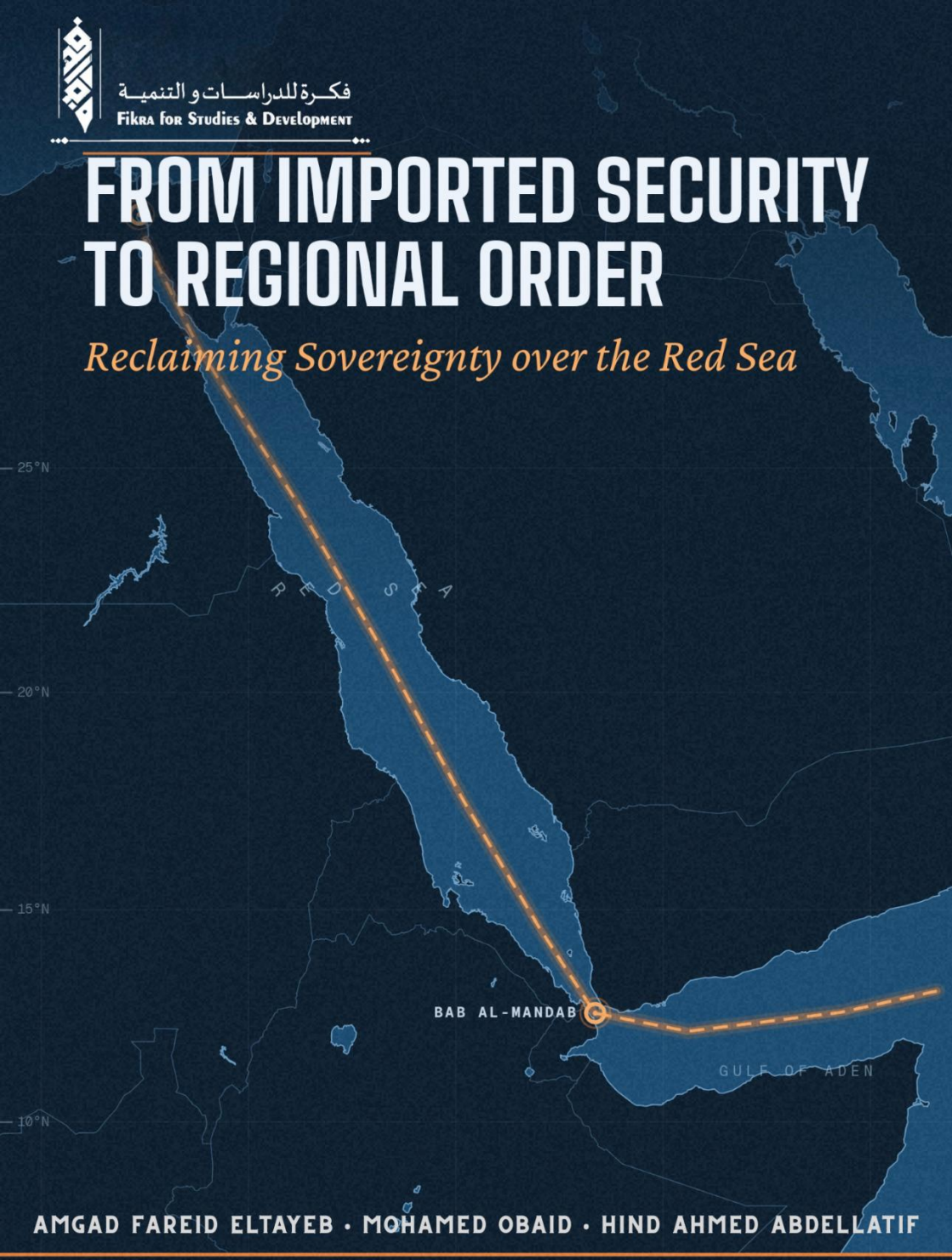
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Fikra for Studies & Development

FROM IMPORTED SECURITY TO REGIONAL ORDER

Reclaiming Sovereignty over the Red Sea



AMGAD FAREID ELTAYEB · MOHAMED OBAID · HIND AHMED ABDELLATIF

POLICY ANALYSIS REPORT

AUGUST 2026

From Imported Security to Regional Order: Reclaiming Sovereignty over the Red Sea

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1. The Riyadh Declaration

On 30 July 2026, Riyadh witnessed the signing of the declaration establishing a multinational maritime defence alliance.[1] The founding signatories included Saudi Arabia, Sudan, Egypt, Turkey, Pakistan, Jordan, Qatar, Kuwait, Bahrain, Yemen, Bangladesh, Nigeria, Djibouti and Somalia. Representatives from 43 of the 51 invited entities attended the meeting.[2] The founding states entrusted Saudi Arabia, in its capacity as the founding state, with the leadership of the alliance and designated it as the host of its Permanent Headquarters, Joint Command, Command and Control Centre, Joint Maritime Operations Centre, and General Secretariat.[3]

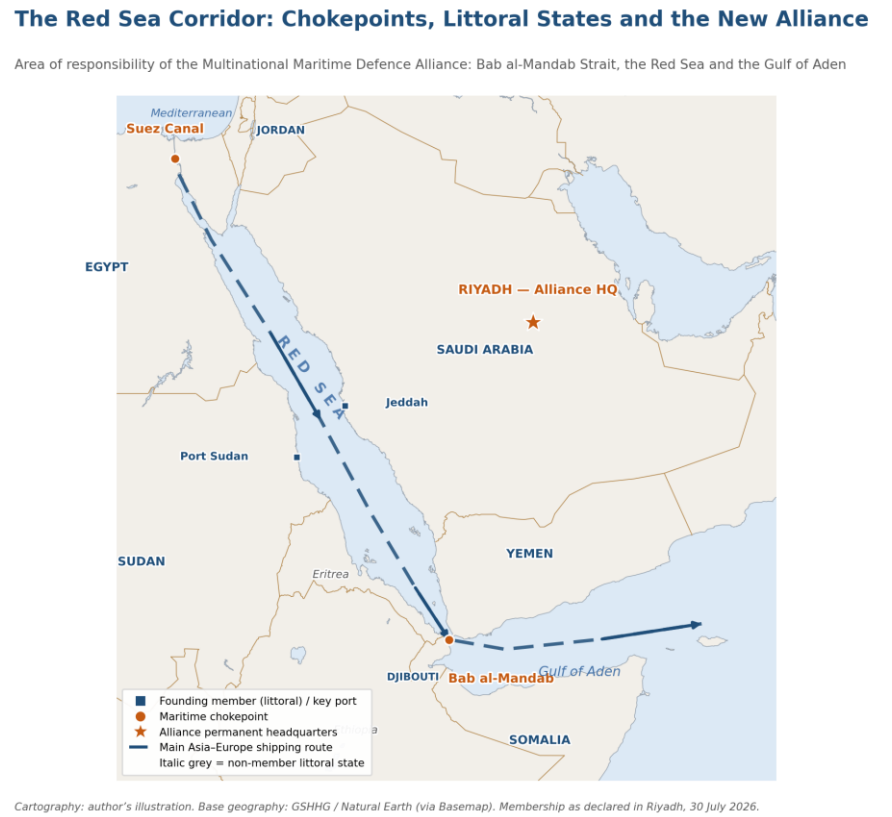
What distinguishes this declaration is its preemptive explicit blueprinting of the institutional architecture necessary for Red Sea engagement. A structural clarity that previous regional endeavors failed to establish.

This declaration may be read in the news pages as a military arrangement among neighbouring states. Yet its substance and timing far exceed that reading. It represents a belated, serious attempt to answer a question that has hung over the region for more than half a century: who holds the decision over a maritime corridor that carries roughly one-tenth of global seaborne trade and is traversed by tens of thousands of vessels each year?

[1]Saudi Press Agency, "Founding States Issue Joint Declaration on Establishing Multinational Maritime Defense Alliance", Riyadh, 30 July 2026, www.spa.gov.sa/en/N2644911.

[2]Qatar News Agency, "At Least 14 Countries Announce Establishment of Multinational Maritime Defense Alliance to Protect Maritime Security", 30 July 2026, qna.org.qa/en/News-Area/News/2026-7/30/at-least-14-countries-announce-establishment-of-multinational-maritime-defense-alliance-to-protect-maritime-security.

[3]Joint Statement of the Founding States on the establishment of the alliance, published by the Embassy of Saudi Arabia in Washington, 30 July 2026, x.com/SaudiEmbassyUSA/status/2082920631516230131.



Cartography: author's illustration. Base geography: GSHHG / Natural Earth (via Basemap). Membership as declared in Riyadh, 30 July 2026.

Figure 1. *The Red Sea corridor: chokepoints, littoral states and the alliance's area of responsibility.*

2. Half a Century of Incomplete Models

The answer has never been disputed in the lenses of law. What has been lacking is the political will and the capacity to enforce it. The idea of a collective regional security framework for the Red Sea is not new. It has occupied regional strategic thinking for decades, yet it has never crystallized into an institutional architecture capable of translating ambition into reality. In the 1970s the discourse of keeping the Red Sea a commercial and economic corridor free from the competition of major fleets prevailed. The

littoral states, Sudan foremost among them, moved toward understandings in that direction. Those understandings, however, failed to evolve into a practical arrangement after colliding with the rock of Cold War polarisation, the wars of the Horn of Africa, and the collapse of Somalia on the south-western shore of the corridor.

Regional Frameworks Without Executive Capacity

In 2009 the Djibouti Code of Conduct was signed, later expanded by the Jeddah Amendment of 2017 to encompass transnational maritime crime beyond piracy alone.[4] This produced a respectable legal framework, information-sharing mechanisms, and training programmes. Yet it failed to generate the operational capacity required to translate these into meaningful outcomes.

Then, on 6 January 2020, Riyadh hosted the signing of the Charter establishing the Council of Arab and African States Bordering the Red Sea and the Gulf of Aden, with membership of eight states: Saudi Arabia, Sudan, Egypt, Yemen, Eritrea, Somalia, Djibouti and Jordan.[5] That was a step in the right direction, yet it remained a weak coordination mechanism suspended in documents without an executive arm, without command and control arrangements, and without an operations centre.

External Frameworks Without Regional Ownership

In parallel, frameworks designed from outside the region accumulated: the European Operation Atalanta since 2008, Combined Task Force 153 since 2022, then the U.S. Operation Prosperity

[4]International Maritime Organization, "Djibouti Code of Conduct" (as expanded by the Jeddah Amendment, 2017), www.imo.org/en/ourwork/security/pages/dcoc.aspx.

[5]Arab News, "Saudi Arabia and 7 countries form council to secure Red Sea and Gulf of Aden", 6 January 2020, www.arabnews.com/node/1609121/saudi-arabia.

Guardian in December 2023, and most recently the European Operation Aspides launched in February 2024.[6]

For decades the Red Sea has oscillated between two models, both incomplete by design: a regional model content with signing agreements and declarations without living institutions capable of action, and an external model that produced institutions without regional ownership.

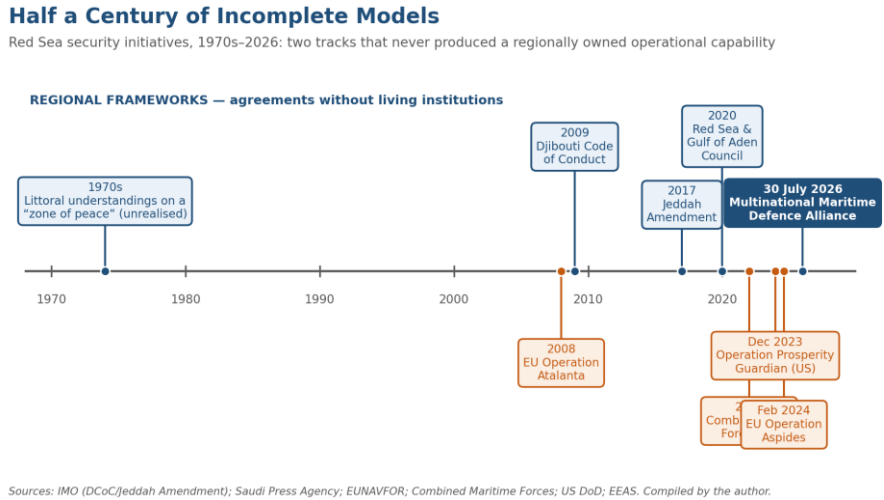


Figure 2. *Half a century of Red Sea security frameworks: regional agreements above the axis, external operations below it.*

3. The Cost of the Vacuum: What the Numbers Show

The cumulative result is not a matter of opinion, but numbers reflect it. Between November 2023 and September 2025 roughly

[6]EUNAVFOR, Operation Atalanta, eunavfor.eu; Combined Maritime Forces, Combined Task Force 153, combinedmaritimeforces.com; U.S. Department of Defense, statement announcing Operation Prosperity Guardian, 18 December 2023, www.defense.gov; European Union External Action, EUNAVFOR Aspides, www.eeas.europa.eu/eunavfor-aspides_en.

one hundred ships passing the red sea were attacked or hijacked.[7] Transit rates through the Suez Canal fell from 26,434 vessels in 2023 to 13,213 in 2024, a decline of nearly half. Canal revenues dropped from $10.3 billion to around $4 billion. The corridor's share of global maritime traffic declined from approximately 12% to under 9%.[8]

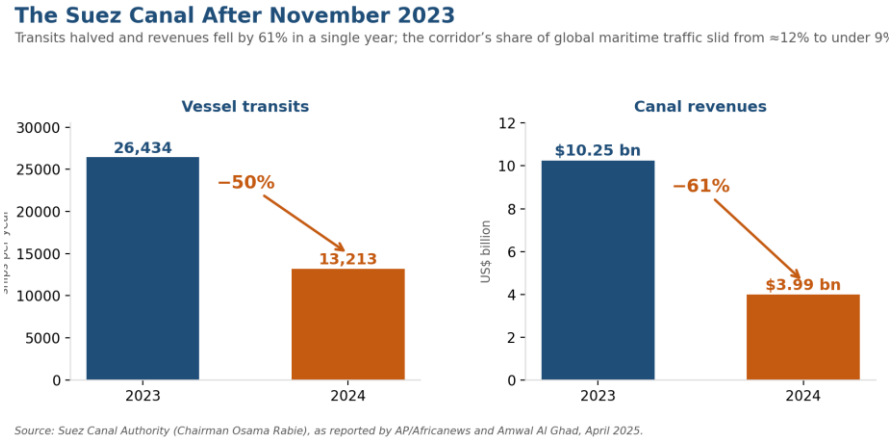


Figure 3. *Suez Canal transits and revenues, 2023–2024.*

The picture was harsher for oil. The average flow of oil through Bab al-Mandab in 2023 stood at about 9.3 million barrels per day (crude and petroleum liquids), that rate fell to 4.1 million barrels per day in 2024.[9] Global trade paid the bill twice: once through the longer route around the Cape of Good Hope, an increase of roughly 3,500 nautical miles, equivalent to ten to fourteen additional days

[7]Associated Press (via Africanews), "Egypt's revenue from the Suez Canal plunged sharply in 2024", 17 April 2025, www.africanews.com/2025/04/17/egypts-revenue-from-the-suez-canal-plunged-sharply-in-2024/; on the end of the attack sequence, see gCaptain, 7 January 2026 (note 12): the Minervagracht, struck on 29 September 2025, was the last vessel attacked before the lull.

[8]Suez Canal Authority figures, as reported by AP/Africanews (ibid.) and Amwal Al Ghad, "Suez Canal revenue hits $39.9 billion over 6 years, despite 2024 slowdown", 17 April 2025, en.amwalalghad.com/suez-canal-revenue-hits-39-9-billion-over-6-years/.

[9]U.S. Energy Information Administration, World Oil Transit Chokepoints, updated 3 March 2026 (Vortexa tanker-tracking data), www.eia.gov/international/content/analysis/special_topics/World_Oil_Transit_Chokepoints.

of voyage and about one million dollars in extra fuel,[10] and again through freight rates that multiplied sevenfold on the Shanghai–Rotterdam route between November 2023 and July 2024, remaining approximately 80% higher in 2025 than 2023 levels.[11]

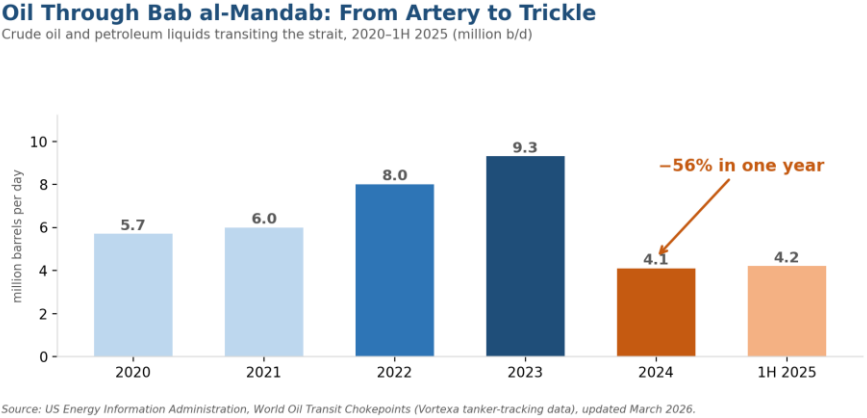


Figure 4. *Oil flows through the Bab al-Mandab Strait, 2020–first half of 2025.*

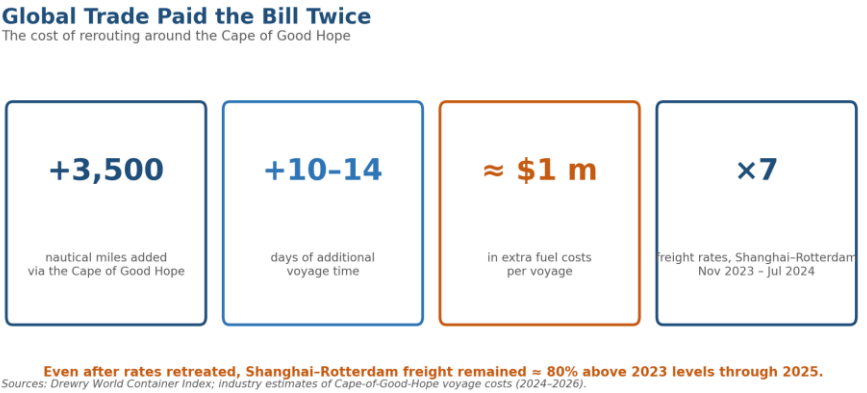


Figure 5. *The cost of diversion around the Cape of Good Hope.*

[10]See, e.g., The Middle East Insider, "Bab al-Mandeb: The Second Chokepoint That Could Shut Down Global Trade", 29 March 2026, themiddleeastinsider.com/2026/03/29/bab-al-mandeb-strait-houthi-global-trade-2026/.

[11]Drewry, World Container Index (Shanghai–Rotterdam assessments), www.drewry.co.uk/supply-chain-advisors/supply-chain-expertise/world-container-index-assessed-by-drewry.

The global business community takes fright quickly, yet recovers confidence far more slowly. Despite the cessation of attacks and a full hundred days without a single incident at the beginning of 2026, Suez Canal transit remained some 60% below pre-crisis levels, and quarterly cargo volumes stayed between 51% and 64% lower since January 2024. Even when the war-risk insurance premium declined to around 0.2 per cent of vessel value in December 2025, which is the lowest level since the recent Red Sea crisis began, shipping lines through the Red Sea had still not recovered and returned to normal.[12]

The Collapse of Confidence

Here lies the lesson that must not pass unnoticed: foreign fleets may have intercepted the missiles, but they could not bring the ships back. They failed to restore freedom of navigation in any meaningful sense. What collapsed was not air defence. What collapsed was confidence. Maritime commerce depends not only on physical protection but on the expectation of predictable security. That expectation cannot be sustained by military presence alone. It rests on the conviction that those who live along the shores exercise enduring responsibility for the waterway, and that its security is not hostage to the shifting strategic priorities of distant powers or the cycles of their domestic politics. Protection imported from abroad is, by its nature, temporary.

[12]BIMCO analysis, as reported by gCaptain, "Suez Canal Traffic Stalls at 60% Below Normal Despite 100 Days Without Houthi Attacks", 7 January 2026, gcaptain.com/suez-canal-traffic-stalls-at-60-below-normal-despite-100-days-without-houthi-attacks/.



Figure 6. *Security restored, confidence withheld: the recovery gap at the beginning of 2026.*

4. Why This Alliance Is Different

An Integrated Institutional Architecture

Why, then, is this alliance different now? The difference lies in structure, not merely in political discourse. The declaration does not stop at a framework for cooperation; it lays the foundations of an integrated organisational architecture that includes a reference charter, an administrative structure, command-and-control arrangements, executive mechanisms, a permanent headquarters, a general secretariat and a joint maritime operations centre. These elements are not the conventional features of a contingent alliance or a fleeting political statement. They constitute essential institutional characteristics that transform coordination among states from temporary understandings into a permanent framework possessing the capacity to plan, decide and execute a collective response.

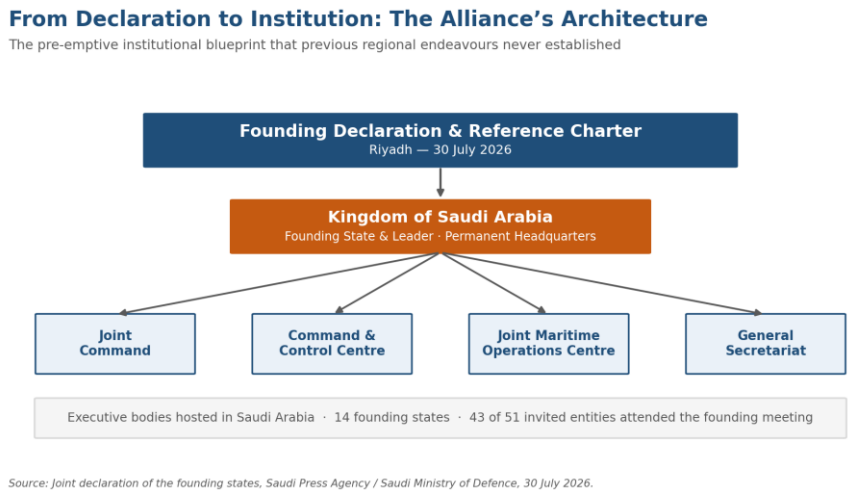


Figure 7. *The institutional architecture established by the founding declaration.*

The Leading State

The second difference concerns the identity of the leading state, and it is more consequential than it may first appear. Saudi Arabia's GDP reached approximately US$1.275 trillion in 2025, growing by 4.5% in real terms, making it the largest Arab economy, a G20 member, and the world's largest oil exporter.[13] Yet the more significant fact is not economic but strategic. The Kingdom's Red Sea coastline has ceased to be a peripheral frontier; under Vision 2030, it has become the geographic centrepiece of its national development strategy. Flagship initiatives such as NEOM and the Red Sea Project have transformed the Kingdom's western seaboard into a core economic asset, underpinning a broader transition in which the non-oil economy is projected to account for more than

[13]General Authority for Statistics (GASTAT), 2025 GDP estimates, via Saudi Press Agency, 9 March 2026, www.spa.gov.sa/en/N2532192; Arabian Business, "Saudi Arabia GDP rises 4.5 per cent in 2025 to $1.28tn", www.arabianbusiness.com/finance/economy/saudi-arabia-gdp-rises-4-5-per-cent-in-2025-to-1-28tn.

55% of GDP.[14] Saudi Arabia's leadership of the alliance therefore provides a strong structural foundation for its durability. Riyadh is sponsoring this initiative not merely out of regional solidarity, but because it has a direct strategic stake in safeguarding the viability of its long-term investments along the Red Sea coast. That convergence of national development and regional security creates incentives likely to prove more enduring than alliances sustained primarily by political goodwill or shared declarations of intent.

The Breadth of Membership

The third difference lies in the breadth of membership beyond the Red Sea basin. The presence of Turkey, Pakistan, Bangladesh and Nigeria is not symbolic solidarity; it reflects that the framework rests not solely on geographic proximity but on states with a stake in the safety of the corridor—exporting states, importing states, and states possessing naval capabilities capable of genuine contribution.

[14]AGBI, "Saudi Arabia ups 2025 GDP growth estimate to 4.5%", 2 February 2026, www.agbi.com/economy/2026/02/saudi-arabia-ups-2025-gdp-growth-estimate-to-4-5/.

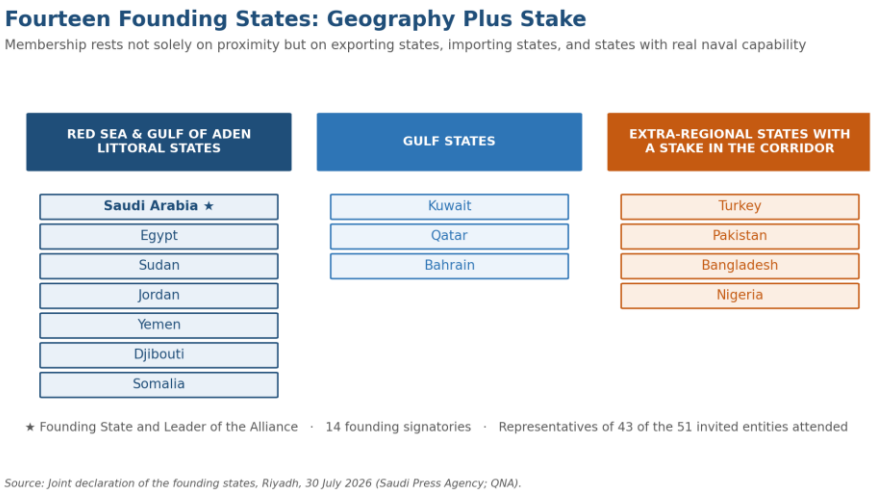


Figure 8. *The fourteen founding states, grouped by relationship to the corridor.*

5. From Opportunity to Institution: The Challenges Ahead

All of the above describes the opportunity. Yet opportunity alone, however great, is no guarantee. It is an insult to political reason to celebrate a declaration before asking about the conditions of its transformation into reality. A number of challenges may obstruct the translation of this alliance into its full potential.

Military Doctrine and Interoperability

First, military doctrine. The founding states do not share a common naval doctrine. Turkey operates within NATO doctrine and interoperability standards; Pakistan draws on its Indian Ocean experience, including leadership of multinational maritime task forces; Egypt commands the Arab world's largest navy, with a doctrine centred on securing the Suez Canal and its maritime approaches; Saudi Arabia is building a modern naval force around

advanced Western-sourced platforms; while the remaining navies range from limited coastal defence capabilities to little or no meaningful naval capacity. Interoperability is not a slogan; it requires compatible tactical data links, common operating procedures, shared communications protocols, and integrated training and exercises. Developing these capabilities can take years even within long-established alliances.

Divergent Political Priorities

Next comes the divergence of political priorities. Each member of the alliance defines the principal threats differently. One may view any disruption to canal traffic as the overriding concern; another may prioritise the security of its coastline and strategic development projects; a third may focus on piracy, illegal fishing and maritime law enforcement; a fourth may see external encroachment on its sovereignty as the primary challenge. When threat perceptions diverge, so too do operational priorities. Without a shared strategic framework, the joint operations centre risks becoming less a command centre than a coordination forum for procedural consensus.

Financing and Institutional Ownership

Financing presents a similar challenge. It is not merely an accounting issue but a question of institutional ownership. A permanent headquarters, joint command, command-and-control centre, maritime operations centre and general secretariat require sustained financial commitments rather than periodic political declarations. The alliance will therefore need a transparent burden-sharing formula with clearly defined national contributions. Otherwise, if one state assumes a disproportionate share of the financial burden,

the formal principle of equality enshrined in the charter may gradually give way to informal political asymmetry. In institutional practice, financial predominance almost invariably translates into greater influence over strategic decision-making.

Relations with the Existing Security Architecture

The next challenge concerns the alliance's relationship with the existing security architecture. The region is far from an institutional vacuum. The US Fifth Fleet maintains a permanent presence, while Combined Task Force 153 operates under the Combined Maritime Forces across the Red Sea, Bab al-Mandab and the Gulf of Aden, with several founding members of the new alliance already participating in that framework. Alongside them, the European Union's Operation Aspides continues to conduct limited defensive missions to protect commercial navigation. The central question, therefore, is not whether another maritime alliance has emerged, but what strategic function it is intended to perform within this already crowded security landscape. Does it represent an implicit acknowledgement of the limitations of the existing security arrangements? Is it intended to complement them through a redistribution of roles? Will it operate as a parallel security framework? Or does it mark the beginning of a gradual transition from externally provided maritime security to a regionally led security order?

Perhaps the ambiguity is intentional at this stage—an act of founding intelligence that allows member states to join the alliance without being forced to make a strategic choice at an early stage. Yet ambiguity has a shelf life; it cannot remain forever a curtain over these questions and a barrier against their answers.

6. Four Operational Questions

At the operational level, four questions remain both fundamental and urgent. First, is the alliance's mandate confined to collective defence and the protection of maritime navigation, or does it extend to proactive interdiction operations, including the disruption of arms-smuggling networks, a matter of direct relevance to Sudan's national security?

Second, will it operate under a common set of written rules of engagement governing the use of force, or will operational decisions remain subject to the national discretion of each participating state?

Third, will member states assign permanently designated naval assets to operate under the alliance's command, or will it rely on ad hoc national contributions, leaving decisions on deployment and withdrawal in the hands of individual capitals?

Fourth, will it maintain a continuous operational presence at sea, or function as a mechanism activated only in times of crisis?

The final question is the most consequential because it determines whether the alliance constitutes a genuine deterrent or merely a crisis-response mechanism. Deterrence does not derive from the ability to mobilise after a threat has materialised; it rests on the continuous presence of a credible force capable of imposing costs before aggression occurs. A force that sails only after a crisis has begun is managing its consequences rather than preventing its emergence.

These are not questions of scepticism but of institutional design. The distinction between a durable security alliance and a declaratory political initiative will be determined by its ability to answer

them over the next eighteen months. Will it establish a permanent naval force with assigned assets? Will it adopt common rules of engagement? Will it approve a sustainable burden-sharing formula? Will it define a clear relationship with the existing security architecture? Will it conduct regular joint exercises that genuinely test interoperability? These are the benchmarks by which the alliance should be judged. Everything else is optics.

7. The Yemeni Test

The Yemeni file remains the most sensitive test of this alliance's birth. Attacks on navigation ceased in late 2025 under conditional understandings, while the source of the threat that necessitated the creation of this security framework was concentrated on Yemen's western coast. The question, therefore, is not about Yemen itself, but about the nature of the operational doctrine the alliance will adopt. Will it be a deterrent system capable of dealing with the source of the threat, with the possible consequence of reintroducing the Yemeni file into the regional security equation after years of Saudi efforts to contain it? Or will its role be limited to securing shipping lanes and containing the repercussions without addressing the source of danger—achieving temporary stability at the expense of long-term deterrent strength?

There appears little room for a middle path between these two trajectories; the choice between them will determine the alliance's identity and strategic function. That choice will not be settled by political statements; it will appear in its institutional design, the limits of its mandate, its rules of engagement, and the nature of the missions it is tasked to execute.

8. Who Owns the Red Sea?

The Red Sea will not remain a vacuum. Any prolonged security vacuum in geostrategically important locations attracts alternative arrangements, whether regional or external.

This vacuum will be filled by one of two things, and no third: either a collective arrangement created, owned and managed by the states of the region, sharing its cost, responsibility and decision on the basis of equality and common responsibility; or scattered bilateral arrangements that facilitate external interventions, mortgage the coasts and the national decision behind them, and exact their cost as a deduction from sovereignty and the future. In today's world the question is no longer who guards the Red Sea, but who owns it. If this alliance succeeds in transforming Red Sea security from a function performed by external powers into tasks undertaken by its own states, it will not merely found a new maritime alliance; it will inaugurate a new phase in the history of the region. If it falters, it will open the door to arrangements fashioned by others and managed according to their priorities, not according to the interests of the peoples and states of the Red Sea.

The Road Ahead: Benchmarks for the Next Eighteen Months

What is required now is specific, measurable institutional progress. As the leading state, Saudi Arabia will need to move the alliance from a signed charter to an operational institution. The first indicators should include the establishment of a permanent naval force with assigned assets and the adoption of a transparent burden-sharing formula that preserves the principle of equality before financial asymmetries begin to reshape decision-making. The

founding states, collectively, will need to adopt common rules of engagement, define a clear relationship with the existing security architecture to avoid duplication and ambiguity, and integrate the Council of Arab and African States Bordering the Red Sea and the Gulf of Aden into the emerging structure rather than leave it as a parallel institution with limited practical relevance. For Sudan, the priorities are equally clear: ensuring that arms-smuggling interdiction forms part of the alliance's operational mandate and linking Port Sudan to the joint early-warning and maritime surveillance system.

The next eighteen months will provide the first meaningful test of whether this initiative is becoming an institution or remaining a declaration. If these elements are translated into operational reality, the alliance may begin to mark a genuine transition from externally provided maritime security to a regionally led security order. If they are not, it will join the long list of ambitious regional initiatives whose political aspirations were never matched by institutional capacity.

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