

Charting Future Horizons amid Regional Crises: Saudi Arabia's Strategic Thinking and Maritime Policy

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Abstract

This article critically analyzes Saudi Arabia's evolving strategic thinking and maritime policy in the context of persistent regional crises and shifting global dynamics. Moving beyond descriptive accounts, the study investigates how the Kingdom's ambitious Vision 2030 can be reconciled with the acute security threats proliferating in its neighboring waters. It evaluates the critical role of Saudi Arabia's geographic location, at the nexus of major global maritime routes, in shaping its aspirations to become a regional logistics hub, while also addressing the vulnerabilities exposed by ongoing instability. By applying SWOT framework, this study assesses the impact of recent policy shifts and identifies strategic opportunities and challenges facing the Kingdom. The findings indicate that by accelerating the implementation of an integrated National Maritime Policy, strengthening multilateral and regional maritime security cooperation, prioritizing the sustainability of the blue economy and the expansion of protected areas, enhancing technological development and workforce localization within the maritime sector, and diversifying partnerships along with improving infrastructure resilience, Saudi Arabia's maritime strategy can explore new opportunities amidst uncertainty and transformation.

Keywords: Saudi Arabia, Maritime Policy, Strategic Thinking, Vision 2030, SWOT

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Introduction

The Persian Gulf region is currently at a significant juncture as countries including Saudi Arabia, Oman, and Qatar implement comprehensive national development strategies—Saudi Arabia’s Vision 2030, Oman’s Vision 2040, and Qatar’s National Vision 2030. Although these nations share common objectives, such as economic diversification, human capital development, and governance reform, their approaches differ, reflecting distinct political structures, cultural contexts, and social dynamics. Saudi Arabia pursues ambitious and rapid reforms through transformative projects within its monarchical framework, whereas Oman emphasizes gradual institutional development and the preservation of its cultural heritage. In contrast, Qatar leverages its substantial natural gas reserves to promote economic growth and expand its global influence while managing a diverse expatriate population and striving to become a knowledge-based economy (Sheline & Ulrichsen, 2025). These differing approaches shape patterns of social integration, levels of civic participation, and the incorporation of expatriates, as each country seeks to balance modernization with longstanding traditions and evolving societal expectations.

Central to this transformation is Saudi Arabia’s Vision 2030, launched in 2016 as a comprehensive framework to diversify the economy and strengthen the Kingdom’s global position (Vision 2030, 2024; IMF, 2025b). Anchored in three pillars—a vibrant society, a thriving economy, and an ambitious nation—the initiative aims to reduce dependence on oil revenues through the expansion of the sovereign wealth fund, the privatization of state-owned enterprises (e.g., Saudi Aramco), and the modernization of key sectors, including tourism, defense, and manufacturing. Equally important, Saudi Arabia’s geographic location constitutes a strategic asset underpinning these ambitions. With coastlines along both the Red Sea and the Persian Gulf, the Kingdom occupies a pivotal position at the intersection of major maritime trade routes connecting Asia, Africa, and Europe. Consequently, maritime policy has become a cornerstone of Vision 2030, with a dual focus on promoting regional integration and establishing Saudi Arabia as a leading global logistics and trade hub. This strategy aims to attract foreign investment, strengthen economic resilience, and reinforce the Kingdom’s central role in international commerce. Against the backdrop of persistent regional instability and shifting global dynamics, these initiatives reflect an evolution in Saudi strategic thinking toward greater adaptability and proactive engagement. The Kingdom’s strategic vision increasingly emphasizes innovation and active participation in global affairs, reflecting a nuanced understanding of the challenges and opportunities shaping the contemporary Middle East. Nevertheless, a critical gap remains in understanding how these economic ambitions can be safeguarded against volatile geopolitical realities. Accordingly, this study addresses the following central research question: How does the interplay between Saudi Arabia’s internal economic diversification and external geopolitical instability

necessitate a paradigm shift in its maritime strategy from coastal defense to global power projection? To answer this question, the article pursues three specific objectives: first, to critically analyze the evolution of Saudi strategic thinking beyond conventional historical narratives; second, to synthesize the internal and external drivers through an integrated SWOT framework; and third, to formulate actionable policy recommendations that bridge the gap between the Kingdom's domestic and external contexts and its operational maritime realities.

1. Literature Review

The existing literature on the research topic can be divided into two broad areas: Saudi strategic thinking and Saudi maritime policymaking. Regarding the first area, the availability of dedicated scholarly resources remains limited. Furthermore, although the literature on Saudi Arabia's transformation is extensive, it remains fragmented between broad strategic analyses and narrowly focused sectoral studies. Concerning Saudi strategic thinking, Aldhobaib (2025) argues that although the Middle East is widely perceived as politically, economically, and socially unstable, Saudi Arabia represents an important exception. Building upon Vision 2030 and the growing body of scholarship on the Kingdom's socio-economic transformation, the study explores how organizational strategy theories and practices can be advanced by directing scholarly attention toward Saudi Arabia's evolving context. However, the article's primary limitation is that it uncritically translates a national vision into a proposed organizational research agenda without sufficient analytical rigor, critical engagement, or contextual depth.

Similarly, Albadri and Nasereddin (2019) argue that the principal challenge facing the Arab world is the persistent gap between the need for effective strategic thinking and planning and the fragmented manner in which these practices are implemented across governments, institutions, and organizations. They contend that if Arab states adopt more coherent, mature, and effectively implemented strategic approaches across sectors such as governance, security, and technology, development outcomes could improve substantially. Although the study draws upon numerous case studies and empirical evidence to illustrate both the theory and practice of strategic management in the region, it overlooks the diverse domestic contexts of Arab states and the ways in which these contexts shape strategic thinking and planning.

The second area concerns Saudi maritime policymaking. Sheline and Ulrichsen (2025) provide a comprehensive assessment of centralized reforms, the expansion of the Public Investment Fund, and progress toward non-oil economic diversification, supported by updated evidence on implementation challenges following the disruptions of 2023. However, their analysis focuses primarily on economic and social transformation and does

not adequately integrate these developments with the maritime security challenges arising from instability in neighboring waters. Likewise, Sarwar (2022) presents robust quantitative evidence on public investment, projected non-oil GDP growth for 2025–2026, and sustainable maritime initiatives such as the Red Sea Development Project. Nevertheless, the study lacks a clear causal framework, treating sovereign investment largely as a proxy for success without demonstrating its direct effects on port efficiency or maritime security.

With respect to Saudi Arabia's external environment and its implications for maritime policymaking, Rodríguez-Díaz et al. (2024) empirically demonstrate how Houthi activities have intensified maritime vulnerabilities and disrupted global trade while simultaneously highlighting the Kingdom's strategic geographic advantages. For instance, they note that the Red Sea accounts for approximately 15 percent of global maritime traffic. However, their analysis is primarily descriptive, identifying existing vulnerabilities without providing an analytical framework to explain how Saudi maritime strategy should evolve. Consequently, the study does not address the necessary transition from a predominantly defensive posture to one centered on proactive capacity-building. Similarly, Dorj (2020) examines Saudi Arabia's response to the rise of the Houthis in Yemen and concludes that Riyadh has pursued policies intended to preserve a politically fragile Yemen while simultaneously limiting the influence of the country's Shia population within positions of political power. However, despite its theoretically grounded analysis, the study does not examine Saudi Arabia's maritime countermeasures against the Houthis, which constitute a central component of the Kingdom's maritime strategy.

Overall, a critical synthesis of the existing literature reveals a persistent divide: studies tend to prioritize either the economic ambitions of Vision 2030 or the security challenges posed by instability in neighboring waters, while rarely integrating these dimensions through maritime policy as a unifying analytical framework. This gap remains evident despite the relative stabilization of regional waters in early 2026, as the Kingdom's economic objectives continue to intersect with enduring geopolitical risks.

2. Strategic Thinking and Maritime Policy: A Combined Framework for Analysis

This section integrates the conceptual foundations of strategic thinking and maritime policy into a unified analytical framework. Broadly defined, strategic thinking is a multifaceted cognitive process involving foresight, critical analysis, adaptability, coherence, and creativity, all of which contribute to the formulation and implementation of effective strategies across diverse contexts, including the maritime domain. Fundamentally, strategic thinking entails anticipating future scenarios, identifying potential challenges and opportunities, and designing policies that are consistent with

long-term objectives. Rather than being merely reactive, it is inherently proactive, enabling organizations and states to navigate uncertainty and complexity with greater confidence and agility. In the maritime domain, strategic thinking is particularly important because geopolitical competition, economic interdependence, technological innovation, and security dynamics continuously reshape the strategic environment.

One of the defining characteristics of strategic thinking is foresight. Foresight refers to the ability to anticipate potential future developments and prepare proactively for their implications. This capability is especially important in maritime strategy, where geopolitical realignments, technological advances, and environmental changes can significantly influence maritime security and operations. Through strategic foresight, policymakers and decision-makers can anticipate emerging trends and formulate policies that position their states advantageously in an evolving strategic environment. Consequently, foresight extends beyond merely predicting future events; it also requires understanding the structural forces and long-term trends that shape change within the maritime domain (Eerola & Jørgensen, 2002).

Critical analysis represents another essential component of strategic thinking. It involves the systematic evaluation of information to understand complex situations and support informed decision-making. Within the maritime domain, critical analysis enables policymakers to evaluate the strengths, weaknesses, opportunities, and threats (SWOT) affecting national maritime interests. The effective application of SWOT analysis allows decision-makers to identify and capitalize on internal strengths, including strategic geographic location, advanced port infrastructure, and investment in digital logistics, while simultaneously addressing weaknesses such as dependence on oil revenues and the limited availability of an indigenous maritime workforce. It also facilitates the identification of external opportunities, including expanding trade routes, technological innovation, and international partnerships, while anticipating threats such as regional instability, piracy, and geopolitical tensions. By systematically integrating internal capabilities with external conditions, SWOT provides a balanced analytical framework that supports both strategic planning and policy implementation.

Adaptability constitutes another fundamental characteristic of strategic thinking, particularly within the maritime sector. Maritime affairs are characterized by continuous uncertainty arising from political developments, technological breakthroughs, environmental pressures, and changing patterns of international trade. Effective strategic thinking therefore requires the capacity to revise policies and operational plans in response to evolving circumstances without losing sight of long-term strategic objectives. Such adaptability ensures that maritime strategies remain relevant, resilient, and

capable of responding effectively to both anticipated and unforeseen challenges while preserving national competitiveness.

Equally important is coherence and strategic alignment. In the maritime domain, coherence requires the alignment of naval operations, diplomatic initiatives, economic policies, and institutional reforms with broader national strategic objectives. For example, efforts to strengthen strategic partnerships through joint naval exercises should reinforce wider goals related to regional stability, maritime security, and international cooperation. Likewise, investments in maritime infrastructure—including port modernization, logistics networks, and naval facilities—must complement the state's broader economic and security priorities. Maintaining coherence across these different policy areas minimizes strategic fragmentation, reduces policy contradictions, and ensures that individual initiatives collectively contribute to the successful achievement of national objectives (Farjoun & Fiss, 2022).

Finally, creativity and innovation represent essential—yet often overlooked—dimensions of strategic thinking. In an increasingly complex international environment, the ability to develop innovative responses to emerging challenges has become a defining characteristic of effective strategy. This requirement is particularly evident in the maritime domain, where conventional approaches are often insufficient to address challenges such as hybrid warfare, cyber threats, autonomous maritime technologies, and the environmental consequences of climate change, including rising sea levels and shifting maritime boundaries (Proctor, 2010). Creative strategic thinking encourages the development of new doctrines, operational concepts, and technological capabilities that strengthen a state's capacity to safeguard its maritime interests while enhancing its ability to project influence beyond its immediate region.

Collectively, the characteristics of strategic thinking—foresight, critical analysis, adaptability, coherence, and creativity—provide the conceptual foundation for the formulation and implementation of effective maritime strategies. These characteristics enable policymakers to anticipate emerging challenges, make evidence-based decisions, adapt to changing strategic environments, and ensure that maritime policies remain aligned with broader national objectives. By integrating these elements into strategic planning, maritime states are better positioned to safeguard their interests, enhance resilience, and respond proactively to the evolving opportunities and risks of the global maritime environment.

Accordingly, this study employs the SWOT framework as its principal analytical tool for examining Saudi Arabia's strategic thinking in relation to maritime strategy and policymaking. The framework provides a comprehensive means of evaluating the interaction between domestic capabilities and external conditions, thereby facilitating a holistic assessment of the Kingdom's evolving maritime strategy.

3. Saudi Strategic Maritime Considerations: Internal and External Situation

Saudi Arabia's maritime strategy is fundamentally shaped by a volatile regional and global environment, where technological progress, economic uncertainty, and shifting political alliances create both risks and opportunities. The SWOT framework goes beyond simply listing factors; it helps evaluate their strategic implications and interconnections.

In terms of internal context, geographically, Saudi Arabia possesses a unique advantage: its coastlines along the Red Sea and the Persian Gulf position it at the crossroads of vital global trade routes, including the Suez Canal and the Strait of Hormuz. This strategic location enables the Kingdom to exert influence over maritime corridors essential for the movement of energy and goods (Rodríguez Díaz et al., 2024: 14). Investment in Vision 2030 has catalyzed the modernization of key infrastructure, such as Jeddah Islamic Port, with recent expansions increasing capacity toward 5 million TEUs and ongoing upgrades continuing into 2026 (DP World, 2025). These initiatives enhance port efficiency and resilience amid regional disruptions.

The drive for economic diversification under Vision 2030 is evidenced by Saudi Arabia's focus on intelligent logistics, renewable energy, and advanced maritime services. There is substantial investment in environmental infrastructure, including solar powered warehouses and electric port equipment, aligning the Kingdom with global trends toward decarbonization and sustainable growth (Sarwar, 2022). Collaboration with international partners further accelerates technology transfer and the adoption of best practices.

Saudi Arabia's investments, expected to contribute SAR 22 billion and create 100,000 jobs by 2030, provide a strong competitive edge. These investments also support increased soft power and job creation, helping stabilize the country's youthful population. When combined with adaptability, these strengths could drive non oil GDP growth (around 4–5 percent in recent quarters) and contribute to overall GDP projections of about 4 percent for 2025–2026 (IMF, 2025a).

Despite these strengths, internal challenges persist. The regulatory landscape has grown more complex, with strict enforcement of labor laws, environmental mandates, and Saudization policies. These measures require consistent investment in workforce training and compliance systems (Vision 2030, 2024; Al Yassini, 2020). Challenges in implementing the Commercial Maritime Law (Royal Decree No. M/33, 2018), particularly regarding liability for accidents and the responsibilities of foreign flagged vessels, can increase operational risk and complicate cross border collaboration. For example, delays in dispute resolution or unclear liability provisions can discourage foreign investors and raise costs for operators.

Financial sustainability is arguably the most critical concern in this sector. The estimated \$2 trillion investment required for Vision 2030 places immense pressure on national finances and renders the maritime sector highly vulnerable to fluctuations in oil prices (IMF, 2025a). Despite progress in privatization and diversification, exposure to global oil market volatility remains a risk, with non oil sectors now contributing over 55 percent to GDP amid projected overall growth of around 4 percent in 2025–2026 (IMF, 2025a). Therefore, deepening economic diversification—expanding private sector participation, foreign investment, and supporting auxiliary industries—is not merely desirable but imperative.

Overall, Saudi Arabia faces several weaknesses which, when coupled with external threats, could delay key projects such as those of the Public Investment Fund (PIF). If left unaddressed, these weaknesses could slow GDP growth by about 1 percent during disruptions, creating a cycle that undermines the Kingdom's resilience and diminishes its strengths.

On the other hand, Saudi Arabia's external environment can be analyzed by examining two key aspects: opportunities for engagement with extra regional powers and various intra regional threats. To achieve its goal of becoming a global maritime powerhouse, the Kingdom is pursuing a multi aligned foreign policy while simultaneously building resilience to regional instability.

Saudi Arabia's maritime aspirations are deeply interwoven with its evolving diplomatic and economic relationships. By expanding cooperation with both Western and Eastern powers, the Kingdom is positioning itself as a central hub in international trade. Regarding Western alliances (USA, EU, UK, and France), the enduring alliance with the United States remains a cornerstone of Saudi maritime security, providing advanced military technology, joint exercises, and intelligence sharing that enhance situational awareness (Ardemagni, 2024). Concurrently, the EU, France, and the UK have been indispensable in modernizing infrastructure. France's role is pronounced in shipbuilding joint ventures (Vidal Ribe, 2023), while the UK has spearheaded the development of Special Economic Zones (SEZs) like Ras al Khair, which are projected to create over 80,000 jobs by 2030. These partnerships have successfully harmonized Saudi regulations with international standards, ensuring ports remain competitive and green compliant (IMF, 2025a).

With respect to the pivot to the East strategy, Saudi Arabia has intensified relations with China and Russia. As China's leading crude oil supplier, the Kingdom is a critical gateway for the Belt and Road Initiative (BRI), attracting substantial Chinese investment into port infrastructure and giga projects like NEOM (Ardemagni, 2024). Relationships with Russia, stabilized through the OPEC+ framework, have expanded beyond energy into cybersecurity and high tech industries.

Thus, Saudi Arabia has several opportunities, including regional partnerships through initiatives like the BRI, which support economic diversification. With creativity, green logistics initiatives could attract more foreign direct investment (FDI), with recent quarterly increases showing substantial progress toward Vision 2030 targets (General Authority for Military Industries, 2025). Saudi Arabia's alliances, including defense pacts and multinational coalitions, enhance deterrence and protect maritime routes, helping stabilize security in neighboring waters and supporting the recovery of shipping in 2026.

Despite these opportunities, the Kingdom faces significant hurdles that threaten its status as a reliable logistics hub. The region suffers from geopolitical instability caused by non state actors. The primary concern remains instability in key maritime corridors (Sheikhhosseini & Mohammadi, 2025: 159). Houthi attacks between 2023 and 2025 caused severe disruptions, at one point reducing shipping activity by over 50 percent and increasing freight rates by 300 percent (Rodríguez Díaz et al., 2024). While late 2025 and early 2026 have shown signs of partial recovery—with major carriers resuming limited transits—risks persist (Stausbøll, 2025; Drewry Shipping Consultants, 2025). These attacks not only drive up insurance premiums but also force rerouting, which increases fuel consumption and challenges the Kingdom's carbon neutrality goals.

In addition, persistent tensions involving Iran, Israel, and the Persian Gulf states create an unpredictable security environment in both the Red Sea and the Persian Gulf. Asymmetric threats—such as the use of low cost drones and anti ship missiles by non state actors—constantly pressure the Kingdom to invest in sophisticated surveillance and defense systems (Ardemagni, 2024). The trafficking of illicit arms and narcotics also remains a significant threat to maritime security (Kattach, 2024). These activities can damage the Kingdom's reputation as a secure trade partner and fund non state actors, further destabilizing the region.

In response to these multi layered risks, Saudi Arabia is integrating technology driven solutions, such as AI driven cargo inspection and automated tracking, to enhance supply chain transparency. Ultimately, the Kingdom's ability to maintain a comprehensive, multi layered diplomatic and security response will be the deciding factor in achieving the maritime objectives of Vision 2030.

To sum up, Saudi Arabia's maritime sector faces intensified risks from geopolitical instability. Recent data empirically document Houthi impacts as a primary driver of trade volatility, causing significant disruptions. Despite a partial recovery emerging in late 2025—with major carriers resuming limited transits following Houthi pauses tied to the Gaza ceasefire—the global trade effects, manifesting as increased insurance premiums and rerouted logistics, underscore the geographic vulnerabilities of the corridors.

This necessitates a paradigm shift toward proactive security alliances and corridor diversification, as identified in the research question.

4. Mapping the Future: Saudi Arabia's Maritime Strategy

In light of the internal and external considerations identified in the preceding SWOT analysis, Saudi Arabia has, over the past decade, pursued an ambitious strategy to modernize its naval capabilities and develop a globally competitive maritime industry. Recognizing maritime security as a strategic pillar of Vision 2030, the Kingdom has prioritized major defense and industrial initiatives, including the Tuwaiq Project (Multi-Mission Surface Combatant Program), the expansion of the Sarawat Project, and the localization efforts led by Saudi Arabian Military Industries (SAMI). Collectively, these initiatives are strengthening the Royal Saudi Naval Forces (RSNF), reinforcing the Western Fleet and Border Guard units, and enhancing the Kingdom's capacity to respond to emerging regional security challenges (Vidal Ribe, 2024; International Institute for Strategic Studies, 2025). Motivated by the need to secure vital sea lines of communication (SLOCs) and address growing regional instability, these modernization efforts constitute an integral component of Saudi Arabia's broader strategy of economic diversification and international engagement. Beyond enhancing military readiness, the projects stimulate technological innovation, promote workforce development, expand domestic industrial capabilities, and gradually reduce dependence on foreign defense suppliers.

4.1. Saudi Arabian Military Industries (SAMI)

Established in 2017 as a wholly owned subsidiary of the Public Investment Fund (PIF), Saudi Arabian Military Industries (SAMI) serves as the Kingdom's national defense champion and plays a central role in achieving Vision 2030's objective of localizing 50 percent of military procurement by 2030. The company operates through five integrated business divisions: Aerospace, Land Systems, Naval Systems, Defense Systems, and Advanced Electronics.

Within the maritime sector, SAMI focuses on the manufacture, assembly, maintenance, and modernization of advanced naval platforms while facilitating technology transfer from international partners. Its portfolio includes the domestically developed HAZEM Combat Management System—including the HAZEM Lite variant introduced in 2024—as well as uncrewed surface and underwater vehicles, mine countermeasure technologies, and integrated naval command-and-control systems (Saudi Arabian Military Industries, 2025; Naval News, 2024a).

A cornerstone of SAMI's maritime strategy is its joint venture with the Spanish shipbuilder Navantia under the SAMI-Navantia Naval Industries partnership. This collaboration supports the Sarawat Project through combat-system integration, personnel training, technology transfer, and progressively greater localization of naval production. Following the successful delivery of

the original five Avante 2200-class corvettes by March 2024, the partners signed a follow-on agreement in December 2024 for the construction of three additional vessels featuring a substantially higher level of local industrial participation (Navantia, 2024a; Breaking Defense, 2024). In parallel, discussions continue with France's Naval Group regarding potential cooperation in underwater warfare technologies, building upon earlier bilateral agreements (SAMI Naval Group, 2025).

Beyond manufacturing, SAMI has become a major driver of human capital development and defense innovation. Through specialized initiatives such as the Saudi Technical Excellence Program (STEP), the company invests heavily in research and development, workforce training, and the expansion of domestic defense supply chains. These efforts are expected to generate approximately 40,000 highly skilled jobs by 2030 while strengthening Saudi Arabia's long-term technological self-reliance. By early 2026, defense localization had reached approximately 25 percent—up from 24.89 percent at the end of 2024—with SAMI playing a pivotal role through new industrial partnerships, technology-transfer agreements, and domestic procurement initiatives (General Authority for Military Industries, 2025; Arab News, 2025).

4.2. King Salman International Complex for Maritime Industries and Services

As of 2026, the King Salman International Complex for Maritime Industries and Services at Ras Al-Khair is fully operational, with additional expansion phases continuing to enhance its industrial capacity. Anchored by International Maritime Industries (IMI), the complex has become one of the world's largest integrated maritime industrial facilities, specializing in commercial and naval shipbuilding, offshore platform construction, and comprehensive maintenance, repair, and overhaul (MRO) services (Aramco Life, 2024).

The project represents a strategic partnership involving Aramco, Bahri, Hyundai Heavy Industries, and Lamprell, combining international expertise with domestic industrial development. The complex offers a comprehensive range of maritime services, including vessel construction, retrofitting, advanced manufacturing, logistics support, and marine equipment production. Its strategic location along Saudi Arabia's eastern coast enhances its attractiveness to international clients while reinforcing the Kingdom's ambition to become a regional hub for maritime industries. Equally important, the facility strengthens national self-sufficiency by supporting the maintenance and modernization of the expanding Saudi naval and commercial fleets, thereby reducing reliance on foreign shipyards and improving long-term operational resilience.

4.3. Sarawat Project

The Sarawat (Al-Sarawat) Project formally entered into force in 2018 through a contract with the Spanish shipbuilder Navantia for the construction of five Avante 2200-class multi-mission corvettes. By March 2024, all five vessels—HMS Al Jubail, Al Diriyah, Hail, Jazan, and Unayzah—had been delivered and commissioned into service, with HMS Unayzah becoming the final vessel to join the Royal Saudi Naval Forces in Jeddah (Navantia, 2024a; Naval News, 2024b).

The Al Jubail-class corvettes significantly enhance Saudi Arabia's operational capabilities across multiple warfare domains. Equipped for anti-air, anti-surface, anti-submarine, and electronic warfare missions, the vessels integrate the indigenous HAZEM Combat Management System alongside advanced radar systems, vertical launch systems, anti-ship missiles, lightweight torpedoes, and a 76-mm naval gun. Collectively, these capabilities substantially strengthen the Royal Saudi Naval Forces' ability to respond effectively to multidimensional maritime threats (Navantia, 2024b).

The project extends beyond platform acquisition by incorporating comprehensive crew training, logistics support, maintenance planning, and extensive technology-transfer arrangements through the SAMI-Navantia joint venture. These measures have enabled local systems integration and partial domestic construction, thereby advancing Saudi Arabia's defense-industrial localization objectives. Building upon the success of the initial program, a second contract signed in December 2024 provides for the construction of three additional Avante 2200 corvettes with significantly expanded localization, including domestic block manufacturing, intellectual property transfer, and greater industrial participation. Construction activities accelerated throughout 2025, including steel-cutting and keel-laying milestones, while deliveries are expected to be completed by 2028 (Breaking Defense, 2024; Naval News, 2025). Consequently, the Sarawat Project has evolved into a model of international industrial cooperation, technological transfer, and capacity building, supporting Saudi Arabia's long-term ambition to emerge as a leading maritime power in the Middle East.

4.4. Multi-Mission Surface Combatant (MMSC) Program

The Multi-Mission Surface Combatant (MMSC) Program constitutes another major pillar of Saudi Arabia's naval modernization under the Tuwaiq Project. Implemented in partnership with Lockheed Martin, which serves as the prime contractor for combat systems, and Fincantieri Marinette Marine, responsible for hull construction, the program comprises four guided-missile frigates derived from the U.S. Navy's Freedom-class design (Lockheed Martin, 2025).

The MMSC vessels incorporate a comprehensive suite of advanced combat technologies, including the COMBATSS-21 combat management system, sophisticated surveillance sensors, over-the-horizon missile systems,

SeaRAM point-defense systems, an eight-cell Mk 41 Vertical Launch System capable of deploying missiles such as CAMM, and fully integrated command-and-control capabilities. These technologies enable the vessels to perform a broad spectrum of missions, including anti-air, anti-surface, and anti-submarine warfare, maritime security, anti-piracy operations, coastal defense, and the protection of strategic maritime infrastructure.

The program also includes comprehensive crew training, logistics support, lifecycle maintenance, and interoperability initiatives designed to ensure long-term operational readiness and effective cooperation with allied naval forces. As of January 2026, construction continues to progress according to schedule. The lead vessel, HMS King Saud (820), was launched in Wisconsin in December 2025, with deliveries expected to commence during 2026 (Marine Insight, 2025; Army Recognition, 2025). This strategic partnership with leading American defense contractors reflects Saudi Arabia's commitment to developing a technologically advanced, interoperable, and expeditionary naval force capable of safeguarding national maritime interests while contributing to regional and international maritime security.

4.5. Patrol Vessel Modernization

Initiated in 2015 and continuously expanded through the mid-2020s, the Patrol Vessel Modernization Program aims to strengthen Saudi Arabia's coastal and port security by expanding and modernizing its patrol fleet. The program is primarily supported by Germany's Lürssen, which provides larger offshore patrol vessels, while Saudi Arabian Military Industries (SAMI) plays a central role in advancing localization and technology transfer initiatives. As a result, several classes of high-speed patrol craft have been introduced, equipped with advanced communications, surveillance, maritime interdiction, and weapon systems.

In parallel with the acquisition of new platforms, existing patrol vessels have undergone comprehensive modernization through the integration of advanced navigation, command-and-control, and mission systems. These upgrades have substantially enhanced operational readiness and enabled rapid deployment for search-and-rescue, counter-smuggling, counterterrorism, and border-protection missions. Collectively, these improvements have strengthened the operational capabilities of both the Saudi Border Guard and the Royal Saudi Naval Forces, thereby enhancing the protection of the Kingdom's extensive coastline, strategic maritime infrastructure, and vital economic interests.

Building on these achievements, Saudi Arabia continues to advance its naval transformation in line with the objectives of Vision 2030 through sustained fleet modernization and the expansion of domestic defense-industrial capabilities (International Institute for Strategic Studies, 2025). This long-term strategy emphasizes enhanced maritime capabilities,

technological innovation, industrial localization, and greater self-reliance in defense manufacturing. Key initiatives include:

SAMI Shipbuilding Expansion (2025–2030). Expansion of domestic naval shipbuilding and production capacity through Saudi Arabian Military Industries (SAMI) and strategic partnerships, particularly with International Maritime Industries (IMI), to strengthen local manufacturing capabilities and reduce dependence on foreign suppliers (International Institute for Strategic Studies, 2025; Saudi Arabian Military Industries, 2025).

Maritime Surveillance and Rapid Response Systems (2023–2030). Deployment of integrated radar, satellite, and unmanned platforms to enhance maritime domain awareness, improve early-warning capabilities, and strengthen rapid operational response (Energy Strategy Reviews, 2024: 45).

Localization of Naval Maintenance (2025–2030). Establishment of domestic maintenance, repair, and overhaul (MRO) facilities to improve fleet sustainability while reducing reliance on foreign contractors and external logistical support (Marine Policy, 2024: 10).

Fleet Renewal Program (2025–2030). Continued modernization of the naval fleet through the acquisition and integration of advanced platforms, including additional Avante 2200 corvettes and Multi-Mission Surface Combatant (MMSC) frigates, thereby improving operational flexibility and maritime deterrence (Naval News, 2025; International Institute for Strategic Studies, 2025).

Taken together, these initiatives demonstrate Saudi Arabia's determination to establish itself as a leading regional maritime power. International technology-transfer agreements are expected to strengthen domestic industrial capabilities, while continued investment in indigenous shipbuilding, maintenance infrastructure, and naval support facilities will generate long-term strategic, economic, and technological benefits. Consequently, these modernization efforts are expected not only to enhance the Kingdom's maritime security but also to reinforce the sustainability of its defense industry and its broader strategic autonomy (Journal of the Knowledge Economy, 2025: 120).

5. The Evolution of Saudi Arabia's Maritime Strategy: From Coastal Defense to Global Ambition

As noted, Saudi Arabia's maritime strategy has undergone a profound transformation over recent decades. Initially, the Kingdom prioritized coastal defense and the secure transport of hydrocarbons. Today, the strategy has evolved into a sophisticated, multidimensional approach that integrates national security, economic diversification, and regional diplomacy. This shift is anchored in Saudi Arabia's internal strengths and weaknesses, as well as its external opportunities and threats, as discussed earlier.

Broadly, from 1990 to 2015, Saudi Arabia's maritime strategy was predominantly focused on safeguarding key ports and securing critical shipping lanes in response to evolving regional threats. During this period, formal security protocols for port facilities were established, reflecting a growing recognition of maritime vulnerabilities. The Kingdom's maritime priorities were shaped by the broader geopolitical landscape, particularly in the wake of the 1991 Persian Gulf War, which underscored the need to protect vital maritime infrastructure as staging grounds for coalition operations (Ardemagni, 2024). This conflict highlighted the geostrategic importance of Saudi Arabia's coastal waters and maritime infrastructure. In its aftermath, Saudi policymakers became increasingly aware of the vulnerabilities and strategic opportunities associated with their maritime domain, prompting the gradual implementation of formal security protocols for port facilities and greater attention to safeguarding shipping lanes. More recently, maritime disruptions peaked between 2023 and 2025 but showed signs of partial recovery in late 2025 and early 2026, amid a fragile period of relative calm, with major shipping carriers resuming limited transits and the number of attacks declining (Xeneta, n.d.; Drewry Shipping Consultants, 2025).

The conflict accelerated naval modernization through investments in advanced surveillance systems, fleet expansion, and strategic partnerships. It also reinforced integrated policy frameworks that align security, economic, and environmental objectives with Vision 2030 (Sheline & Ulrichsen, 2025). These developments reflect a broader regional response to emerging threats, with Saudi Arabia prioritizing the protection of vital maritime infrastructure to ensure national security and the uninterrupted flow of hydrocarbons. The pace of naval development remained measured during this period, with upgrades primarily responding to immediate security needs rather than being driven by a long-term strategic vision. Nevertheless, this period laid the foundation for subsequent transformations, as the lessons of the Persian Gulf War underscored the need for a resilient maritime strategy capable of addressing geopolitical challenges while supporting long-term economic ambitions (Vidal Ribe, 2024; International Institute for Strategic Studies, 2025).

Saudi Arabia's maritime security evolved significantly as a result of the Yemeni conflict, which began in 2015 and profoundly affected the Kingdom's interests in the Red Sea. Persistent threats posed by the Iran-backed Houthis, particularly attacks on vessels transiting key maritime routes, intensified Saudi security concerns. In response, Saudi Arabia expanded its naval operations, often in cooperation with coalition partners, making the Red Sea one of the world's most volatile maritime environments (International Crisis Group, 2025; Ardemagni, 2024). The Saudi-led coalition's naval blockade of Yemen shifted military operations toward restricting the flow of arms to the Houthis, although it also generated severe humanitarian consequences and attracted international criticism

(International Crisis Group, 2025). The conflict further accelerated naval modernization, as Riyadh invested in advanced surveillance technologies, fleet expansion, and international partnerships to deter asymmetric threats, including missile and drone attacks, while protecting trade routes and hydrocarbon exports (Vidal Ribe, 2024).

Protracted instability in Yemen and the Red Sea fostered the development of stronger partnerships, including intelligence sharing and joint military exercises. These partnerships reflect the interconnected nature of maritime security, regional stability, and commercial activity. The conflict also reinforced integrated policy frameworks that align economic, security, and environmental objectives, thereby supporting adaptation while advancing the diversification and sustainable development goals of Vision 2030 (Sheline & Ulrichsen, 2025; Vidal Ribe, 2024). In summary, the Yemen conflict has both challenged and catalyzed the evolution of Saudi maritime security by accelerating modernization, strengthening international cooperation, and promoting a more comprehensive approach to maritime governance in the Red Sea and beyond. It also underscores the critical role of maritime security in safeguarding national interests and promoting regional stability within an increasingly volatile strategic environment (International Crisis Group, 2025).

Saudi Arabia responded to these challenges with an ambitious naval modernization and investment program. This program includes advanced surveillance systems, such as radar networks, uncrewed vehicles, and maritime domain awareness platforms. The Kingdom has prioritized the acquisition of multi-role vessels to counter threats posed by non-state actors, particularly the Houthis. Investments in strategic infrastructure, including the King Salman International Complex, are positioning Saudi Arabia as a regional leader in shipbuilding and maritime logistics (Aramco Life, 2024; International Institute for Strategic Studies, 2025). Riyadh has also strengthened its partnerships through joint military exercises, intelligence sharing, and coordinated maritime patrols with allied countries, thereby enhancing deterrence and rapid-response capabilities. This modernization agenda is fully aligned with Vision 2030 by securing trade routes, attracting foreign investment, and expanding non-oil sectors such as logistics, tourism, and manufacturing (Ardemagni, 2024).

Multinational coalitions, including U.S.–Saudi initiatives, have expanded their presence in the Red Sea through joint exercises, intelligence sharing, and coordinated patrols aimed at deterring attacks and safeguarding maritime commerce. Nevertheless, persistent externally supported non-state threats continue to challenge these efforts and highlight the need for adaptive maritime security strategies (Rodríguez-Díaz et al., 2024; Combined Maritime Forces, 2025). Ongoing instability has also prompted a reassessment of maritime risk management, resilient logistics, supply-chain diversification, and diplomatic engagement to address the underlying causes

of maritime insecurity. As one of the world's most important trade and energy corridors, the security of the Red Sea remains both a regional and an international priority, continuing to shape strategic calculations (International Crisis Group, 2025; Raydan & Nadimi, 2024).

In response to a rapidly evolving threat environment, Saudi Arabia has acted decisively to strengthen its maritime and naval capabilities. The Kingdom's active participation in multinational security coalitions, such as the Combined Maritime Forces (CMF), reflects its recognition of the importance of collective security and intelligence sharing in countering both state and non-state threats (NAVCENT, 2022; Mazzucco, 2023). Beyond military initiatives, Saudi Arabia is pursuing a comprehensive strategy that integrates sustainability through environmental monitoring, the adoption of clean energy technologies in ports, and innovative economic zones such as NEOM's OXAGON with broader security objectives (Vision 2030, 2024; World Economic Forum, 2024). The establishment of the Research Development and Innovation Authority (RDIA) represents a forward-looking investment in technological resilience, accompanied by a 600% increase in research and development funding focused on areas that strengthen both economic growth and national security. These initiatives are designed to safeguard national interests while enhancing the Kingdom's capacity to adapt to an evolving global security environment. Saudi Arabia's Vision 2030 also emphasizes sustainable development across strategic infrastructure sectors, including maritime infrastructure and port development, in line with environmentally sustainable standards (Harshan, 2024).

Conclusion

Saudi Arabia's Vision 2030 and its evolving maritime strategy reflect a robust response to the complex geopolitical and economic challenges that have reshaped the region since October 7, 2023. The Kingdom has demonstrated considerable adaptability in the face of regional instability, including threats to critical maritime corridors such as the Red Sea and the Persian Gulf. By investing in naval capabilities, participating in multinational security coalitions, and integrating sustainability and innovation into its logistics sector, Saudi Arabia is positioning itself as a leading hub for global trade and the blue economy.

The ongoing transition toward a multipolar international order and the emergence of new global power centers have prompted Saudi Arabia to diversify its strategic partnerships and strengthen its regulatory frameworks, thereby enhancing its resilience against external shocks. Strategic investments in infrastructure, digitalization, and environmental sustainability—exemplified by developments at Jeddah Islamic Port and NEOM's OXAGON—underscore the Kingdom's commitment to aligning its national objectives with international best practices.

Looking ahead, continued progress will depend on evidence-based policymaking, effective public-private cooperation, and the integration of advanced technologies. By placing flexibility, innovation, and international engagement at the center of its maritime strategy, Saudi Arabia is not only safeguarding its national interests but also contributing to the resilience and prosperity of global supply chains. The adoption of an Integrated National Maritime Policy will be essential for harmonizing sectoral efforts, maximizing economic opportunities, and strengthening the Kingdom's leadership within the rapidly evolving global maritime landscape.

Moreover, Saudi Arabia's pursuit of sustainable development and economic diversification remains an ongoing process that will require sustained commitment, adaptive leadership, and continuous institutional reform. Recent geopolitical developments, particularly those following the events of October 7, 2023, and the subsequent Israeli military campaign, have accelerated a period of strategic realignment across the Persian Gulf and the broader Asian region. This increasingly uncertain security environment has encouraged Riyadh to strengthen its national security through new strategic partnerships and more diversified defense arrangements.

The formalization of a mutual defense partnership with nuclear-armed states, such as Pakistan, reflects this proactive approach by reinforcing the Kingdom's long-term security architecture, enhancing its deterrence capabilities, and supporting the development of its domestic defense industry. At the same time, Saudi Arabia's cooperation with international organizations and its alignment with global standards provide a strong foundation for long-term prosperity, ensuring that economic diversification and national security continue to reinforce one another. As Vision 2030 enters its next phase, Saudi Arabia will need to continuously assess emerging risks, promote innovation across strategic sectors, and maintain open channels of regional and international cooperation.

Ultimately, the successful realization of these ambitious objectives will position Saudi Arabia not only as a leading actor in regional security and the blue economy but also as a forward-looking state capable of contributing meaningfully to global maritime governance. Through resilience, innovation, and strategic vision, the Kingdom is well positioned to advance its national interests while promoting the stability, sustainability, and growth of the international maritime system.

To ensure the long-term success of these ambitions, the following policy recommendations are proposed, drawing upon the SWOT analysis and recent developments through early 2026:

- **Accelerate the implementation of an Integrated National Maritime Policy.** Formalize and implement a comprehensive Integrated National Maritime Policy by mid-2026 to harmonize economic, security, environmental, and technological objectives

across government institutions. The policy should strengthen coordination among the Ministry of Transport, the Royal Saudi Naval Forces, the Saudi Ports Authority (Mawani), and the Public Investment Fund, while ensuring consistency with the third phase of Vision 2030, which commenced in 2026 and emphasizes maximizing the impact of previous reforms.

- **Strengthen multilateral and regional maritime security cooperation.** Expand Saudi Arabia's leadership within the Council of Arab and African States Bordering the Red Sea and Gulf of Aden by initiating joint coast guard training programs and institutionalized mechanisms for political coordination. At the same time, deepen participation in the Combined Maritime Forces and the International Maritime Security Construct, while exploring Saudi-led initiatives for AI-enabled maritime surveillance and intelligence sharing to address residual asymmetric threats in the post-2025 Red Sea security environment.
- **Prioritize blue economy sustainability and the expansion of marine protected areas.** Fully implement the National Red Sea Sustainability Strategy with the objective of protecting 30 percent of marine and coastal areas by 2030. This goal should be supported through accelerated investment in regenerative tourism initiatives, such as Red Sea Global projects, increased deployment of renewable energy in ports, with a target of achieving a 50 percent renewable energy mix, and effective implementation of the 2026 Red Sea Digital Guide and its associated regulatory framework.
- **Enhance technological development and workforce localization within the maritime sector.** Expand investments in artificial intelligence, digital logistics, and smart-port technologies, including Mawani's digital transformation initiatives, while increasing research and development funding. Simultaneously, strengthen Saudization policies to create approximately 100,000 blue economy jobs by 2030 and deepen partnerships with international firms to facilitate technology transfer in shipbuilding through SAMI, as well as cybersecurity and other advanced maritime technologies.
- **Diversify strategic partnerships and strengthen infrastructure resilience.** Capitalize on the gradual recovery of Red Sea shipping routes, together with continued development of Persian Gulf ports such as Dammam and Jubail, to reduce strategic vulnerabilities. At the same time, pursue a balanced investment strategy by expanding cooperation with both Eastern partners, particularly within China's Belt and Road Initiative, and Western allies, thereby supporting projected non-oil GDP growth of 4–5 percent in 2026, as forecast by the IMF and the Saudi Ministry of Finance.

If implemented proactively, these recommendations will strengthen Saudi Arabia's position as a resilient global logistics and maritime hub while

promoting sustainable economic growth, enhancing national security, and increasing the Kingdom's capacity to adapt to an evolving geopolitical and economic environment.

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