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How Renewed Red Sea Insecurity Is Reshaping Regional Alignments

Maritime disruption is linking Gulf deterrence, Horn of Africa access, energy infrastructure, and regional defense cooperation in a layered strategic field.

The February 2026 US-Israel escalation against Iran, Iranian strikes on Gulf states, Hormuz disruption, and doubts about US security guarantees intensified regional security diversification. Renewed Houthi pressure on Saudi maritime commerce extended these pressures into the Red Sea. The emerging Red Sea order is a layered field of partially connected security arrangements. Its participants cooperate around particular routes and risks while retaining different alliances, threat perceptions, commercial interests, and rules governing the use of force.

From regional war to Red Sea pressure

The principal causal turning point came on February 28, 2026, when the United States and Israel attacked Iran and the confrontation widened across the Gulf. Iran then struck Gulf states that had neither initiated nor endorsed the war. Reuters reported resentment among regional sources over the resulting security and economic costs, while analysts described a reassessment of dependence on Washington [Reuters, 2026j]. This evidence documents a regional debate over the limits of US guarantees. It does not establish their formal abandonment.

Iranian strikes and Hormuz disruption changed the basis of Gulf security planning. Strikes on energy infrastructure raised air-defense demands, while shipping disruption increased the value of routes outside Hormuz. Israel's direct role widened uncertainty about escalation control. These mechanisms made diversification more attractive, although the evidence establishes reassessment rather than completed realignment [Reuters, 2026j].

The Gaza war remains an important antecedent. From late 2023, Yemen's Houthi movement attacked commercial vessels it described as linked to Israel and later to the United States and the United Kingdom. The attacks prompted rerouting around the Cape of Good Hope and higher insurance costs. Naval deployments followed, while Suez Canal traffic fell sharply [Reuters, 2026a; IMF, 2025; Council of the EU, 2026]. The public justification of those attacks centered on Gaza. By mid-2026, however, their strategic setting and effects had changed. Houthi maritime coercion operated within the wider Iran-centered regional war and directly pressured Saudi energy infrastructure and export routes.

On July 20, the Houthis declared what they called a maritime blockade of Saudi Arabia and warned shipping companies against using Saudi ports [Reuters, 2026a]. Reuters subsequently reported that several tankers loaded at Yanbu changed course toward Suez or held their positions, providing evidence of a commercial response before the blockade's enforcement could be assessed [Reuters, 2026b]. The August 11 attack on the Egyptian-owned *Tihamah* near Bab el-Mandeb, which killed four crew members and two Yemeni rescuers, demonstrated lethal Houthi reach near the strait [Reuters, 2026g].

These events establish coercive reach rather than Houthi control of the southern Red Sea. Attacks near Bab el-Mandeb and targeting uncertainty can raise transit costs without continuous enforcement. Firms can respond through delays, course changes, or insurance; naval protection can moderate risk. The evidenced outcome is influence over route choice rather than corridor control.

One export network, multiple chokepoints

Hormuz, the East-West pipeline and Yanbu, and the Red Sea corridor form a network because disruption at one segment changes traffic and exposure at another. Hormuz disruption can increase pipeline and Yanbu use, while Bab el-Mandeb insecurity can reduce that substitution's value for Asia-bound cargo. Firms translate these connections into costs, and authorities shape routes through infrastructure, jurisdiction, and maritime security. This interdependence does not imply mechanical integration.

The Saudi East-West pipeline carries crude from Abqaiq near the Persian Gulf to Yanbu on the Red Sea. The US Energy Information Administration identifies an operating capacity of five million barrels per day and reports that Aramco temporarily expanded the pipeline to seven million barrels per day in 2019. Saudi Arabia increased its use during the 2024 disruption around Bab el-Mandeb. During 2024 and the first quarter of 2025, flows through Hormuz still equaled about one-fifth of global oil and petroleum-product consumption [US EIA, 2025].

The pipeline reduces dependence on Hormuz, although it redistributes part of the exposure toward Red Sea routes and terminals. Cargo loaded at Yanbu for Europe can move north through Suez; cargo bound for Asia generally moves south through Bab el-Mandeb. Persian Gulf cargo that remains able to exit Hormuz can avoid the Red Sea by taking the longer Cape route. Nameplate capacity must also be separated from usable capacity, which depends on current throughput, terminal constraints, and tanker availability.

The UAE and Qatar occupy different positions within the same energy geography. The UAE's 1.8-million-barrel-per-day pipeline to Fujairah allowed some crude exports to continue at reduced levels during the effective closure of Hormuz in 2026; a second 1.5-million-barrel-per-day bypass is expected in 2027 [US EIA, 2026]. Qatar lacks a comparable export bypass for liquefied natural gas from Ras Laffan. In 2024, Qatar exported about 9.3 billion cubic feet per day of LNG through Hormuz and supplied most of the roughly one-fifth of global LNG trade that used the strait [US EIA, 2025b]. This asymmetry gives the UAE partial export resilience and leaves Qatar more exposed to navigation disruption. It helps explain different risk-management incentives; infrastructure alone does not determine alignment.

Egypt's exposure combines transit revenue and energy infrastructure. An International Monetary Fund assessment found that Red Sea disruption reduced Egypt's Suez Canal foreign-exchange inflows by about $6 billion in 2024, while transit trade remained around one-third of its pre-conflict level [IMF, 2025]. SUMED transports crude north from the Gulf of Suez to the Mediterranean, giving Egypt a separate energy-transfer role [US EIA, 2023]. Egypt seeks reliable transit flows, Saudi Arabia seeks export flexibility, and shipping firms compare route costs. These interests converge around navigation, although burdens and preferred responses can differ.

Saudi Arabia builds differentiated security relationships

Hormuz disruption increased the strategic importance of the East-West pipeline and Yanbu by shifting part of Saudi export exposure toward Red Sea navigation. Houthi pressure could then impose costs on the alternative route. This mechanism helps explain Riyadh's effort to institutionalize maritime cooperation. On July 30, Saudi Arabia hosted representatives from 43 countries and the European Union. Fourteen supported its proposed maritime defense coalition, including Egypt, Somalia, and Djibouti. Riyadh proposed leading the framework and hosting a joint operations center for information sharing, planning, and coordinated operations [Reuters, 2026d].

Eight days later, after nearly three years of prior negotiations, Saudi Arabia, Turkey, and Pakistan signed the Mecca Joint Defence Agreement. The pact declares that an armed attack on one member will be treated as an attack on all three. Turkish Foreign Minister Hakan Fidan compared its mutual-defense principle to NATO's Article 5. The agreement establishes a ministerial committee and a Saudi-based secretariat. Specific force commitments and operational procedures remained subject to later decisions [Reuters, 2026e; Reuters, 2026f]. Red Sea insecurity therefore accelerated and tested a diversification process rooted in older bilateral defense relationships.

Participants brought different resources. Turkey offered NATO experience and a defense-industrial relationship with Saudi Arabia; Pakistan brought longstanding defense ties with Riyadh; Egypt connected naval capacity to exposure at Suez [Reuters, 2026d; Reuters, 2026e; Reuters, 2026f]. These differences shaped credible contributions. Israel remained outside both arrangements, although its operations against Iran helped create the threat environment to which participants responded [Reuters, 2026j].

An older institutional field, newly recomposed

The 2026 initiatives entered a layered maritime-security field. Operation ATALANTA began in 2008, and the 2009 Djibouti Code established cooperation against piracy. The 2017 Jeddah Amendment broadened cooperation to transnational crime and maritime terrorism [Council of the EU, 2026b; IMO, 2017]. The Red Sea Council followed in 2020 and CTF 153 in 2022. Prosperity Guardian and ASPIDES responded to Houthi attacks from late 2023 [SPA, 2020; CMF, 2022; US Department of Defense, 2023; Council of the EU, 2026]. These arrangements differ in authority, command, and mission. They supplied institutional precedents while leaving gaps in collective defense and cross-route coordination that the 2026 proposals sought to address.

Arrangement	Institutional form	Documented contribution or status	Institutional limit or uncertainty
CTF 153 and Prosperity Guardian	CMF task force and nested defensive coalition	Red Sea security, capacity building, and defensive shipping protection	Voluntary national contributions; no collective-defense trigger
ASPIDES	Autonomous EU defensive naval operation	Defined EU command and vessel-protection mandate through February 2027	Separate political control and a defensive mandate
Saudi maritime proposal	Proposed Saudi-led multilateral framework	Fourteen-state endorsement and proposed joint operations center	Assigned forces, command procedures, and legal authority remain incomplete
Mecca agreement	Trilateral defense pact	Declared collective-defense commitment and permanent institutions	Specific force obligations and operational procedures remain undefined

What counts as alignment?

Alignment refers here to observable commitments, differentiated by institutional depth and accepted costs. The four forms below can coexist; evidence for one does not establish the others.

Form	Evidentiary threshold	Current illustration and limit
Diplomatic support	Official endorsement or consultation	Fourteen-state endorsement; no operational commitment shown
Functional cooperation	Information sharing, access, or coordinated planning	Existing missions demonstrate these functions; the Saudi center remains proposed
Operational integration	Assigned forces, defined command, and interoperable procedures	CTF 153 and ASPIDES integrate forces within separate commands; the Saudi proposal does not yet
Collective defense	Agreed trigger, decision process, and credible assistance obligation	The Mecca agreement states a trigger and creates a committee; force obligations remain undefined

Participation establishes only the form supported by evidence. Diplomatic endorsement may coexist with weak operational commitment, while a mission may integrate forces without creating collective-defense obligations. Deterrent value depends on the commitments and procedures available in a crisis, especially when assistance is requested and participants must accept costs.

The Horn is an arena of authority and bargaining

Horn of Africa states contribute authority as well as geography. Djibouti offers ports, surveillance access, and jurisdiction in territory hosting foreign military facilities. Somalia contributes internationally recognized sovereignty along its Gulf of Aden coastline, although federal reach remains uneven. In January 2026, Somalia's Council of Ministers announced the annulment of UAE port and security agreements. Puntland, Jubbaland, and authorities in the northwestern part of Somalia, commonly called Somaliland, rejected the decision and asserted that their agreements remained operative [Reuters, 2026h; Reuters, 2026i]. The episode shows Somali actors contesting who may authorize access through legal claims and external partnerships.

The northwestern part of Somalia, commonly called Somaliland, also enters this strategic field through the port of Berbera and its location near Bab el-Mandeb. Its authorities exercise substantial local administrative control. Israel's December 2025 decision to recognize the territory as a sovereign state remained exceptional; Somalia and the African Union rejected it [Reuters, 2025]. The recognition did not settle the territory's contested international status. External engagement with Berbera therefore connects commercial access and possible security cooperation to continuing disputes over Somalia's sovereignty and federal political order.

These actors possess unequal capabilities and pursue different returns. Some seek security assistance or infrastructure finance; others seek diplomatic leverage. Sudan's endorsement cannot be treated as equivalent to Egypt's naval capacity or Djibouti's authority over basing access [Reuters, 2026d]. Analysis should therefore identify the specific resource an actor can authorize, provide, or credibly sustain.

Corridor governance is layered. Governments hold juridical authority, naval coalitions operational capacity, and commercial actors control access and price risk. The Houthis exercise coercive reach. A declaration, a lawful blockade, and a behavior-changing threat are distinct. Blockade law requires declaration, effectiveness, and impartial application [ICRC, 2026].

Selective alignment and the test of implementation

Oman and the United Arab Emirates were absent from the Gulf states supporting the July 30 maritime statement. Their absence proves neither opposition nor a shared motive and means the Saudi initiative was not a settled Gulf Cooperation Council position. Oman maintained mediation practices; the UAE operated its own port and security network and diverged from Riyadh in Yemen. These contexts generate hypotheses, while direct evidence of the July decision remains necessary [Reuters, 2026d; Reuters, 2026k].

The UAE's networked maritime strategy

The UAE exercises networked maritime power through energy, ports, and security relationships. DP World operates Berbera in the northwestern part of Somalia, commonly called Somaliland, and Bosaso in Puntland. Berbera connects UAE logistics to Ethiopia and Red Sea shipping [DP World, 2022; DP World, 2026]. Emirati relationships with southern Yemeni actors extend influence across the opposite shore; influence remains distinct from operational command [Reuters, 2026k].

Commercial concessions illustrate infrastructural statecraft by creating durable relationships without conferring military command or sovereign jurisdiction. In the cases reviewed here, Saudi Arabia emphasized declarations and formal coalition leadership, while UAE influence operated more through bilateral relationships and strategic infrastructure. These tendencies overlap; coordination and competition coexist. UAE absence from the July statement demonstrates selective participation, while its motive remains unproven.

Qatar illustrates multi-track alignment. It supported the proposed Saudi maritime framework while retaining a diplomatic role in US-Iran negotiations. Doha and Islamabad mediated the June 2026 talks, and Qatar supported an agreement addressing de-escalation and freedom of navigation in Hormuz [Qatar Ministry of Foreign Affairs, 2026]. Its LNG exposure creates a material interest in navigation, while US security ties and diplomatic channels to Iran place it in separate relationships [US EIA, 2025b]. Limited commitments across these arenas indicate an effort to preserve diplomatic autonomy.

China represents a reported bilateral-access practice. Reuters reported on July 28 that Beijing had held direct talks with the Houthis to seek safe passage for Chinese tankers leaving Saudi ports. Chinese officials did not confirm the talks; the Foreign Ministry called for dialogue, de-escalation, and shipping protection [Reuters, 2026c]. If verified, the contacts would show risk management through bilateral accommodation outside coalition membership.

Europe operates in the same waters through separate political and command structures. The European Union has extended Operation ASPIDES until February 28, 2027. Its defensive mandate covers vessel protection and freedom of navigation [Council of the EU, 2026]. European deployments coexist with US-led and Saudi-proposed arrangements without shared political authority or unified command.

Implementation tests

Implementation will determine whether the new arrangements acquire authority. Three tests matter: assignment of forces and command; adoption of intelligence and interception procedures; and allocation of accountability and costs.

Performance on these tests will show whether declarations produce usable collective capacity.

The emerging Red Sea order is a layered field of partially connected security arrangements. Its participants cooperate around particular routes and risks while retaining different alliances, threat perceptions, commercial interests, and rules governing the use of force. Durability remains an open question. It requires credible operational cooperation, cost-sharing, and accountable procedures.

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Revision statement

This edition revises the causal framing, distinguishes levels of alignment, clarifies the directionality of energy routes, develops the UAE as a case of networked maritime power, adds the political agency of Horn of Africa actors, and situates the 2026 arrangements within the longer history of Red Sea maritime institutions. Information is current through August 11, 2026.

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