaports is underpinned by a strong commitment to **digitizing systems**, which would position the country a technological innovator and a leader in the region.

Saudi Arabia currently counts eight major commercial ports[4] in the Red Sea.

- Yanbu. Opened in 1965 on the second most important entry artery for pilgrims. Located roughly halfway between the Islamic Port of Jeddah and the industrial port of King Fahad to the south and the port of Dhuba to the north, the commercial port of Yanbu is strategically positioned to serve the local economies of the Madinah and Qassim regions, two

[3] These projects include: financial sector development, the public financing fund, human capital development (fighting unemployment), the country's housing program, the privatization program, the transformation of the health sector, the national transformation program, and the industrial and logistics development plan.

[4] For the purposes of this work, only the major commercial ports are taken into consideration.

of the Kingdom's most promising commercial hubs.

- King Abdullah. The port is located about 120 km north of Jeddah. It is strategically located to serve the east-west transshipment of domestic cargo and volumes. The King Abdullah Economic City (KAEC) megaproject, planned for 2029, is adjacent to the seaport. It consists of light and heavy industrial zones, as well as healthcare, recreational, educational, and residential facilities.
- Duba in the north. As the port closest to the Suez Canal, it is also the closest to emerging markets and Mediterranean ports. Opened in 1994, it connects the Kingdom's northern and western regions to the global economy, supporting the Tabuk region's economy and facilitating travel to and from the Kingdom.
- Jazan in the south, towards Yemen. Third largest port of Saudi Arabia by design capacity, it is the Kingdom's main gateway for livestock imports from the African continent. Opened in 1976, the port is approximately 266 nautical miles (about 492 km) from the Bab Al Mandab Strait. The port has undergone three separate expansion projects.
- The port of Neom. A strategic gateway to the Red Sea. At the crossroads of East-West trade, it connects Asia, Africa, and Europe, while also promoting regional integration through multimodal corridors between Egypt, Saudi Arabia, and Iraq. The port, already active in the cargo handling sector, handles containers, bulk, Ro-Pax and warehousing, thereby helping to strengthen Saudi Arabia's role in supporting global supply chains.
- Rabigh. Operated by the Rabigh Refining & Petrochemical Company, it plays a crucial role in the import of crude oil, the export of petroleum products, and the shipment of sulfur.
- Qadhimah. Located in northwestern Saudi Arabia, it supports trade and logistics. Designed to facilitate a wide range of freight operations, it plays a key role in import and export activities for local and regional markets. Its strategic location along the Red Sea improves connectivity and provides essential access to shipping lanes, making it an integral part of the Kingdom's maritime infrastructure.
- Jeddah. Together with King Abdulaziz International Airport (KAIA), the Islamic Commercial and Civil Port of Jeddah primarily serves Mecca. A UNESCO World Heritage Site, it is a central railway and telecommunications hub, home to several logistics and storage facilities, and a water desalination plant.

The strategic rationale links logistics capacity to economic diversification with the objectives of reducing the costs of commercial activities, attracting investment in the manufacturing sector, promoting export-oriented industries, supporting tourism, and creating direct employment. The NTLS targets a logistics sector to contribute 10% of GDP by 2030, in conjunction with the infrastructure development projects outlined in Vision 2030. As of October 2025, the Saudi Port Logistics Market Report states that the growth of the Saudi maritime and port sector will rise from 1.71 BUSD to 2.61 BUSD by 2033.

Regarding the current status of the results achieved against the Vision 2030 targets relevant to this study, as of 2024, the country's GDP from non-oil activities reached 1.3%, and the overall growth rate of these activities reached 4.3%. The inflation rate stands at 1.7%, making Saudi Arabia one of the G20 countries with the highest monetary stability. Regarding the issue of the monarchy's dependence on oil, the current share of non-oil exports (goods, services, and re-exports) in GDP has reached 25%, up from a baseline of 18% in 2016, however a goal far from the target set for 50% by 2030.

As for the private sector, its contribution to GDP has reached 47% and the monarchy intends to reach 65% by 2030.

More broadly, the 2024 annual report highlights that Saudi Arabia has achieved 85% of the Vision 2030 goals. However, the official website states that some programmes have slowed down, or even stopped, as in the case of the port of Neom, due to various internal and external factors, and that corrective measures have been promptly taken, without specifying which programs have been affected by these factors.

Regional stability is a sine qua non. The program aimed at developing the country's logistics is threatened by the military activities of the Houthis, as will be discussed in the following chapter.

IIn Yemen, Saudi Arabia supports the Presidential Leadership Council (PLC), a coalition formed in 2022 to counter Houthi influence, which currently holds control over most of the country.

The southern regions are controlled by the Southern Transitional Council (STC), which is supported by the United Arab Emirates (UAE). The clashes in January 2026 between the PLC and STC led the Saudi Foreign Minister to convene a meeting in Riyadh with the Southern Transitional Council.

Although Saudi Arabia is investing to bring stability to the most destabilized regions in the south along the border with Yemen, primarily by filling a vacuum left by the United Arab Emirates, these regions remain vulnerable and have significantly slowed down the economic development outlined in Vision 2030, particularly that related to the private tourism sector. Inbound foreign direct investment (FDI) figures peaked in 2021 ($28 billion), before declining slightly; however, in 2024, inflows

remained above $15 billion, a significant value compared to the global average.

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2. Yemen in the Red Sea

by Isabella De Sinno, Marisa Cocchiaro

Among the key players moving in the region, together with Saudi Arabia, there is Yemen, which represents one of the most critical geographic hubs of contemporary global geopolitics, located at the intersection of three strategic axes: the Red Sea, the Gulf of Aden and the Indian Ocean.

From a geographical standpoint, its location on the southwestern shore of the Arabian Peninsula places it as the natural guardian of the Strait of Bab al-Mandab, a passage just 30 kilometers wide that separates the Red Sea from the Gulf of Aden, a bottleneck through which passes around 12% of global maritime trade and even higher percentages of energy flows to Europe and Asia. Historically, control of this territory has meant power over one of the most important trade routes since the Silk Route, as it does in the modern era.

Today, Yemen's ports are the northern one of Hodeidah and the southern port of Aden, which face contrasting situations. Hodeidah, controlled by the Houthis since 2014, is currently in serious trouble: its operational capacity has been reduced by 70% due to repeated airstrikes and rising insurance costs, with particularly severe infrastructure damage to warehouses and logistics corridors caused by Israeli raids that have also struck oil storage facilities, while global shipping companies are increasingly reluctant to dock at the port due to rising insurance risks and its declining reputation.

Furthermore, according to United Nations reports four of the five tugboats needed to escort large cargo ships have sunk, while the fifth has been damaged, reducing the port's capacity to about a quarter of its original level. In contrast, the port of Aden, controlled by the internationally recognized government, remains operational and serves as a strategic alternative for maritime trade in the region, playing a crucial role in Yemeni trade while facing security challenges from Houthi threats.

Although central to the architecture of global trade, the country does not represent a single sovereign actor, but rather an arena of multipolar competition, where state and non-state actors, both regional and international, compete for influence and access to resources, especially maritime ones.

Historically, the 1990 unification between North Yemen and South Yemen generated factional conflict that progressively eroded state capacity, culminating in total collapse after 2014, when the Saudi military intervention transformed the Red Sea region into an arena of regional proxy war.

However, it is precisely this state collapse that has paradoxically elevated Yemen to the central role of the Red Sea, transforming a fragmented and impoverished country into a player capable of disrupting international trade flows at the hands of the Houthis. The latter are officially known as *Ansar Allah*: a Yemeni militant movement of Zaydi Shia origins based in the province of Saada, in northern Yemen.

The year 2004 marked the Houthis' definitive transition from a cultural and religious movement to an armed rebel group opposing the Yemeni central government led by President Ali Abdullah Saleh. The uprising officially began when government forces attempted to arrest their leader, Hussein al-Houthi, accusing him of sedition and anti-state activities. Since then, the group has gradually transformed its local struggle into a significant political and military force, capturing the capital Sana'a in September 2014 and gaining control over much of northern Yemen.

However, Yemeni is not a monolithic entity; it is characterized by deep divisions, influenced by a British colonial presence in the south, which is predominantly Sunni Muslim, separated from the predominantly Zaydi Shiite north, where colonial presence was almost entirely absent. These two realities coexist with dozens of historically independent clan-based ethno-religious federations that control specific areas of the territory.

Religious communities range from Salafis to Shafi'is, creating a mosaic of local identities that transcends the Houthi-government dichotomy.

These clan-based and religious structures constitute a complex, dynamic system and represent a multitude of points of negotiation, mediation, and conflict that every external actor must firmly consider in order to consolidate territorial influence.

With technical and strategic support that Iran provides to the actors of the Axis of Resistance, the Houthis have developed sophisticated drones, ballistic missiles and cybercapabilities that enable them to threaten commercial traffic in the Red Sea. Through their integration into networks of illicit arms and fuel trafficking, maritime smuggling, extortion, and coercive taxation of the local population, the Houthis are able not only to consolidate forms of territorial control, but also to sustain their operations at sea. The integration of criminal practices finalizing the organization and its political-military activities makes the Houthis a hybrid actor that exploits a war economy model while maintaining typical features of criminal organizations (see *Fluid Borders and Hybrid Actors*).

These elements help to determine the strategic alliances and competition among the Houthis with other non-state actors in the region, ranging from strategic collaboration with al-Qaeda in the Arabian Peninsula (AQAP) to exchange with al-Shabaab in Somalia via networks in the Red Sea and the Gulf of Aden. These connections destabilize the Gulf monarchies, which depend critically on control of the Strait of Hormuz for energy security and global maritime trade. The attacks have led to a gradual militarization of the area between Bab al-Mandab and the Suez Canal.

Several international initiatives have significantly reduced the activity of these groups. Beginning in late 2023, the United States has promoted the multinational naval mission Operation Prosperity Guardian, aimed at protecting

commercial shipping. At the same time, the European Union has launched Operation Aspides, with a defensive mandate for escort and surveillance. This enhanced naval presence has transformed the Red Sea into one of the most congested and potentially unstable theaters in the global maritime system, increasing the risk of incidents, accidental escalations, and direct clashes between state forces and a non-state actor equipped with advanced missile capabilities.

The Red Sea Crisis has turned Yemen into a flashpoint of instability for global supply chains, due to a 57.5% collapse in average daily volumes transiting through the Suez Canal between late 2023 and early 2024. By February 2025, the container shipping capacity rerouted around the Cape of Good Hope had increased by 60%, adding 10 to 14 days to transit times and pushing the World Bank's Global Supply Chain Stress Index to 2.3 million TEUs, levels comparable to the peak of the COVID-19 pandemic.

This maritime "territorialization" by the Houthis is supported by an increasingly sophisticated arsenal, which includes anti-ship ballistic missiles with a range believed to reach 800 km. Nationally, the crisis has devastated Yemen's economy: GDP contracted by 1% in 2024, following a 2% decline in 2023, while the Yemeni rial plummeted by 33% year-over-year in government-controlled areas by June 2025. These economic shocks have pushed food insecurity to "catastrophic" levels (IPC Phase 5), with over 18 million people expected to suffer from acute hunger by early 2026, a situation exacerbated by a 13% decline in food imports and a 28% decline in fuel imports through the ports of the Red Sea. In the insurance sector, premiums for war risk coverage for travel in the Red Sea rose from a nominal 0.07% in October 2023 to 2% of the vessel' s value by the end of 2024, adding hundreds of thousands of dollars to the cost of individual shipments and cementing the scenario of "fragmented conflict" as the current high-probability reality.

As of May 2026, the Red Sea corridor remains in a state of precarious, conditional deterrence, with the Joint Maritime Information Centre (JMIC) maintaining a critical regional threat level, despite a recent tactical lull in kinetic attacks. The geographic scope of the crisis has consolidated around the southern part of the Red Sea and the Bab al-Mandab Strait, where Houthi forces have shifted carrying out attacks in response to Israeli-U.S. strikes on Iran, which began on February 28th, to establishing a virtual maritime blockade against ships match their target profile, particularly those with ties to Israel, the United States and the United Kingdom.

3. Impact of the Saudi Blue Economy in the Red Sea

by Sante Grande

The disparity among the routes has become a permanent feature of global logistics: Asia-Europe routes remain the most affected, with freight rates in early 2026 estimated to be between 25% and 40% above baseline levels. Major shipping lines such as Maersk and Hapag-Lloyd continue to treat the detour via the Cape of Good Hope as a standard operating procedure, absorbing approximately 6% of global fleet capacity and adding 10-14 days to transit times. This delay causes a backlog in Asian ports and shortages in destination ports, leading to geographic imbalances in the availability of port equipment that increase operating costs. On trans-Pacific routes, the impact is relatively milder, but still significant, with rates between Asia and the US East Coast experiencing a surcharge of 15-25% decrease due to the ripple effects of the shortages of ships and reduced container availability in destination areas.

Furthermore, strategic shifts have accelerated the use of the Eastern Maritime Corridor (EMC) between India and Russia, which has seen coal shipments increase by 87% and crude oil shipments by 48% by early 2026 as a direct response to the volatility at the chokepoints of Suez and Hormuz. Although the Suez Canal Authority (SCA) has recorded a modest recovery, with revenues totaling $449 million in the first six weeks of 2026 (a 22% increase from the lows of 2025), the canal is still operating well below the peak reached in 2023. Cumulative revenue losses since the start of the crisis are estimated at $10 billion, placing Egypt at what President Al-Sisi has called a "historic crossroads".

This revenue shortfall has forced a 17% increase in the price of fuel nationwide, highlighting how **maritime insecurity directly translates into economic instability on land in the region**.

The Houthi movement's maritime strategy is now characterized by a shift toward high-tech asymmetric warfare, including the alleged deployment of unmanned underwater vehicles (UUVs) and cyber-disruption operations. Analysts at Global Security Review suggest the current lull is a phase of strategic consolidation. The group is reportedly repositioning coastal missile batteries and increasing its readiness to launch drones in response to a broader regional escalation, suggesting that a return to active hostilities remains the most likely scenario for the remainder of 2026.

Saudi Arabia positions itself as a key geopolitical pivot, maintaining a strategic hedging strategy among rival powers. The alignment of the Saudi geopolitical vision with economic priorities from Vision 2030 place the kingdom as a crucial player in both the competition between China's Belt and Road Initiative (BRI) and the India-Middle East-Europe Economic Corridor (IMEC) as well as in maintaining the stability of the Red Sea. Saudi Arabia's ability to negotiate simultaneously

with China, India, and the United States, without completely subordinating itself to any one country, represents a strategy of relative autonomy that reflects the region's emerging multipolarity.

In this context, as briefly presented in the previous chapter, Saudi seaports are alternative focal points for global trade, thanks to their cutting-edge infrastructure, the excellent operational capabilities, and the strategic position at a crossroads between Asia, Europe and Africa.

Saudi Arabia's maritime projection represents one of the most significant geopolitical transformations in the Middle East. As per *Context Analysis* . its Vision 2030 strategic program, Riyadh intends to overcome its structural dependence on oil and redefine its role in the global economy. Within this framework, the sea becomes a central axis around which economic, industrial, and political ambitions are articulated. The Red Sea is one of the world's most important maritime corridors, connecting the Mediterranean to the Indian Ocean via the Suez Canal and representing a mandatory passage for a significant amount of global tonnage and energy exports. For this reason, Riyadh has launched an integrated strategy that combines the construction and modernization of port infrastructure with the creation of a maritime industrial sector and targeted reforms to attract international investment.

Saudi Arabia aims to become a major player in shipbuilding, logistics, and advanced maritime services by developing internal capabilities while also forging strategic partnerships with international players.

This is the context, for example, of the agreement with Fincantieri, which provides for cooperation in the development of port infrastructure, shipbuilding, and services related to nautical and maritime tourism. These agreements are not limited to the technological know-how transfer, but contribute to creating an integrated industrial ecosystem.

The creation of the Saudi Red Sea Authority enables the transition from fragmented management to a coordinated, more efficient, attractive, and integrated system, in which economic development, regulation, and sustainability are managed within a single strategic vision.

The growth/innovation model is based on a progressive automation of port operations, from container terminal management to real-time monitoring of goods with the aim of **improving efficiency, reducing costs and increasing international competitiveness**. An example could be the smart port implementation supported by government programs such as the National Industrial Development and Logistics Program (NIDLP). Through technological standards improving operational efficiency and port management processes, such as container terminal automation, cargo flow management, real-time cargo monitoring, maritime traffic control systems, and digital solutions for warehouse and inventory management. All of

this is supported by public-private partnerships. Among the most significant innovations are blockchain-based platforms, essential for ensuring security and transparency in supply chains, and data analysis systems associated with predictive maintenance, which optimize operational performance and contain costs.

Despite the favorable outlook, the sector faces some significant challenges, including high initial capital requirements, a shortage of specialized skills, and growing cybersecurity risks.

In addition to the maritime infrastructure, of notable relevance is rail connectivity. Objective of the Kingdom is to **expand the railway network, connecting the northern lines with the eastern ones** for the transit of goods, thus becoming arteries connecting cities to ports.

However, this ambitious strategy develop in a highly unstable geopolitical context, which profoundly affects its prospects. As described in the *Context Analysis*, the Red Sea has become a veritable theater of international competition, an increasingly congested and contested space where regional and global interests intertwine. In this scenario, the most immediate and concrete threat to Saudi Arabia is posed by the Houthis, who have developed asymmetric warfare capabilities capable of directly targeting maritime traffic. Logistically, the increased risks reduce the competitiveness of Saudi ports and undermine the ambition to become a central hub in global supply chains. In this sense, the Houthi threat is a structural factor that affects Riyadh's strategic choices in the long term.

Faced with this situation, Saudi Arabia has progressively changed its stance, shifting from a predominantly military approach to a more pragmatic, de-escalation-oriented one. After years of direct intervention in the Yemeni conflict, Riyadh has initiated indirect negotiations with the Houthis and supported diplomatic initiatives aimed at reducing tensions in the region. This evolution reflects a growing awareness that **security in the Red Sea is an essential condition** for Vision 2030 to succeed, and cannot be guaranteed solely through military means. It requires a **complex balance between deterrence, regional cooperation, and regional integration into the mechanisms of international security.**

Ultimately, Saudi maritime strategy is an ambitious but intrinsically fragile project, characterized by a fundamental paradox: the more the Kingdom opens up to the sea and integrates into global flows, the more it exposes to external risks and asymmetric threats. The success of this transformation therefore depends on both the ability to attract investment and develop infrastructure, and the capacity to manage fast changing geopolitical environments, in which state and non-state actors can decisively influence economic dynamics. Through active participation (in terms of friendship and collaboration with neighboring states), the countries interested in the stabilization of maritime traffic in the Red Sea can help Saudi Arabia manage and secure the entire blue economy supply chain, and, at the same time, to

reduce the economic and political inequalities present in the area.

In this sense, Saudi Arabia's future as a regional maritime power will be played out not only in its shipyards and ports on the Red Sea, but above all in its ability to stabilize a maritime space that, today more than ever, represents one of the critical nodes of the global order.

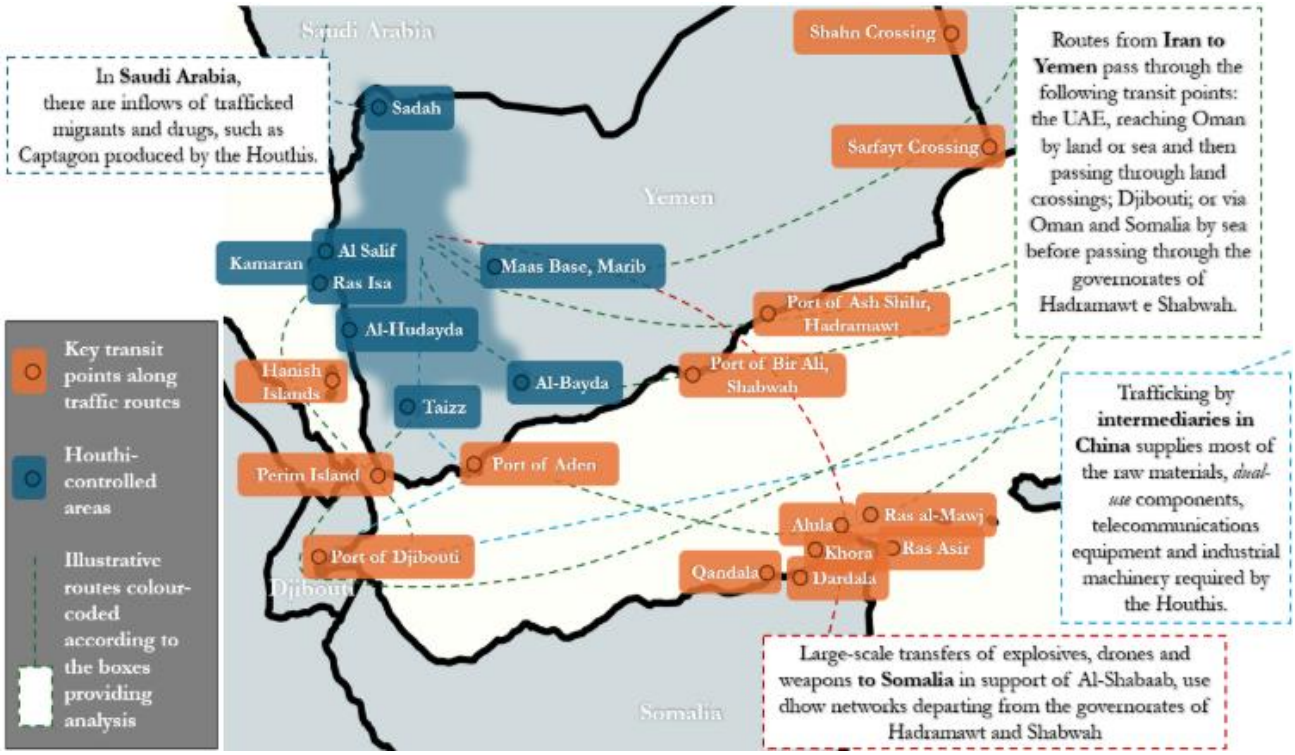
4. Fluid Borders and Hybrid Actors

by Marisa Cocchiaro in collaboration with Lisa Borlotti, Sante Grande

In the context of **strategic competition and the vulnerability of maritime routes,** regional instability is not limited to redefining the balance of power among state actors, but also creates operational space for non-state actors, who, to sustain their political and military activities, increasingly resort to illicit economies and hybrid models of financing linked to the nexus nexus between crime and terrorism. This link includes both terrorist groups directly involved in illicit activities to finance their own operations and the formation of alliances with criminal organizations to obtain logistical support.

Although no groups that strictly represent these definitions, it is nevertheless possible to identify an operational and functional continuum between organized crime and terrorism. A single group may, in fact, oscillate between criminal and political motivations depending on the context in which it operates, giving rise to hybrid entities that exhibit both sets of characteristics simultaneously. These are groups involved in arms smuggling, money laundering, and drug trafficking as a means of obtaining resources to be used to achieve political, religious and/or ideological objectives.

Ultimately, the interaction between crime and terrorism strengthens the organization, which becomes capable of challenging the legitimacy of the state and replacing it in many of its functions.



Fine map for the orientation representation of the routes described in the[Final Report of the Panel of Experts on Yemen (United Nations Security Council, 17 October 2025)]. Produced by Marisa Cocchiaro starting from MapChart.net

The paradigm outlined above explains how the Houthis use illegal trafficking networks in the Red Sea and the Gulf of Aden, a trend that has been on the rise in recent years, to gain both economic and strategic advantages: to increase foreign revenue used to finance the war and to facilitate the constant flow of military supplies from Iran.

The Red Sea and Gulf of Aden routes are the ones most frequently used for illicit trafficking involving the Houthis. Precisely for this reason, in recent years there has been an increase in controls along these routes.

In response to the rise in seizures, the Houthis have demonstrated a strong **ability to adapt:** when international or local authorities manage to target a specific channel, the organization responds by rerouting flows in a timely manner to avoid disrupting supply chains.

This evolution has led to the involvement of international actors located well beyond regional borders, with China emerging as a major source of dual-use components and materials.

Furthermore, the illicit trafficking itself has significantly diversified, extending beyond weapons and military components to include narcotics, telecommunications equipment, pesticides, medicines, and Yemeni cultural artifacts.

This complex network is supported by a combination of Yemeni and foreign entrepreneurs (who acts mostly as front men), local tribal networks, and pragmatic alliances with militant armed groups such as al-Shabaab and AQAP, which facilitate the transit of goods through the Horn of Africa and Yemeni territories.

Since shipments destined for the Houthis must pass through landing points on the coast of Yemen, containing depends largely on the capacity for surveillance and interdiction along the country's coastline; however, this capacity is structurally limited due to state fragmentation and weakness of its security apparatus, making it inevitable that recourse to form of forms of international cooperation and support. In this

What is being shipped on these routes?

Advanced weapons systems: **Ghadir** cruise missiles, **Misagh** series man-portable air defense systems (**MANPADS**), **AM-50 Sayyad** anti-materiel rifles, warheads, seekers, and chemical precursors (ammonium nitrate) for propellants.

Drone (UAV) Components: Motors (**Shahed** and **DLE** series), flight controllers (**Pixhawk V5+**), GPS modules, carbon fiber for wing structures, and complete kits for home assembly.

Surveillance Technologies: **AIS receivers (Cypho-150)** for naval tracking, spectrum analyzers (**Signal Hound**) for wireless monitoring, thermal cameras, and **Motorola** radio equipment.

War Economy: Fuel and raw tobacco for the illicit production of cigarettes; transnational trafficking of **Captagon**, methamphetamines, and African migrants, used as primary sources of self-financing and social control.

regard, the Security Council has repeatedly explicitly called on the international community to collaborate in strengthening the capabilities of the Yemeni Coast Guard (YCG) to address the security crisis in the Red Sea and ensure maritime stability in the area.

In order to provide a set of scenarios useful to decision-makers, it is essential to analyze the dynamics among state and non-state actors operating in this complex and constantly evolving context by addressing the following three guiding questions:

1. How does the strengthening of the YCG specifically affect the control of maritime routes and the safety of navigation in the Red Sea?

2. How could cooperation between Saudi Arabia and other forces improve the capabilities of the Yemeni Coast Guard?

3. Why is combating smuggling and illegal trafficking in the Red Sea important for reducing the operational capacity of the Houthi presence?

4.1 How does the strengthening of the YCG specifically affect the control of maritime routes and the safety of navigation in the Red Sea?

The strengthening of the YCG has a direct impact on the control of maritime routes in the Gulf of Aden and the Red Sea. Given the central importance of this maritime region for global trade (see. *Security in the region: freedom of navigation, conflict and infrastructure*), strengthening the YCG would enable it to become a valuable partner in defending Yemeni waters and the maritime routes that pass through them, as well as in the fight against organized crime. This would mean creating a first line of defense against the flow of illegal goods that fuel regional conflicts and organized crime, enhancing the capacity to identify threats, and ensuring a secure maritime environment.

The strengthening of the YCG would have different implications depending on the strategic vision guiding it. If conceived as a tool of the internationally recognized government to exercise the monopoly on legitimate use of force in territorial waters, it would align with Western-centric state logic. However, it could just as easily be interpreted as strengthening the capacity for local self-determination, the protection of the fishing rights of Yemeni coastal communities, or resistance to external extractive logic. Similarly, control of maritime routes does not necessarily mean "openness to global trade": it could also mean autonomously

defining transit conditions, managing marine resources according to local priorities, or negotiating from a position of strength with regional and international actors. Despite these critical observations regarding state governance, it is important to recognize that the strengthening of the YCG has achieved significant milestones in combating illicit trafficking along Yemen's coastline, leading to a sharp increase in the number of intercepted shipments carrying Iranian military supplies intended for the Houthi forces. Among the successes are the seizure of advanced communication equipment and *dual-use* components for missiles and drones, which directly weaken the offensive capabilities of non-state actors.

In the fight against drug trafficking, the enhancement of patrol and boarding capabilities has led to significant interceptions, such as the seizure of three metric tons of hashish and crystal methamphetamine.

Second, while international programs aimed at further enhancing this capability are underway, the YCG has developed a greater understanding of the dynamics affecting its own territorial waters. The strengthening Maritime Domain Awareness (MDA), defined as the ability to monitor, analyze, and share information related to the maritime domain in real time, has been achieved through targeted mentoring and training activities and through the strengthening of infrastructure and operational equipment. On the one hand, the YCG's training programs help improve coordination among the actors involved in international programs, with the aim of facilitating a more timely and integrated response to threats posed in the Red Sea. On the other hand, training courses in naval engineering help ensure the operational readiness of the fleet and maintain its long-term functionality.

Furthermore, the installation of vessel traffic control systems enables real-time tracking of vessels and the early detection of suspicious activity. However, this system requires continuous modernization in terms of high-speed patrol boats and coastal surveillance technologies capable of intercepting even untracked vessels, as well a greater exchange of intelligence information sharing with actors on the ground. These objectives are at the heart of the Yemen Maritime Security Partnership (YMSP).

Finally, the YCG plays an important role in Yemeni economic recovery, the security of key infrastructure in the region and the functioning of international missions active in the area. An efficient YCG would facilitate the resumption of oil exports from southern ports. The restoration of these exports would increase government revenues, allowing for reinvestment in public services.

In addition to exports, the YCG ensures the security of vital ports such as Aden and protects coastal oil pipelines from sabotage. Finally, the YCG bridges the gap between high-level naval protection and coastal security by serving as a

local partner for international coalitions and missions, including EUNAVFOR Aspides.

4.2 How could cooperation between Saudi Arabia and other forces improve the capabilities of the Yemeni Coast Guard?

International coalitions led by Saudi Arabia and the United Arab Emirates have significantly improved the operational efficiency of the YCG, as evidenced by a marked increase in seizures of illegal cargoes destined for Houthi forces during 2025.

Among the multilateral initiatives: The Regional Program for Maritime Security in the Red Sea Area, led by the European Union, and the Combined Task Force 153 (CTF-153) led by the United States, both established in 2022, and focused on combating arms trafficking and ensuring compliance with regional security agreements.[5]

More recently, the international conference hosted in Riyadh, in September 2025 had as its primary objective the strengthening of YCG's capabilities.

Among the key outcomes of the conference was the launch of the Yemen Maritime Security Partnership (YMSP), led by Saudi Arabia in collaboration with several countries, including the UK, the US, and entities such as the EU, as well as the establishment of a dedicated office in Saudi Arabia, managed through the Technical Assistance Fund for Yemen (TAFFY), tasked with coordinating the available resources. The YMSP aims to rebuild civilian infrastructure through specialized training, institutional support, and the provision of advanced equipment, including coastal surveillance systems and larger patrol boats. However, these tools are not accompanied by a fully implemented operational framework, and it is therefore premature to view them as game changer when it comes to Yemeni maritime capabilities.

Another key element is the UNODC Global Maritime Crime Programme (GMCP) which has been actively supporting the Yemen Coast Guard since 2019. In practice, this has led to "an effective collaboration, which has made it possible to enhance the skills of Yemeni Coast Guard personnel and to support the rehabilitation of equipment and the strengthening of operational capacities."[6]

[5] The lines of cooperation in this area have been extensively explored in the Report for decision makers *Navigating the Red Sea Crisis: Migrants, Infrastructure, and Crime*

[6] Translation of the statement by Maj. Gen. Khaled Ali Saleh Al Qoumali, Chairman of the Yemen Coast Guard, reported in United Nations Office on Drugs and Crime (UNODC), *Global Maritime Crime Programme – Briefing Package 2025*, relating to cooperation with the GMCP programme in developing the operational capabilities of the Yemeni Coast Guard.

4.3 Why is combating smuggling and illegal trafficking in the Red Sea important for reducing the operational capacity of the Houthi presence?

When considering the developments of the Houthi movement within the broader, complex and dynamic context of the conflict in Yemen, as described in the *Context Analysis* and in *Security in the region: freedom of navigation, conflict and infrastructure,* the ability of non-state actors to sustain and project such a high level of armed opposition diverges sharply from the parameters of conventional conflicts: violence is no longer the exclusive domain of states, and the means available to destabilizing actors go far beyond military capabilities. In this context, a non-state actor such as the Houthis has transformed from a local group to a "quasi-state power" with a regional sphere of influence: while at the local level they interact with tribal networks integrated into patronage networks that allow them to control the territory, to ensure their survival and development, the Houthis have forged pragmatic alliances with al-Shabaab in Somalia and with AQAP, with whom they exchange logistical support for weapons and practical training (see MENA). The civil war in Yemen can properly be defined as an asymmetric war.[7] An asymmetric war is characterized by blurred lines between political and ideological objectives and purely criminal interests, where non-state actors employ irregular tactics to counter technologically superior powers. In the context under analysis, the vast difference between the means employed by the factions highlights the asymmetries of the conflict: while on one side we find an international coalition with resources at its disposal that include state-of-the-art equipment, on the other, the Houthis use a low-cost arsenal obtained from dual-use technologies.

Despite this, the direct confrontation seems increasingly likely, a claim supported by explicit threats posted on the Houthis' official websites warning of imminent attacks against ships and oil infrastructure, describing such actions as moral obligations.

In light of the Israeli-US attacks on Iran, beginning on February 28, 2026 and the regionalization of the conflict, direct support from Iran is likely to diminish.

In this scenario, the Houthis are therefore incentivized to intensify their reliance on illicit economies. This process, already underway, results in greater reliance on transnational networks for the trafficking of military components, narcotics, and human beings, consolidating a funding model that is increasingly autonomous and less tied to the Iranian axis.

The trend of theHouthi involvement in drug trafficking is already on the rise. This includes,

[7] A concept that finds its theoretical foundation in Mary Kaldor's analyses of the "new wars." See Kaldor, M.*New and Old Wars*. Stanford University Press, Stanford, 1999.

but is not limited to: the illegal production and trade of cigarettes, the production and distribution of Captagon (amphetamines), the distribution of khat and sedatives, and the transit of heroin from Afghanistan. The literature on the nexus between crime and terrorism presented above highlights how a movement such as that of the Houthis, which manages to develop the internal capabilities necessary to engage directly in various criminal activities ranging from the simple purchase of weapons to involvement in drug trafficking, often gains greater operational and organizational control. Furthermore, the profits derived from drug trafficking, in the long term, enable these groups to provide social services and position themselves as a valid alternative to the recognized state, thanks to their ability to exercise a form of governance in the areas under their control. In this way, by securing significant local support, they consolidate their power base in the territory. However, their ability to maintain territorial control does not simply represent a "deviation" from the centralized nation-state model, but rather the consistent expression of decentralized traditions deeply rooted in Yemeni history. Clan and religious structures constitute a complex, dynamic system and represent a multitude of nodes of negotiation, mediation, and conflict. Consequently, interpreting Houthi control as a temporary obstacle to the restoration of state authority implicitly presupposes a unitary governance model that is neither universal nor necessarily desirable within current Yemeni political traditions. The resilience of their governance depends not only on economic resources, but also on alignment with local identities, tribal structures, and religious narratives that predate the modern nation-state, making it increasingly complex to restore state authority according to a centralized model (see *Yemen in the Red Sea*). Focusing efforts on combating the aforementioned trafficking activities means limiting the organization's operational capacity not only from a financial standpoint but also in terms of support from the local population, taking into account the complex and dynamic sociocultural system that defines a multifaceted and multilevel context that must be considered.

These dynamics constitute an increasingly relevant factor for regional security: the intensification of the Houthis' involvement in illicit activities translates into a growing risk of consolidating their financial and operational capabilities, as well as their territorial entrenchment. It is no coincidence that the European missions EUNAVFOR Aspides and Atalanta are progressively expanding their operational mandates to include specific measures to combat smuggling and illicit trafficking although their implementation remains limited due to local partners whose capabilities are still inadequate in terms of maritime surveillance, availability of naval vessels, and the effectiveness of interdiction

mechanisms and the integrity of legal and judicial enforcement systems.

In conclusion, instability in the Red Sea has enabled the Houthis to operate along a continuum between crime and terrorism to support their political and military objectives. Through its control of illicit networks dealing in weapons, dual-use goods, and narcotics,the group has transformed itself into a quasi-state power, capable of exercising a form of governance that challenges the legitimacy of the state. It is also concluded that, given that the maritime routes of the Red Sea and the Gulf of Aden are of paramount importance both for international trade and for the activities of the Houthis, strengthening the YCG represents a crucial step toward ensuring regional stabilization and the protection of global trade routes.

5. Regional Security: Freedom of navigation, conflicts and infrastructures

by Andrea Speziale

In this chapter, the area is analyzed from a security point of view, in the light of the numerous conflicts and crises that still affect the countries bordering the Red Sea and the areas immediately adjacent to it. As regards the security aspects of the countries of the Horn of Africa bordering the Red Sea, a more extensive discussion can be found in the previous Report for decision-makers *Navigating the Crisis of the Red Sea: Migrants, Infrastructure and Crime*.

The issues strictly related to security in the Red Sea region are divided here into three main, closely interrelated topics:

- the situation of **military and political conflict** which affects the countries that have interests in the area;
- freedom **of navigation**;
- the risks of damage to **network infrastructure** in the region.

Specifically, the reference is to Yemen, on the Bab al-Mandeb Strait, one of the three regional chokepoints vital for international trade (together with the Strait of Hormuz and the Suez Canal). The shipping lanes passing through this area remain crucial strategic routes, used by Iran to ensure a constant flow of weapons and military supplies in support of the Houthi forces, fueling the link between crime and terrorism, as already analyzed in the paragraph *Fluid Borders and Hybrid Actors*.

The Yemeni complex system (in detail in chapter *Yemen in the Red Sea*) is central due to its geographic location, which allows it to control access to the body of water through the Bab al-Mandeb Strait, a chokepoint and the southern gateway to the Red Sea, which is in turn bounded to the north by the Suez Canal connecting it to the Mediterranean. Currently, there are no equally advantageous viable alternatives to bypass the route via Bab al-Mandeb and Suez, making this region one of the most important hubs for global maritime traffic.

5.1 From civil war to internal political fragmentation

The events in the Red Sea have highlighted the fluid system of alliances.

Internal political developments shaped by non-state actors, a civil war that has been going on since 2014 and the external relations of the various factions with other international actors, such as Saudi Arabia, the United Arab Emirates, Iran, Israel and the United States, contribute in shaping the security structure of the region.

In the Yemeni civil war, the main international actors involved in the conflict were:

- Saudi Arabia: which hosts the country's internationally recognized government, the Presidential Leadership Council, PLC;
- The United Arab Emirates: which supported the Southern Transitional Council, STC;
- Iran: in support of the Houthis.

These are the three main factions that controlled much of Yemen's territory for about a decade between 2014-2015 and early 2026. In January 2026, the PLC, backed by Saudi Arabia, launched a massive offensive aimed at capturing Aden, which was controlled by the STC. The operation ended with the capture of the city, the dissolution of the STC and the escape of its leader, Aidarus al-Zubaidi, who fled by ship to Somaliland where a flight to Abu Dhabi was waiting for him.

Saudi Arabia sees Yemen as a matter of land security and border stability, and aims for a unified, pro-Saudi Yemeni state. The United Arab Emirates, on the other hand, pursues a maritime and geoeconomic strategy, supporting individual actors and seeking control over Red Sea ports and coastlines. These two visions have turned the two countries into strategic competitors in the Yemeni arena.

The rivalry between the two states is not limited to the Yemeni theater, but also extends to ongoing conflicts in other countries in the Red Sea and Horn of Africa region: Saudi Arabia and the United Arab Emirates find themselves on opposing sides in the civil war that has been raging since 2023 on the other side of the Red Sea, in Sudan.. In the context of this conflict in the African country, Abu Dhabi and Riyadh respectively support the Rapid Support Forces (RSF) and the Sudanese Armed Forces (SAF).

Despite the differences, however, the two actors are united by a shared hostility towards Iran, particularly following the attacks launched by Tehran against Saudi Arabia and the United Arab Emirates in retaliation for the US and Israeli airstrikes that began in February 2026.

These significant local geopolitical tensions have repercussions on a global scale: a series of events known in the media as the "Red Sea Crisis".

5.2 The conflict with Israel and the beginning of the Red Sea crisis

As already mentioned, although the roots of the crisis lie deep in the history, societies and balance of power of the region, its onset can be traced to the events of October 7, 2023.

On that date, Hamas (an acronym for *Ḥaraka al-muqāwama al-islāmiyya*, Islamic Resistance Movement) launched a raid into Israeli territory and the following day, October 8, the Israeli government led by Prime Minister Benjamin Netanyahu declared a state of war. Military operations have therefore begun to liberate the Gaza Strip from Hamas militants, effectively invading Palestinian territory.

The events in Gaza triggered the complex network of transnational relations of the Axis of Resistance, a system of more or less consolidated alliances between non-state actors, which includes Hamas and the Houthis, supported by Iran.

On November 19, 2023, the Houthis seized a cargo ship, the Galaxy Leader, near the Yemeni port of Hodeidah, claiming that it was linked to Israel and that all ships associated with Israel would be legitimate targets for the armed forces. The ship was subsequently diverted to the

Yemeni port, and the crew was taken hostage and released only in 2025.

By the first months of 2024, the Houthis had attacked about 40 boats between the Gulf of Aden and the Red Sea. Ship tonnage transiting the Red Sea decreased by 70% between the first half of December 2023 and January 2024, as a result of the numerous attacks on ships by the Houthis. During the same period, on the other hand, shipping traffic off the Cape of Good Hope, the main alternative route between Asia and Europe, increased by 60%.

One of the key factors in such a drastic reduction in vessel traffic in the region has been the increase in insurance premiums for vessels. Although the number of truly significant attacks (involving hijacked or even sunk ships) has been quite small, the increase in risks to navigation has turned into an increase in insurance premiums for ships. The mere threat has made transit to the Red Sea economically unsustainable, forcing shipping companies to adopt the significantly longer, but safer, route of Cape of Good Hope.

5.3 US military intervention and Houthi war capabilities

In December 2023, the United States launched Operation Prosperity Guardian, leading a multinational coalition that includes, among others, the United Kingdom, France, Italy and Spain.

On January 10, 2024, the United Nations Security Council (UNSC) adopted Resolution 2722 (2024) calling on the Houthis to immediately suspend attacks on commercial and merchant vessels.

On January 12, 2024, the US-led coalition began airstrikes on key Houthi military sites in Yemen.

On February 19th, 2024, the European Union launched the EUNAVFOR Aspides mission to protect freedom of navigation and protect merchant and commercial vessel traffic in the Red Sea, the Gulf of Aden, the Arabian Sea, the Gulf of Oman and the Persian Gulf.

The operations conducted by the US and its allies against the Houthis, notably, Operation Rough Rider, a massive US bombing campaign between March and May 2025, led to a series of diplomatic meetings between representatives of the two factions which, with the mediation of Oman, ended with a ceasefire in early May 2025. The agreement provides for an end to attacks on US ships in the Red Sea, but the Houthis have excluded Israeli targets from the ceasefire, which have continued to be possible targets.

Although from a strictly military point of view, the Houthi forces are not comparable to those of Western countries and the United States, they have nevertheless developed a significant capacity in the drone sector over the years. The advent of unmanned vehicles on the battlefields has drastically changed the approach to conflict, greatly benefiting all those actors, such as the Houthis, who cannot have a high-level industrial, financial and technological apparatus. The cost of a drone, in fact, is around a few tens of thousands of dollars, while the missiles needed to intercept them cost millions of dollars.

According to a July 2025 report by the Orion Policy Institute, although the Houthis claim to design and manufacture their own unmanned aerial vehicles (UAVs) domestically, there is unequivocal evidence that many of the components used in their technology come from Iran. Nevertheless, the Houthis have proven capable of both producing specific components for drones on Yemeni territory and sourcing the components from civilian sources outside Iran. These aspects introduce new elements of asymmetric warfare, as already discussed both in *the Context Analysis* and in chapter *Fluid Borders and Hybrid Actors*. The supply network at the heart of which the Houthis are located makes extensive use of *dual-use goods,* including drone motors, GPS modules, electronic sensors and telecommunications equipment, which are often imported from China and other international markets under the guise of industrial machinery or lawful civilian components.

In addition to the use of civilian drones converted for military use, which are primarily employed locally due to their limited flight range of just a few kilometers, the Houthis also have military-type UAVs, including:

- **Qasef** (probably of Iranian origin), used as kamikazes for their payload capacity up to 30kg and a range of 120km;
- **Sammad** (also reported as Samad), capable of carrying an explosive warhead up to 1500km away and also used to strike targets even within Israeli territory;
- **Waid**, particularly advanced and almost certainly imported, used primarily to hit naval targets.

5.4 Risks to the network infrastructure in the region

In addition to issues related to freedom of navigation and the continuation of the Yemeni civil war, a further vulnerability due to regional instability concerns the risks of damage to the network infrastructure.

In fact, several submarine cables run through the Red Sea, providing internet connectivity to the countries on both sides. Notably, Yemen is connected to the global network by a relatively limited number of cables and via only three coastal cities (Al Ghaydah, Aden and Al Hudaydah).

- FALCON, Africa-1, Asia-Africa-Europe-1 (AAE-1) and SeaMeWe-5: long cables that connect China, Southeast Asia and India with the Middle East, the Persian Gulf, the Red Sea, the Horn of Africa, the Mediterranean and Southern Europe through numerous branches.
- Aden-Djibouti: a cable that connects the two ports of the same name on opposite sides of the Red Sea.

In addition to the cables that connect Yemen, an enormously larger number of cables are laid on the seabed to connect East Asia, the Indian Ocean, the Middle East, East Africa and Europe, making the Red Sea one of the main hubs of world internet traffic.

In February 2024, following the damage to four of the main cables crossing the Red Sea, the Israeli government accused the Houthis of deliberately targeting these infrastructures, while the Houthis denied their involvement. On that occasion, the damage was then attributed to the bulk carrier Rubymar (flying the flag of Belize), hit by Houthi missiles, which after drifting (also causing environmental damage due to the loss of oil and fertilizers at sea) dragged the anchor to the seabed and cut the cables. On this occasion, it was estimated that 25% of data traffic between Europe and Asia was interrupted.

On September 6, 2025, major damage was detected to numerous undersea cables near the Saudi port city of Jeddah. This incident caused major disruptions to internet services in India, Pakistan, Saudi Arabia and the United Arab Emirates. Also on this occasion, the Houthis did not claim responsibility for attacks on infrastructure.

A further problem is the difficulty of repairing damaged cables. In fact, regional instability and the high risk of attacks by the Houthis significantly slowed down the repair operations of damaged cables in September 2025 and also the laying of new ones.

Also due to security risks, in November 2025 Meta postponed the completion of the Red Sea section of the 2Africa cable (which runs from Asia to the Gulf of Aden, without crossing the Bab al-Mandeb Strait and therefore without connecting Djibouti, Eritrea, Sudan, Yemen and Saudi Arabia) and more recently, in March 2026, for the same risks, the laying of the cable that should enter the Persian Gulf from the Strait of Hormuz has been postponed. Google's Blue-Raman cable also suffered similar delays in laying.

5.5. The symmetries between Bab al-Mandeb and Hormuz

The security situation in the Red Sea is also closely linked to the events in the Persian Gulf, in particular since the beginning of the war between the United States and Iran following the attacks of February 28, 2026.

While Bab-el Mandeb is the chokepoint through which much of the trade between Asia and Europe passed, the Strait of Hormuz was the main route for transporting oil from the producing countries of the Middle East to East Asia. The blockade of Hormuz put in place by Iran (and later also by the US Navy) effectively cut fuel supplies for many countries that depended on imports from the region.

While the reduction in maritime traffic at Bab al-Mandeb was due to attacks carried out by the Houthis, in Hormuz it was Iran (the Yemeni group's main backer) that undermined the access to the Persian Gulf, making passage nearly impossible.

From a security point of view, the capabilities of the Houthis and Tehran are closely interconnected: the former need a strong ally that provides weapons, economic support and (albeit moderate) international legitimacy, while Iran can benefit from the Houthis as the main force of the Axis of Resistance (especially after

the significant downsizing of Hamas and Hezbollah in the invasions carried out by Israel in Gaza and Lebanon) and as an allied actor capable of providing fundamental support to continue the conflict with the United States, threatening the security of the Red Sea routes.

The growing insecurity in the Middle East and the dangers to navigation in the Persian Gulf and the Red Sea have had at least two major global repercussions, underscoring the strategic importance of this region:

- The **redesign of logistics and supply chains:** the impossibility of transiting through Suez has forced many shipping and transport companies to adopt alternative routes. These, although still very limited in traffic volumes, have nevertheless recorded significant increases. In particular, Russia could be among the biggest beneficiaries of the opening of a northern route from Asian ports through the Arctic to Europe from the north.
- The **redefinition of the balance of power between state and non-state actors**: the Houthis have shown that it is possible to use relatively cheap tools and dual-use technologies, such as commercial drones, to be able to hit ship traffic and block a maritime corridor of strategic importance. Despite US and European military operations and conflict with Israel, and despite its limited capabilities, the Yemeni group has been able to impact Western economies. In this perspective, Iran becomes a key interlocutor. This is true both for negotiating the reopening of the Strait of Hormuz and for bringing peace to the region, which could theoretically even lead to formal recognition of the Houthis as a legitimate actor by the states in the region. In fact, after the war, these states might prefer regional stability based on a Houthi-governed Yemen rather than a permanent state of conflict that is extremely damaging to the economy and exports.

Appendix:
Updates as of June 30, 2026

In addition to this report, some insights are provided regarding the events that occurred in the region after May 26, 2026, the date to which most of the information reported is updated.

In particular, the continuation of the conflict between the United States and Iran and the complex peace negotiations that are struggling to achieve significant results, the invasion of Lebanon by Israel and the persistence of the closure of the Strait of Hormuz (reopened only to a very limited extent) with the consequent economic repercussions on a global scale, have also influenced the political and security dynamics of the Red Sea.

As for the progress of the war between Tehran and Washington, a 14-point Memorandum of Understanding brokered by Pakistan (also known as the Islamabad Memorandum) was signed by the two sides on June 17, 2026. This document, which was intended to serve as a preliminary agreement ahead of subsequent negotiations to establish a definitive peace, sets out in very general terms a ceasefire on all fronts (including Lebanon), a reopening of the Strait of Hormuz, a reduction in international sanctions against Iran and the promise, by the Islamic Republic, to renounce pursuing atomic weapons. This agreement was immediately criticized by Israel, considering it non-binding as it was not a signatory, thus continuing the offensive in southern Lebanon. On June 26, the United States struck targets on the Iranian coast, claiming it was in response to an earlier attack by Tehran on a merchant ship transiting the Strait of Hormuz. The two sides continued to accuse each other in the following days, and tension between them escalated.

In the Red Sea, the Houthis, with Iranian support, on June 8 declared a total ban on transit for Israeli ships, which they regard as legitimate military targets. The Yemeni group continues to be a key ally for Iran for its ability to limit traffic through the Bab el Mandeb Strait and therefore access to the Red Sea.

In this context, which is constantly evolving, the potential risks for the security of the region concern three specific areas:

- freedom of navigation in the Red Sea: the Houthis have shown that they can significantly preclude access to Bab al-Mandeb and, together with their Iranian ally, are threatening two of the most important chokepoints of world maritime traffic;
- reaction of global financial markets: the Memorandum and the reopening of Hormuz caused the price of oil futures to plummet after the increase due to the months of war. However, tensions in the Persian Gulf and possible repercussions in the Red Sea could lead to a new crisis and undermine the renewed confidence of shipowners whose vessels transit through the region;
- military escalation in the Red Sea: In the last week of June, the Houthis intensified

military rhetoric and declared a general mobilization. The risk is that the military forces of the Yemeni group could strike the territory of Saudi Arabia (with which there has been a ceasefire since 2022). In the following days, the Houthis also declared that they are ready to strike any Israeli presence in Somaliland (a separatist region of Somalia that in December 2025 was officially recognized by Israel), a territory located right on the shore of the Gulf of Aden, opposite the Yemeni coast, hence its highly strategic value, as extensively covered in the previous work *Navigating the Red Sea Crisis: Migrant People, Infrastructure and Crime*.

Stabilizing the Red Sea region is an absolute prerequisite for maritime security and freedom of navigation, essential requirements for ensuring the uninterrupted operation of this vital artery of global trade and infrastructure networks.

Based on the factors and drivers analyzed, three possible scenarios are proposed below, respectively by low, medium and high probability based on key trends, which help the decision-maker navigate the landscape.

	Maintaining the Status Quo Amid Fragmentation, Conflict, and External Interference
Scenario 1 – High probability	**Political/social** The political situation, marked by competition between Saudi Arabia and the United Arab Emirates and opposition to Iran in Yemen, remains unchanged. There are no planned negotiations between state and non-state actors. The Houthis remain focused on their objectives, both domestic and those aimed at supporting their Iranian ally as part of the Axis of Resistance, which they continue to pursue by finding alternative ways to adapt. Conversely, Iranian support for the Houthis could diminish in proportion to Iran's involvement in the war with the US following the Israeli-US attacks of February 28, 2026. **Economic/technological** In this context, at least in the short and medium term, the Houthis strength transportation and supply routes to cope with a potential shortage of Iranian aid; by diversifying its sources of revenue, it is able to maintain its capacity for disruption in the Red Sea, resulting in a further slowdown in the progress of Vision 2030, thereby negatively impacting Saudi Arabia's ability to attract FDI and leading to a slowdown in the process of economic diversification. **Security** The internal and international conflict situation remains unchanged. Yemen remains divided into two main regions controlled by the Houthis (with the support of Iran) and by the internationally recognized government of the General People's Congress (backed by Saudi Arabia) within the broader context of the Middle East conflict between Iran and the US. Freedom of navigation in the Red Sea is not guaranteed, with consequent repercussions on global supply chains (increased transportation costs and insurance premiums). The importance of the Cape of Good Hope route is increasing, as is, to a lesser but growing extent, that of Eurasian land routes and the Arctic route, although their consolidation is not expected in the short to medium term. Submarine cables are potential targets for attacks, and their installation and any repairs are difficult, causing delays in the development of network infrastructure in the region. This scenario entails a greater risk of accidents, accidental escalations, and direct clashes, with the consequent need to bypass the Red Sea route.

	Clearly defined factions/internal governments arising with partial recognition
Scenario 2 – Medium probability	**Political/social** Saudi Arabia achieved success in bringing the regional state and non-state actors to the negotiating table. Consequently, clearly defined stable factions and internal governments arise despite the lack of consensus. A political alliance takes shape between Saudi Arabia and the United Arab Emirates aimed at stabilizing Yemen and, consequently, the Red Sea region, with possible support from extra-regional and international actors such as, the European Union, the US, Israel, and China. In this context, however, the Houthi movement remains a force that reacts but also acts autonomously, expanding their territorial control within Yemen. **Economic/technological** Overall, the conditions are in place for economic growth and the strengthening of relations among stakeholders within the region. **Security** The internal and international conflicts freeze. Yemen remains divided into two main regions that are partially recognized internationally (the Houthis and the PLC), but negotiations are underway and armed clashes between the parties have ceased. There is a perception of greater reliability in maritime security in the Red Sea. Sporadic local destabilizing events could occur, but they will not have a decisive impact on freedom of navigation. Maritime traffic returns to pre-crisis levels, and alternative routes remain marginal in global supply chains. Submarine cable laying and repair activities can resume without risk.

	A Unified and peaceful Yemen
Scenario 3 – Low probability	**Political/social** Current efforts by international actors to resolve the conflict in Yemen are yielding the expected results for a unified and pacified Yemen under a government recognized both locally and internationally. This context allows for an improvement in relations between Saudi Arabia and Iran, which in turn leads to Iranian participation in stabilizing the Red Sea by mediating the dialogue among non-state actors, specifically the Houthis. Relations between Saudi Arabia and the United Arab Emirates are also characterized by continuity and cooperation, given the end of the rivalry in Yemen. **Economic/technological** From an economic and technological standpoint, the Houthis disruptive power is weakened or even eliminated, as travel routes, supply chains, and illicit trafficking routes are disrupted and Iranian support is cut off. The volume of Foreign Direct Investment (FDI) increases in both Yemen and Saudi Arabia, enabling, respectively, innovation in existing infrastructure development and the continued implementation of the Vision 2030, specifically for projects related to the Red Sea. **Security** The internal conflict is resolved with the pacification of Yemen under an internationally recognized government. The region becomes completely safe for navigation and the laying of submarine cables, as well as for the stability of supply chains. Maritime traffic increases compared to pre-crisis levels, resulting in a loss of appeal for alternative routes. The militarization of the area subsides, giving way to cooperation among state and non-state, regional, extra-regional, and international actors .

Sources classification

Source reliability		
A	**Reliable**	**No doubt of authenticity, reliability, or competence**; it has a record of complete reliability.
B	**Usually reliable**	**Small doubts** of authenticity, reliability, or competence; it has a record of valid information in most cases.
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D	**Usually unreliable**	**Significant doubt** about authenticity, reliability, or competence; however, it has provided valid information in the past.
E	**Unreliable**	**Lack** of authenticity, reliability, or competence; record of non-valid information
F	**Not evaluable**	**There is no basis for evaluating the reliability of the source**

Content of the information		
1	**Confirmed**	**Confirmed** by other independent sources; **logical** in itself; **consistent** with other information on the topic
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3	**Possibly true**	**Not confirmed; reasonably logical** in itself; it is **consistent** with some other information on the topic
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5	**Unlikely**	**Not confirmed; not logical** in itself; **contradicted** by other information on the topic
6	**Not evaluable**	**There is no basis for evaluating the reliability of the source**

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