



The Influence of Sea Power in Iran's Proxy War Part 1: Houthi Aggression in the Red Sea

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BESA Center Perspectives Paper No. 2,244, December 19, 2023

EXECUTIVE SUMMARY: The escalation of the Israel-Hamas conflict to incorporate a maritime dimension provoked by a Houthi-led offensive against commercial shipping represents both an escalation and a significant strategic challenge. This development extends the conflict's impact beyond regional boundaries, threatening Israel's security, global maritime commerce, and the principles of international maritime law.

The ongoing Israel-Hamas War has taken on a surprising maritime dimension. Unseen since the 1967 Six-Day War, a belligerent in a conflict with Israel has adopted a strategy of attacking commercial shipping and blockading Israeli ports.

In the current conflict, the Yemeni Houthis, sponsored by Iran, have embarked on an aggressive offensive against maritime trade in the Bab-al-Mandeb Strait. Since mid-November, the Houthis have engaged in multiple anti-ship drone and missile attacks and numerous acts of piracy against commercial and military vessels. Yahya Saree, spokesperson for the Houthi movement, threatened that "all ships in the Red Sea headed for Israeli ports, irrespective of the flag they fly, will become a target for our armed forces." This activity has significant strategic implications, threatening not only Israel's security but also the entirety of maritime traffic through the Suez Canal.

Alfred Thayer Mahan, US Navy Rear Admiral and former President of the Naval War College, wrote in his acclaimed book *The Influence of Sea Power Upon History: 1660–1783* that maritime strategy is ultimately about access. This means ensuring that ports are safe from blockades, lines of communication remain open, maritime infrastructure remains unmolested, and command of the sea for fleet positioning, strike, early warning, and intelligence gathering remains viable. Most importantly, it's about secure commerce, a matter of national self-preservation. The Houthis are threatening this access for both Israel and global commerce.

In 2003, the Houthis, an Iran-supported Shia Islam political and military organization, became radicalized and belligerent, ostensibly in response to a growing US presence in the region. They adopted the slogan "God is great, death to America, death to Israel, curse the Jews, and victory for Islam," which is now on their flag. Starting in 2004, the Houthis led a rebellion against the government of Yemen. Saudi Arabia backed the government while rival Iran supported the Houthis. In 2014, the capital, Sanaa, and the main port of Hodeida fell to the Houthis. What's left of government forces are now centered in Aden, the former capital of South Yemen. The Houthis now act as the *de facto* government of Yemen.

Emboldened by their success against Saudi Arabia and inspired by ongoing Hamas and Hezbollah campaigns, the Houthis have chosen to enter the Israel-Hamas war. Initially and still ongoing are regular long-range missile and drone attacks aimed at Israel.

The Houthis added a maritime dimension to the hostilities by executing a series of raids composed of missile and UAV attacks on shipping, committing acts of piracy and hijacking, and taking hostages. The first incident occurred on November 19, when a Houthi assault team captured the M/V GALAXY LEADER. On December 3, three other commercial ships were attacked in the Red Sea at the Bab-al-Mandeb Strait. The intervention of an American warship, the USS CARNEY (DDG-64), mitigated what would have been a devastating missile and drone barrage. USCENTCOM characterized the attacks as "a direct threat to international commerce and maritime security."

Ninety percent of the world's commerce travels by sea. Today's global economy is interdependent and wholly reliant on the world's oceans and waterways. The Bab-

al-Mandeb Strait marks a critical location for maritime commerce. The strait is a maritime chokepoint between the Red Sea and the Gulf of Aden. This narrow pass is just beyond the southern terminus of the Suez Canal. In 2022, more than 23,000 ships (1.4 billion tons) passed through the canal, accounting for nearly 12% of all global maritime trade. In addition to serving Suez traffic, the Bab-el-Mandeb Strait is the only access point from the Indian Ocean to the Israeli port of Eilat; Aqaba, Jordan's only port; and Jeddah, Saudi Arabia's biggest port. The Houthi attacks have made the area hazardous for shipping, imperiling the use of the canal itself.

American sea power protects the "maritime global commons." The commons encompasses the high seas, which cover around 64% of the ocean's surface, and the seabed beyond national territorial waters. These areas are governed by international law, primarily the United Nations Convention on the Law of the Sea (UNCLOS), which establishes navigation, fishing, deep-sea mining, and environmental protection guidelines.

US Navy Warfare Publication 1-14M, the *Commander's Handbook on the Law of Naval Operations*, outlines the legal framework for US naval operations. The US Navy can (but is not obligated to) protect non-US flagged vessels. Section 3.10.2 states that "embodied in the concept of collective self-defense, [it] provides authority for the use of proportionate force necessary for the protection of foreign-flagged vessels and aircraft and foreign nationals and their property from unlawful violence – including terrorist or piratical attacks – at sea." Generally, the US would need approval from the flag country of the vessel in distress before acting. However, the US can act without the foreign state's permission if lives are in immediate danger.

On November 19, a Houthi assault team, arriving via helicopter, boarded the M/V GALAXY LEADER, a roll-on/roll-off vehicle (car) carrier transiting the Red Sea. The team seized control of the vessel and took the crew hostage. Subsequently, they commandeered the ship, rerouting it to Hodeida, where it remains detained. Its crew of 23, including mariners from Bulgaria, Ukraine, the Philippines, Mexico, and Romania, remain captive.

The Houthis claim that the vessel was hijacked because of ties to Israel. However, maritime business relationships can be complicated. GALAXY LEADER, for

example, is a Bahamian-flagged, multinational-crewed, British-operated, and Japanese-owned vessel with no apparent ties to Israel.

On December 3, three vessels—the Bahamian-flagged bulk carrier M/V UNITY EXPLORER, the container ship M/V NUMBER 9, and the Panamanian-flagged bulk carrier M/V AOM SOPHIE II—were targeted by the Houthis in a series of attacks. USCENTCOM reported that "at approximately 9:15 Sanaa time, the CARNEY detected an anti-ship ballistic missile attack fired from Houthi-controlled areas of Yemen toward the M/V UNITY EXPLORER, impacting in the vicinity of the vessel." This attack marks the first time a ballistic missile has been used in an attack against a ship. Most anti-ship missiles are cruise missiles that launch more horizontally and fly out at a low altitude, skimming along the water. A ballistic missile is launched high into the air; it then tips over and begins its descent while its seeker finds the target, placing the missile on a rapid trajectory towards it.

Near noon, the CARNEY shot down a drone headed in its direction, though it is unclear if the CARNEY was the intended target. At 12:35, another missile was fired at UNITY EXPLORER, and this time, it hit the vessel, causing minor damage. The ship made a distress call and CARNEY came to assist. While in the area, CARNEY engaged and destroyed another inbound UAV. At 15:30, the NUMBER 9 was struck by a missile. One hour later, the AOM SOPHIE II was also hit by a missile. The CARNEY, while transiting to assist, shot down one more Houthi UAV.

In a clear escalation, on December 10, the Houthis threatened to attack any vessel transiting to Israel from passing through the Red Sea. They said: "If food and medicine do not enter the Gaza Strip according to the requirements, we will attack every ship that passes through regardless of its nationality and origin." Subsequently, the Houthis targeted a French Navy ship, the FS LANGUEDOC, with two UAVs. This was the first time that a warship was unquestionably the target. The LANGUEDOC successfully intercepted the drones. Then, on December 11, the Houthis fired missiles into the M/T STRINDA, a chemical tanker, which caught on fire.

The UNITY EXPLORER is owned by a UK company called Unity Group. The CEO of Unity, Danny Unger, is Israeli. NUMBER 9 was once associated with the Israeli

company Zim Integrated Shipping Services (ZIM), but not at the time of the attack. Today, NUMBER 9 is owned by OOCL (Orient Overseas Container Line), which in turn is owned by parent company OOIL (Orient Overseas International Limited), a Hong Kong-based Chinese holding company. The STRINDA is Norwegian-flagged and owned by the Norwegian company Mowinckel Chemical Tankers. It is managed by Hansa Tankers of Bergen, Norway. It was scheduled to arrive at the port of Ashdod, Israel, on January 4. It's almost certain that the UNITY EXPLORER, NUMBER 9, and STRINDA were targeted because of Israel connections; however, the Houthis have now attacked several other vessels with no connection to Israel. The AOM SOPHIE II, for example, is Panamanian-flagged and Japanese-owned. As a French warship, the LANGUEDOC is naturally French-flagged, owned, and operated.

Suspiciously, the MV BEHSHAD was in the Red Sea near the vicinity of the attacks. The BEHSHAD is allegedly an Iranian spy ship that is suspected of playing a role in several maritime incidents in the Red Sea, particularly in assisting Houthi forces. The BEHSHAD has been positioned in the Red Sea since 2021, replacing a previous Iranian spy ship, the M/V SAVIZ. The BEHSHAD and the SAVIZ were reportedly converted cargo vessels used by Iran's Islamic Revolutionary Guard Corps Navy (IRGC-N) for intelligence collection.

These attacks are now occurring almost daily and have already had an economic impact. Three of the world's largest shipping companies, MAERSK, Hapag-Lloyd, and MSC Mediterranean Shipping, have announced they will reroute their vessels, adding one to two weeks to transit times. Marine insurance rates have risen in response to the threat, from a typical 0.04% of a vessel's total value to 1% or more. All of this adds to global shipping rates. Egypt's economy depends on revenue from canal operations and is losing millions of dollars a day as the crisis persists.

One positive development is that Israeli logistics company Trucknet has opened a pilot program moving trucks over 2,550 kilometers from Dubai, UAE, to Israel, crossing through Saudi Arabia and Jordan. This initiative provides an alternative to shipping and demonstrates the growing cooperation between Gulf countries and Israel even as the war continues to unfold.

The new maritime dimension to the Israel-Hamas War, launched by the Houthis, poses a direct challenge not only to regional stability but also to the fundamental principles of international maritime law and the security of global commerce. The strategic implications of the Houthis' actions, particularly in the critical Bab-el-Mandeb Strait, extend far beyond the immediate geopolitical theater, threatening the free flow of global maritime trade and, by extension, the interconnected global economy. The international community, led by the United States, must work collaboratively and expeditiously to ensure maritime security and deter future aggression.

For more information, see part two of this report on US Navy Operations and Options.

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