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December 2025





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December 2025

Cover photo: [Canva](#)

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Introduction

While attacks against commercial vessels have declined for the moment, the Houthi threat looks now potentially riskier than in 2023, when the crisis erupted. This is due to the Houthis' advanced weaponry and range, expanded geographical threat, and growing "beyond Iran" profit-oriented cooperation with armed and terrorist groups in the Red Sea and the Gulf of Aden. In this context, Saudi Arabia remains vulnerable to attacks on its territory and interests staged in/from the waterway: Riyadh still lacks a security strategy for the Red Sea, and a framework for multilateral security cooperation in the area. Given this background, Saudi Arabia and the GCC states share with the EU, European states, the UK (and the US) a rising strategic interest in tightening coordination and cooperation to identify, deter and possibly counter the Houthi threat. This policy brief outlines some responsive measures to be explored.

Threat assessment and new dynamics

Since the start of the Red Sea crisis in late 2023, Yemen's Houthis (who call themselves Ansar Allah) have diversified their arsenal, also including anti-ship ballistic missiles, and Water Borne Improvised Explosive Devices (WBIED, or "drone-boats").¹ Likewise, the Houthis have expanded the geographical threat to shipping beyond the epicentre of the Southern Red Sea. If we look at the attacks registered so far, the threat stretches now all the way from Yanbu, in the northern part of the Red Sea, to the Socotra archipelago in the Arabian Sea.

In 2025, the frequency of Houthis' attacks on shipping has reduced, even though lethality has increased.² The decrease in attacks can be explained by: the US and especially Israel's airstrikes in Houthi-controlled areas of Yemen;; the Israel-Hamas ceasefire in Gaza, signed in October 2025; and to a lesser extent, the presence of US-led and EU-led multinational naval defence missions in the Red Sea such as Operation Prosperity Guardian and EUNAVOR Aspides. Nevertheless, the Houthis' offensive capabilities improved in comparison to 2023, because of their access to a varied set of weapon systems, the range of their missiles and drones and the extension of the geographical threat. In 2024, sources of the US Department of Defence stated that Houthis' weapons could reach the Mediterranean.³

These developments build on the Houthis' diversification of alliances⁴, and especially to its growing cooperation with Somalia's al Shabaab, an al Qaeda affiliate, and Yemen's al Qaeda in the Arabian Peninsula (AQAP) in the Red Sea and the Gulf of Aden. According to UN experts, Houthi-Shabaab cooperation now involves "weapons smuggling, technical training", including "operational tactics, and exchange of logistical support".⁵ Since 2025, the Houthi-AQAP "opportunistic alliance"⁶ shows

¹ During the Red Sea crisis, the Houthis attacked for the first time with a WBIED in January 2024 Tara Copp, "Houthis Launch Sea Drone to Attack Ships Hours after US, Allies Issue Final Warning," AP News, January 5, 2024, <https://apnews.com/article/houthis-drone-ships-navy-missile-79aca676da82a61ce4a8151951727973>; However, the first ever use of a WBIED by the Houthis occurred in 2017 against a Saudi frigate off Hodeida: the attack killed two Saudi marines and three were injured "Saudi frigate comes under terrorist attack west of Hodeida by three Houthi suicide boats," Saudi Press Agency, January 30, 2017, <https://spa.gov.sa/>. Until the Yemen truce was agreed in April 2022, the Houthis performed many attacks against Saudi maritime and littoral targets with WBIEDs.

² Ramsey Al-Rikabi, "Houthis Are Using Weapons That Can Reach the Mediterranean Sea, US Says," *Bloomberg.Com*, May 22, 2024, <https://www.bloomberg.com/news/articles/2024-05-22/houthis-have-weapons-that-can-reach-mediterranean-us>.

³ Jared Szuba, "Yemen's Houthis Can Range Mediterranean Ships, Pentagon Says - AL-Monitor: The Middle East's Leading Independent News Source since 2012," AL-Monitor, May 22, 2024, <https://www.al-monitor.com/originals/2024/05/yemens-houthis-can-range-mediterranean-ships-pentagon-says>; Al-Rikabi, "Houthis Are Using Weapons That Can Reach the Mediterranean Sea, US Says."

⁴ Sary Mumayiz et al., *Update on Houthi Involvement in Iraq* | *The Washington Institute* (The Washington Institute for Near East Policy, 2025), <https://www.washingtoninstitute.org/policy-analysis/update-houthi-involvement-iraq>; Ruslan Suleymanov, "What Does Russia Seek to Gain From the Conflict in Yemen?," *Carnegie Politika*, June 3, 2025, <https://carnegieendowment.org/russia-eurasia/politika/2025/05/russia-interest-yemen-conflict?lang=en>.

⁵ Lipika Majumdar Roy Choudhury et al., "Final Report of the Panel of Experts on Yemen Establish," October 15, 2025, <https://docs.un.org/en/S/2025/650>.

⁶ Debi Prasad Dash et al., "Final Report of the Panel of Experts on Yemen Established Pursuant to Security Council Resolution 2140 (2014)," October 11, 2024, <https://documents.un.org/doc/undoc/gen/n24/259/53/pdf/n2425953.pdf>.

“increased collaboration,⁷ with the armed groups coordinating operations against the Yemeni government and allied forces, “directly with each other”.⁸ The Houthis agreed to transfer uncrewed aerial vehicles, thermal rockets and explosive devices, also providing training to AQAP. In this growing Red Sea network, the Houthis are the “main suppliers and in control of smuggling activities” with al Shabaab and AQAP, state UN experts.⁹

Since early 2025, rising ships interceptions by the Yemeni Coast Guard (YCG) off Yemen’s coasts highlight the role that maritime smuggling -of weapons, fuel and drugs- plays in financing Houthis’ survival and offensive activities. In such a context, growing armed group’s cooperation has two maritime security implications. The first is related to smuggling routes: weapons supplies to the Houthis -mainly of Iranian origin- increasingly pass through the Horn of Africa, including Somalia, defined as a “transit hub”.¹⁰ The second implication is the new risks arising from armed groups’ cooperation in the Red Sea: in the medium to long-term, Houthi-driven technical and knowledge transfer can lead to further maritime security risks enabling al Shabaab and AQAP’s upgraded capabilities.

⁷ Choudhury et al., “Final Report of the Panel of Experts on Yemen Establish.”

⁸ Dash et al., “Final Report of the Panel of Experts on Yemen Established Pursuant to Security Council Resolution 2140 (2014).”

⁹ Choudhury et al., “Final Report of the Panel of Experts on Yemen Establish.”

¹⁰ Eleonora Ardemagni, “Yemen: Counter-Smuggling Is Now Key to Tackling the Houthis,” *Italian Institute for International Political Studies*, November 20, 2025, <https://www.ispionline.it/en/publication/yemen-counter-smuggling-is-now-key-to-tackling-the-houthis-223187>. Choudhury et al., “Final Report of the Panel of Experts on Yemen Establish.”

Saudi Arabia in the Red Sea's theatre: interests and strategy

The Houthis have stopped attacks against Saudi territory and maritime targets since the Yemen truce was agreed on April 2022. Technically, the truce expired in October 2022, and wasn't further extended, although it continues to be widely observed by warring parties. Trying to prevent the return of Houthis' attacks on its territory, Saudi Arabia didn't join the multinational naval defence missions deployed in the Red Sea when the crisis erupted. From an economic and commercial perspective, Saudi Western ports have been significantly affected by the Red Sea crisis, because of shipping rerouting. For instance, traffic volumes at Jeddah port registered a -33% decrease in 2024, and King Abdullah Port a -82% contraction on the previous year.¹¹

In the Red Sea, Saudi Arabia is also potentially vulnerable regarding *Vision 2030's* projects on the Western coast, undersea cables, and oil export. This occurs as the Saudi Navy slowly undergoes a modernisation process for equipment and strategies, with technical education and training key to the development of autonomous naval capabilities.¹² The Saudi Vision cable, the first high-speed submarine cable in the Red Sea which connects Jeddah to NEOM, has become operational in 2024. The Yanbu oil terminal represents now the 12,2% of crude oil export in Jan-May 2025¹³: before the Red Sea crisis, the Red Sea waterway through the Bab el-Mandeb was perceived by the government as a reliable alternative route to Hormuz.

On the Red Sea, Riyadh hasn't elaborated a full security strategy, nor it has implemented an effective security cooperation framework for the region. Saudi Arabia has a vision for the Red Sea which is focused on economic prosperity, investments and infrastructure, while it still lacks a comprehensive, cross-regional security strategy able to tackle and mitigate the rising destabilisation of the broader Red Sea context.¹⁴ More broadly, the GCC states have proved unable to formulate a unified approach to the region so far, mainly due to different geographical positions, political agendas and intra-GCC competition, threat perceptions, as well as to the complicating effects of global powers' competition.¹⁵

The Saudi-led *Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden*, better known as *Red Sea Council*, is the only recent Riyadh's attempt to actively shape a Red Sea policy combining security and multilateral factors: but it hasn't achieved tangible outcomes, and the Council

¹¹ "Red Sea Rerouting Prompts Recalibration of Saudi Trade," Kuehne+Nagel, July 1, 2025, <https://mykn.kuehne-nagel.com/news/article/red-sea-rerouting-prompts-recalibration-of-sa-01-Jul-2025>.

¹² On the Saudi Navy, see Albert Vidal, "Shopping for Sea Power: Saudi Arabia's Naval Transformation," *Italian Institute for International Political Studies*, October 3, 2025, <https://www.ispionline.it/en/publication/shopping-for-sea-power-saudi-arabias-naval-transformation-217520>.

¹³ "Tankers: Saudi Arabia Crude Oil Exports Keep Declining," Hellenic Shipping News, June 14, 2025, <https://www.hellenicshippingnews.com/tankers-saudi-arabia-crude-oil-exports-keep-declining/>.

¹⁴ Eleonora rdemagni, "Saudi Arabia Has a Red Sea Vision, Not Yet a Strategy," *Arab Gulf States Institute*, May 17, 2024, <https://agsi.org/analysis/saudi-arabia-has-a-red-sea-vision-not-yet-a-strategy/>.

¹⁵ Eleonora Ardemagni, *The GCC States' Security Policies in the Red Sea Geopolitical Border: Factors and Policy Options* (Mediterranean Platform School of Government, 2025), <https://mp.luiss.it/archives/the-gcc-states-security-policies-in-the-red-sea-geopolitical-border-factors-and-policy-options/>.

hasn't been a player during the Houthi maritime crisis.¹⁶ The Red Sea Council, established in 2020, includes Saudi Arabia, Egypt, Jordan, Sudan, Eritrea, Yemen, Somalia and Djibouti.

In November 2025, major "Red Wave 8" multi-day drills were held in Saudi Arabia, under Saudi-Egyptian lead: the naval exercise, comprising training to counter fast-attack boats and artillery strikes on surface targets, "featured a comprehensive programme" to enhance "joint operational readiness and strengthen coordination among the participating navies".¹⁷ Nevertheless, only Jordan, Sudan, Yemen, and Djibouti joined the drills, while other Red Sea Council's members did not, marking the lack of a real multilateral security framework.

Recently, Riyadh has been working to strengthen naval cooperation with Egypt, as stressed by the Saudi-Egyptian protocol for regional maritime security signed in August 2025.¹⁸ This follows Egypt's decision to cede to Saudi Arabia the control over Tiran and Sanafir islands in the Gulf of Aqaba. The strengthening of the bilateral axis with Egypt, rather than of a multilateral framework, risks to further disempower the geopolitical and security meaning of the Red Sea Council, especially in absence of practical coordination between members on maritime and littoral security.

¹⁶ "The GCC States' Security Policies in the Red Sea Geopolitical Border: Factors and Policy Options," *Luiss Mediterranean Platform*, n.d., accessed December 19, 2025, <https://mp.luiss.it/archives/the-gcc-states-security-policies-in-the-red-sea-geopolitical-border-factors-and-policy-options/>.

¹⁷ Sarah Saad, "Egypt, Saudi Navies Successfully Conclude Red Wave 8 Drill," *Egypt, The Egyptian Gazette*, November 17, 2025, <https://egyptian-gazette.com/egypt/egypt-saudi-navies-successfully-conclude-red-wave-8-drill/>.

¹⁸ "Egypt-Saudi 'Red Wave 8' Naval Training Kicks off with Participation of Four Other Nations - Defence - Egypt," *Ahram Online*, November 11, 2025, <https://english.ahram.org.eg/News/556643.aspx>.

Responsive measures: exploring policy options for Gulf and European states' cooperation in the Red Sea

On Red Sea security, the GCC states, EU states, the EU and the UK share an interest in tightening coordination and cooperation to identify, deter and possibly counter threats coming from the Houthis and other armed groups. Convergence between Gulf and European players fits also into American interests: it can contribute to mitigate instability across a prominent trade and energy corridor while allowing the US to focus on other strategic theatres.

The time looks right to pursue this goal. The next Cypriot EU Presidency (starting from January 2026) is likely to devote special attention to security risks arising from the Red Sea, given its geographical location and trade vocation. 2026 will also mark the second EU-GCC Summit, scheduled for autumn in Riyadh, where maritime security will stand at the top of the cooperation priorities.

For this purpose, Gulf and European states should:

- Boost coordinated support for the YCG, along the lines of the framework of the Yemen Maritime Security Partnership launched by Saudi Arabia and the UK in September 2025. The YCG can play a stronger role intercepting weapons bound for the Houthis, and securing the Yemeni coast. A safer coastline would allow the government to restart oil export from southern ports, with positive effects on state revenues and salaries for public workers. The Red Sea crisis generated by the Houthis is rooted in the Yemen conflict: Gulf and European partners should never forget it, since supporting Yemen's institutions and security forces means contributing to weaken Houthis' offensive capabilities.
- Partner with Red Sea states to strengthen and equip their coast guards, enhancing patrolling, littoral security, and counter-smuggling capabilities. Institutional formats are already in place: the Saudi-led Red Sea Council should create training synergies such as information sharing, joint training and drills with European members of the Task Force 154 (maritime training) of the US-led Combined Maritime Forces to favour trust and capacity-building.
- Choose maritime security as top policy area of the EU-GCC Regional Security Dialogue. The Security Dialogue also covers, as cooperation areas, counterterrorism, organised crime and drug trafficking: dimensions that are all related to maritime security. Topics such as digital security and supply chains resilience are also related to maritime security: the Dialogue should include digital infrastructures (undersea cables) and mineral supply chains in the maritime security dimension, leveraging on rising GCC states' investments in the mining sector for the energy, digital and industry transition.
- Strengthen intelligence sharing in the Red Sea to support readiness vis-à-vis multifaceted threats. Intra-GCC sharing of information is still the first obstacle to broader and effective cooperation, but it would be key to bring Red Sea security to the next level.

- Explore the extension of existing agreements to other Gulf and European partners. The C-SIPA (the Comprehensive Security Integration and Prosperity Agreement) could be a model to enhance Saudi Arabia's cooperation with EU states building upon functioning agreements, towards a multilateral security framework. Signed by Bahrain and the US (2023), then joined by the UK (2025), the C-SIPA is centred on the defence integration concept and explicitly mentions the maritime domain.

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