



Fault Lines in the Horn of Africa

THE GULF STATES, TURKEY, AND ISRAEL
BATTLE FOR RED SEA INFLUENCE



Liam Karr and Michael DeAngelo

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A M E R I C A N E N T E R P R I S E I N S T I T U T E

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Executive Summary

Competition involving the Gulf states and Turkey in the Horn of Africa is exacerbating preexisting African conflicts and risking a regional proxy war on both sides of the Red Sea. A new era of middle-power competition since around 2020 has mapped onto already existing African conflicts and hardened the local and regional divide between an Emirati- and Israeli-backed axis of revisionists and a coalition of status quo African states aligned with Egypt, Saudi Arabia, and Turkey.

The United Arab Emirates (UAE) has been an essential ally for an ambitious Ethiopia, the main patron of the paramilitary Rapid Support Forces (RSF) in Sudan, and the leading partner for local Somali governments pursuing greater autonomy. Israel has followed suit in Ethiopia and Somalia. Egypt, Qatar, Saudi Arabia, and Turkey have partnered with the Sudanese Armed Forces (SAF) and their internationally recognized government and the Federal Government of Somalia (FGS). Egypt and Saudi Arabia have grown additional ties with Djibouti and Ethiopia's archrival, Eritrea, to contain Ethiopia and the UAE-Israel duo, respectively, across the region.

This external competition has further convoluted, intertwined, and regionalized African disputes and raised the risk of horizontal escalation into a proxy war on both sides of the Red Sea. Egypt and Saudi Arabia have adopted an increasingly confrontational stance against the UAE and its partners since late 2025. The UAE is setting conditions to escalate proxy competition in the Horn of Africa despite recent setbacks.

Several African actors in Ethiopia, Somalia, and Sudan could choose to escalate and drag their middle-power sponsors with them. The nearly three-year-long Sudanese civil war and more recent infighting between Emirati and Saudi proxies in Yemen in December foreshadow the proxy competition set to break out across the region.

The United States cannot stand by as a regional proxy war unfolds among US allies. US partners on both sides of the Red Sea would be distracted from supporting mutual US regional interests, including maritime security, counterterrorism, and containing Iranian influence. Malign actors would simultaneously be prepared to pounce on the chaos. Iran and Russia have already attempted to exploit the civil war in Sudan, and radical Islamist groups—the Iranian-backed Yemeni Houthis, Islamic State Somalia Province, and al Qaeda's most transnationally minded affiliates in Somalia and Yemen—lurk in the shadows. These threats would distract from US priorities to compete with China and Russia elsewhere and secure US interests in the Western Hemisphere.

The United States should act with urgency to mediate the emerging, multilayered regional crisis. Successive US administrations have left the middle powers to their own devices in the Horn of Africa in the belief that US involvement could hinder priorities involving these allies in the Middle East. This dichotomous approach fundamentally fails to understand that the Horn of Africa is part of the Red Sea theater—and, therefore, part of Middle East politics—and has

unwittingly allowed tensions that are now threatening to destabilize the Red Sea and key Gulf state partners to fester.

The United States is uniquely positioned to pull partners across the region together as a neutral intermediary. It will be essential for US officials to reject the zero-sum outlook exacerbating regional tensions. That means being willing to compartmentalize certain issue areas with US partners and impose tangible costs on those whose activities are detrimental to regional stability and US interests. Such an approach should also pursue inclusive solutions to address all parties' concerns and build a more durable, peaceful, and mutually beneficial regional architecture.

First, the United States and the international community must apply tangible pressure against actions detrimental to regional stability, including activity in Africa, to stabilize the Red Sea. A hands-off approach in the Horn of Africa has clearly failed, and tensions on both sides of the Red Sea now threaten to reverberate across the Middle East. US officials should increase high-level diplomatic engagement with all actors, particularly the UAE, and push them to cease actions counterproductive to regional stability.

Sanctions should also be on the table. The Trump administration should heed congressional Republicans' call to sanction the RSF as a Foreign Terrorist Organization or Specially Designated Global Terrorist organization. Such a designation would be a clear warning and enable US officials to penalize specific third-party entities without targeting US partners too broadly.

Second, Trump and other US officials should construct inclusive solutions that create peace dividends for all major parties involved. Picking sides and pursuing an overly punitive approach will likely cause most actors to dig their heels in and will fail to solve the core issues fueling the conflict. US officials should ensure that Emirati concerns in Sudan—namely, Islamist proliferation and the security of the UAE's economic investments—are addressed as part of Sudan peace talks.

The Trump administration should follow through on its repeatedly stated interest in negotiating a long-term deal on the Grand Ethiopian Renaissance Dam

(GERD) that addresses Egypt's core concerns while maximizing the GERD's potential to be a transformative source of power for Ethiopia and the region. US officials can link these talks to negotiations to help Ethiopia secure peaceful and preferential sea access, which will be a defining regional challenge in the next decade.

Third, the United States should construct a more inclusive regional diplomatic architecture. US officials should include the Horn of Africa in Abraham Accords expansion efforts. Saudi Arabia will continue to be the big prize, given its central role in Middle East affairs, but engaging Riyadh's African allies, such as Djibouti, the SAF-backed Sudanese government, and Somalia, will go a long way toward bridging the regional divide in the Red Sea. US officials should also push for a more inclusive Red Sea Council, which currently cannot mediate the current regional divides because it excludes Ethiopia, Israel, and the UAE. Adding more members or even observers would help the body play a more impactful regional role.

Fourth, the United States should engage other potential mediators in the region to amplify its efforts. The Trump administration's peace efforts in the eastern Democratic Republic of the Congo could be a template for multilateral peace efforts that address the international, regional, and domestic dimensions of a multilayered security crisis. Qatar and the United States are already closely cooperating on mediating several other international crises, and Qatar is again positioned as a possible mediator in the Red Sea. Turkey is positioned between the two rival sides regarding Ethiopia and has a proven record of mediating disputes involving Ethiopia. The African Union has been a critical partner in facilitating negotiations to resolve the domestic aspects of African conflicts once external aspects are resolved.

Fifth, the Trump administration should appoint a Senate-approved envoy to the Horn of Africa to support all these efforts. President Trump's senior adviser for Africa, Massad Boulos, has been key to advancing US engagement on the continent, but he needs more support. He is one man covering an entire continent, and it is unreasonable to expect

him to juggle these various crises. A dedicated envoy with the ability to confidently speak on both the administration's and Congress's behalf would greatly increase the chances of successful long-term mediation efforts across the dozen mostly highly centralized actors in the regional disputes.

Finally, the United States and the international community should strengthen additional financing and debt relief tools in the Horn of Africa. Capital is one of African countries' biggest needs as they develop their economies and respond to their ongoing population boom. Middle powers are a leading and essential source of money across Africa, especially in the Horn. However, transactional middle-power partnerships have essentially politicized regional development. Leveraging more bilateral and multilateral funding

schemes and debt forgiveness tools in the region, including ones that include middle-power actors, can depoliticize much-needed foreign investment.

The Critical Threats Project (CTP) will release future reports that delve deeper into the key theaters where tensions and the risk of escalation are highest. These reports will cover northern Ethiopia and Eritrea, Somalia, Sudan, and regional tensions between Egypt and Ethiopia. This report focuses on the regional dimensions of tensions in the Horn of Africa and the Red Sea. It discusses the aforementioned disputes, which are essential to understanding the broader regional picture, but does not provide in-depth forecasts or recommendations to resolve them. These aspects are beyond the scope of this report, but CTP will cover them subsequently.

Introduction

Conflicts in the Horn of Africa have grown increasingly deadly and interconnected, due in part to the growing role of Middle Eastern “middle powers”—the Gulf states and Turkey—and increased competition among these actors (Figure 1). The civil war in Sudan, which is about to enter its fourth year of catastrophic destruction, is the most obvious example. The war has killed at least 150,000 people, unleashed genocidal violence on innocent civilians, and become the world’s worst humanitarian and refugee crisis.¹ The conflict has left 21 million people facing food insecurity, put 15 million children in need of aid, and displaced 14 million people.²

Sudan has also become an opportunity for malign actors, such as Islamist groups, Iran, and Russia. External involvement by the so-called middle powers has undoubtedly contributed to the length and scale of the conflict. Externally provided drones have indiscriminately killed countless Sudanese civilians and enabled the two warring sides to continue their brutal war, in which they commit myriad war crimes with impunity.³

However, Sudan is not the only conflict in the region that these middle powers are exacerbating, and their competition risks fueling horizontal escalation across the Red Sea and Horn of Africa. The Sudanese civil war is one of five major conflicts and political disputes in the Horn of Africa that are central to current geopolitical competition among African and middle-power actors alike. Clan-based federal disputes in Somalia, ethnic-based federal

tensions in Ethiopia, Ethiopia’s quest for sea access, and the Grand Ethiopian Renaissance Dam (GERD) are all further fueling regional tensions. Competition among middle powers has mapped onto these African dynamics and further intertwined and convoluted these challenges. Political disputes have become more likely to turn violent, armed conflicts have intensified, and domestic issues have turned into regional crises as a result.

The United States and its partners must de-escalate rising tensions and avoid a full-blown regional proxy war. The United States is uniquely positioned to pull partners across the region together as a neutral intermediary. The Trump administration must take advantage of its position and mediate inclusive solutions among its African and Middle Eastern partners that will set conditions for long-term stability. That means rejecting the zero-sum outlook prevalent across the region to push for compromises that promote mutually beneficial growth.

Talk is not always enough, however, and the United States must be willing to tangibly pressure partners who commit actions that destabilize the region. Years of US noninterference in middle-power actions in Africa in the name of peace and security in the Middle East have failed, unwittingly allowing tensions that are now turning US allies against each other and threatening to destabilize the entire Red Sea.

Failure risks a conflict that would be detrimental to US interests on both sides of the Red Sea and likely cause a catastrophic humanitarian disaster.

Figure 1. Emerging Coalitions in the Red Sea Arena: Axis of Revisionists vs. Status Quo Axis

Source: Liam Karr.

Note: Regional governments aligned against federal authorities are shaded as independent actors. Shading is based on an assessment of alignment regarding Red Sea-related issues, which are not absolute or indicators of bilateral relations.

A regional conflict could force the United States to choose between key regional allies and divert these allies' attention from advancing US regional interests such as maritime security, counterterrorism, and containing Iran. US adversaries—Iran, al Qaeda and ISIS, and Russia—would have opportunities to exploit the resulting vacuum. The last major war in Ethiopia resulted in up to 600,000 dead, and a regional

war would unleash a destabilizing refugee crisis on already-overburdened neighboring states and possibly even around the globe.⁴ These challenges would distract the United States from focusing on US competition with China and Russia elsewhere and US interests in the Western Hemisphere.

This report aims to equip decision-makers to pursue peace efforts by establishing the middle powers'

strategic outlook in the Horn of Africa and assessing how the interplay between middle powers and the wider region is shaping political and security dynamics on both sides of the Red Sea and beyond. Many have written about the middle powers in Africa and competition among them. This report draws from this work and builds on it to account for rapidly evolving geopolitical dynamics.

Furthermore, little work has provided a comprehensive overview tying all these threads together,

especially the essential role of African dynamics. African actors have agency, and their actions have been intrinsic in shaping the ongoing regional competition and relationships among middle-power actors. This report aims to fill these gaps and provide an up-to-date and thorough foundation from which the international community can develop a more coherent and proactive approach to reinforce regional stability on both sides of the Red Sea.

I. African Affairs

African Fault Lines

At least five major conflicts and political disputes are central to regional and international competition in the Horn of Africa. Three conflicts are primarily domestic power-sharing disputes: the Sudanese civil war, Somali federal tensions, and Ethiopian federal tensions. The other two conflicts are inherently regional: Ethiopian sea access and the GERD. Establishing these issues' basic history and current status is critical to understanding the broader regional picture.

The Sudanese Civil War

The Rapid Support Forces (RSF) started the civil war in 2023 after a yearslong power struggle with the Sudanese Armed Forces (SAF) for control of Sudan's military forces and corresponding patronage networks. The RSF functioned as a de facto counterweight and rival to the SAF in Sudan upon its creation in 2013.⁵ In the early 2000s, longtime Sudanese dictator Omar al Bashir provided funds and weapons to the Janjaweed—a collection of mainly Arab militias who went on to perpetrate the 2003 Darfur genocide—to suppress Sudanese rebels.⁶

Bashir integrated Janjaweed factions into Sudan's security forces in 2013 to create the RSF. The RSF was a parallel paramilitary institution, with independent funding and a separate chain of command directly leading to Bashir. The group became a prominent part of Bashir's security apparatus by providing border security, fighting rebels in central Sudan, and participating

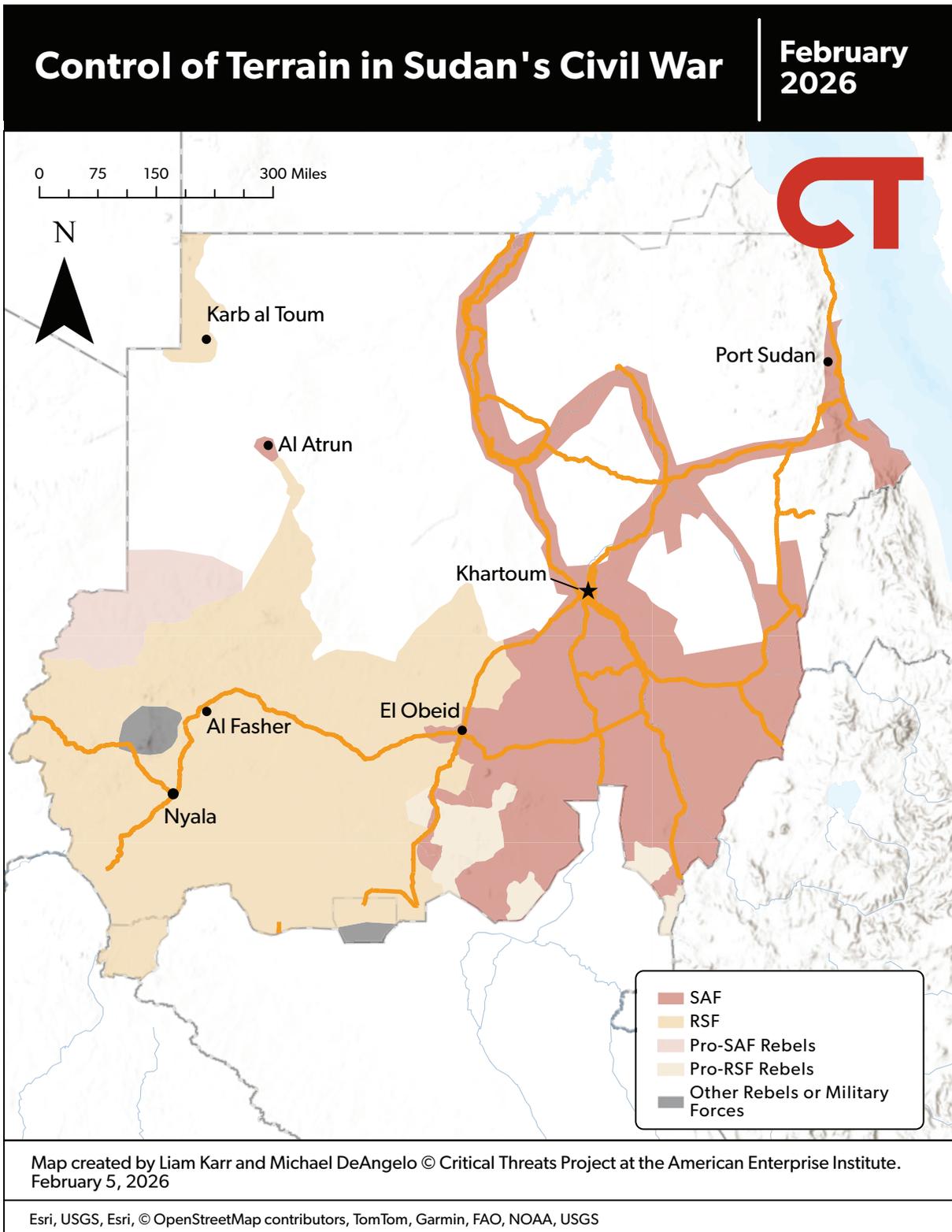
in Sudan's contingent in the Saudi-Emirati coalition against the Houthis in Yemen.⁷ The RSF established itself in lucrative gold mining, mercenary, and smuggling networks as part of its parallel economy.⁸

The RSF and SAF opportunistically cooperated to overthrow Bashir and consolidate control over Sudan between 2019 and 2021. The two groups toppled Bashir in April 2019 after months of protests over deteriorating economic conditions.⁹ The security services then agreed to a joint government with civilians after continued protests in the aftermath of the coup. SAF commander Abdel Fattah al Burhan and RSF head Mohamed Hamdan Dagalo (Hemedti) served as chair and deputy chair of the 11-member Transitional Sovereignty Council, which functioned as the collective head of state.¹⁰ The two leaders conspired to overthrow the transitional government again before civilians could take charge in October 2021.¹¹

The two partners turned on each other in 2023. Both groups had signed a framework in 2022 that aimed to integrate them into a unitary system to address long-standing power- and resource-sharing disputes.¹² Continued disagreements over the timeline and degree of autonomy of RSF units eventually led the RSF to attack the SAF across Sudan in a bid to seize power in April 2023.¹³

The RSF and SAF have consolidated control over the east and west sides of Sudan, respectively, in the first three years of the war (Figure 2). The SAF overturned early RSF gains in the second half of 2024 and the first half of 2025 when it recaptured Khartoum

Figure 2. Control of Terrain in Sudan's Civil War



Source: Liam Karr and Michael DeAngelo.

and consolidated control over the Nile River Valley.¹⁴ However, the RSF prevented the SAF from advancing into Darfur and consolidated control of western Sudan by capturing SAF-held population centers in RSF territory it had besieged since the beginning of the war.¹⁵

Both sides are now setting conditions for a strategic battle in central Sudan (Figure 3).¹⁶ The current front lines largely center on the town of el Obeid, which is the SAF's central Sudan headquarters and main point of advance in central Sudan. RSF capture of el Obeid would put the SAF on the back foot and set conditions for the RSF to retake parts of the Nile River Valley and threaten Khartoum. An SAF counter-offensive breaking the RSF siege on el Obeid would open a clear path toward Darfur.

Somali Federal Tensions

Several regions in Somalia are operating as de facto autonomous regions, threatening Somalia's territorial integrity and causing a constitutional crisis that is fueling political violence (Figure 4). The breakaway Somaliland region in northern Somalia has been operating as a de facto independent state for decades. Jubbaland and Puntland states are not secessionist but separately suspended their ties with the Federal Government of Somalia (FGS) in 2024 and 2023, respectively, when the FGS began a constitutional and electoral reform process that the state governments rejected.

Somaliland

Somaliland has gained momentum in its quest for international recognition in recent years. Somaliland has operated as a de facto independent state since the fall of the Siad Barre regime in Somalia, in 1991, and instituted its own currency, government, and security forces.¹⁷ Somaliland's government is also responsible for services such as education, health care, identification, and infrastructure.¹⁸ Somaliland furthered its split from Somalia by reaffirming its de facto independence in a 2001 referendum and has implemented direct elections for its House of Representatives and president.¹⁹

Ethiopia considered recognizing Somaliland in 2024, and Israel became the first state to recognize Somaliland's independence in December 2025. Both moves sparked widespread backlash from the FGS and wider international community as a threat to Somalia's territorial sovereignty and unity.²⁰ The broader regional tug-of-war over Somaliland is discussed in greater depth later in the report.

Jubbaland and Puntland

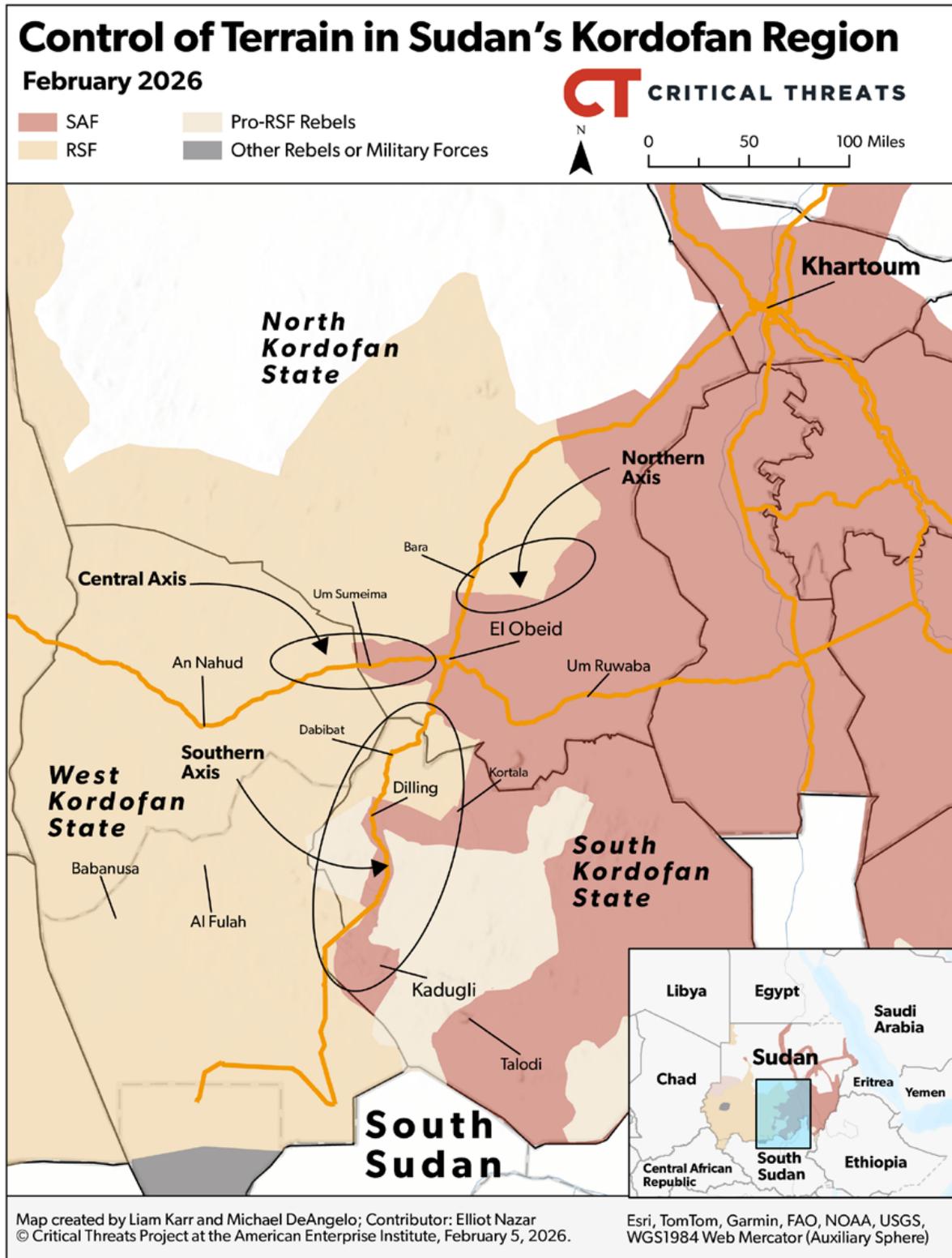
Jubbaland and Puntland have suspended ties with the FGS over FGS constitutional and electoral changes. Puntland is far removed from the epicenter of the al Qaeda-affiliated al Shabaab insurgency in southern Somalia and has functioned as an autonomous state since its founding, in 1998, but the state has maintained its membership in Somalia's federal system and institutions. However, Puntland declared in January 2023 that it would conduct its affairs like an independent state due to the FGS's constitutional reforms, which Puntland perceived as the FGS centralizing power.²¹ Puntland conditioned its reconciliation with the FGS on the completion of a permanent constitution and a consensus-based constitutional referendum.²²

The FGS pushed ahead with its constitutional reforms, including a shift to a direct election system, causing Puntland to formally withdraw from FGS institutions in March 2024.²³ Puntland had refused historically to recognize Somaliland, and the two regions have land disputes, but they signed security and trade cooperation agreements in 2025 that recognized Somaliland's right to self-determination.²⁴

Jubbaland has been at odds with the FGS over the same root election and federalism issues as Puntland. Jubbaland withdrew from the National Consultative Council—a key decision-making body comprising the Somali president, prime minister, and federal member state presidents to address federal issues—in October 2024 over the FGS's planned implementation of the direct election system.²⁵

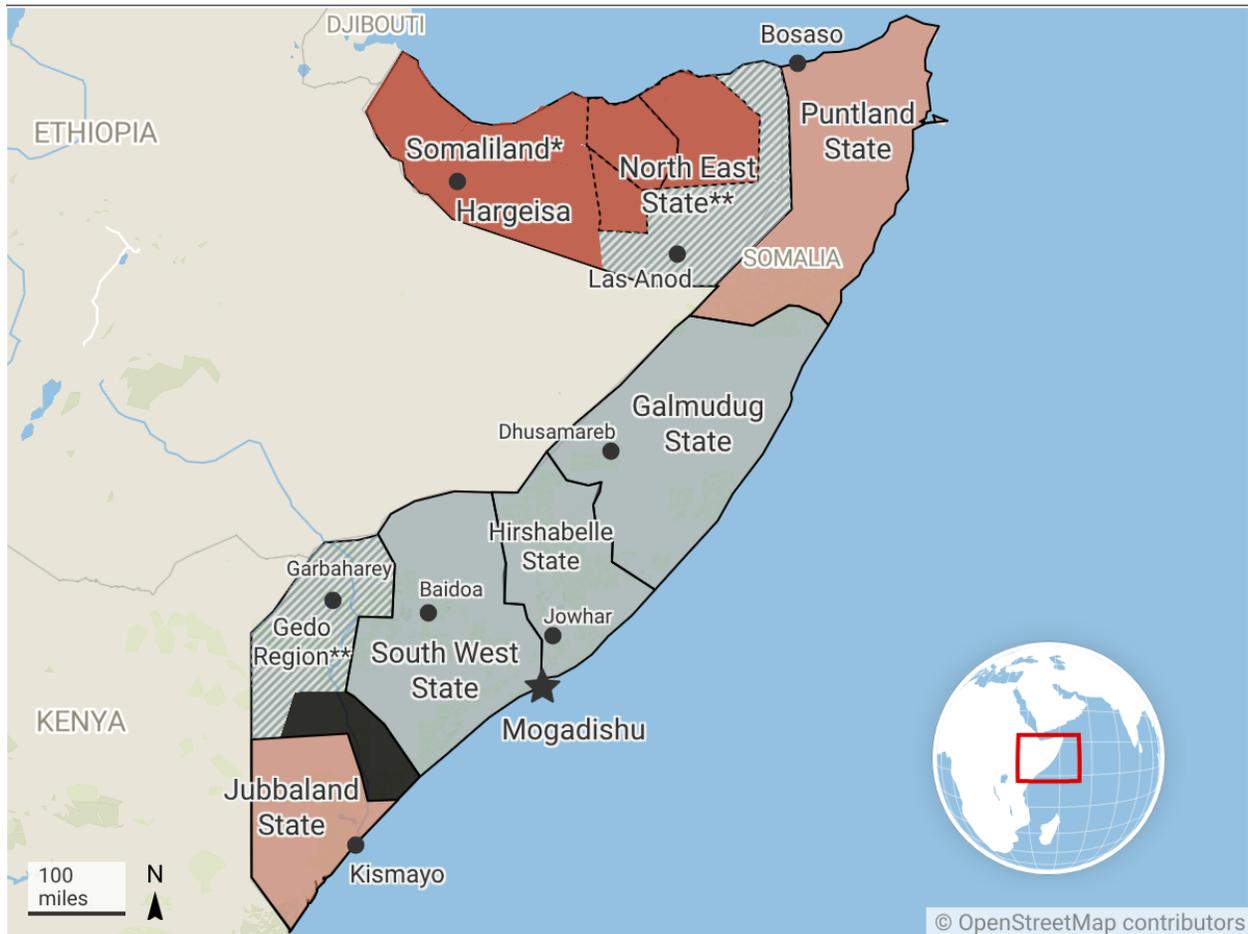
The dispute escalated when Jubbaland held state elections in November 2024 against the FGS's wishes.²⁶ The FGS deployed Somali forces to Jubbaland that clashed with state forces in late 2024

Figure 3. Control of Terrain in Sudan's Kordofan Region



Source: Liam Karr and Michael DeAngelo.

Figure 4. Somali States Align Against Mogadishu: Somali States Cut Formal Ties to the FGS



- Anti-FGS Regional Administrations
- Pro-FGS Regional Administrations
- Pro-FGS Administrations**
- AI Shabaab-Controlled Regions

Source: Liam Karr and Michael DeAngelo.

Note: * Somaliland is a de facto independent breakaway state. ** Areas under the de facto control of pro-FGS administrations but where anti-FGS regional governments claim jurisdiction. North East state’s de jure boundaries include areas with dashed boundaries, which are still under Somaliland control.

and mid-2025.²⁷ The FGS announced plans to create a parallel Jubbaland administration in October 2025 in response to the continued impasse.²⁸ Jubbaland responded by amending its constitution to refer to itself as a “state” rather than a “federal member state,” formally affirming its break from the FGS.²⁹

Jubbaland’s and Puntland’s objections to direct elections are fundamentally a power-sharing issue.

In Somalia’s clan-based quota parliamentary system, state legislatures and clan leaders select parliamentary representatives, who then elect the president.³⁰ A shift to direct one-person, one-vote presidential elections would upend this delicate balance by giving more voting power to larger clans and diminishing the leverage of smaller clans in parliamentary negotiations during presidential elections.

The dispute over direct elections has set conditions for a potentially violent constitutional crisis in 2026 amid approaching federal and presidential elections. Jubbaland and Puntland helped form the Somali Future Council—an anti-FGS political coalition with other members of the Somali opposition—in October 2025 to attempt to force the FGS into a consensus-based constitutional and election process.³¹ The coalition is planning its own roadmap for the upcoming elections, which raises the possibility of violence due to stalled elections, parallel elections, or an election boycott.³²

Ethiopian Federal Tensions

Armed ethno-nationalist movements across Ethiopia have long jeopardized Ethiopia's territorial integrity, and clashes with insurgents in the Amhara and Tigray regions in northern Ethiopia have intensified under Ethiopian Prime Minister Abiy Ahmed (Figure 5). Abiy—an ethnic Oromo—has centralized power since becoming head of state, in 2018. His ambitions sparked a brutal two-year war with the Tigray People's Liberation Front (TPLF) in 2020. The peace process that ended the Tigray war is now on the verge of collapse, and Abiy's efforts to assert greater control over regional forces unleashed another insurgency by the Fano—a loose collection of Amhara militias—in 2023. There are other armed ethno-nationalist movements across Ethiopia, but the disputes in Amhara and Tigray pose the biggest threat to Abiy's regime.

Tigray

The TPLF remains politically unincorporated, armed, and increasingly at an impasse with the Ethiopian federal government due to both sides' failures to implement the Pretoria peace agreement that ended the Tigray war in 2022. The TPLF is an ethno-nationalist paramilitary organization and political party that controlled Ethiopia's ruling coalition after taking power in 1991.³³ The TPLF-dominated Ethiopian government instituted a decentralized system of ethnic federalism, which nominally gave greater autonomy to ethnically-based regions and parties.³⁴

Abiy took power in 2018 amid popular backlash against perceived Tigrayan overreach—particularly

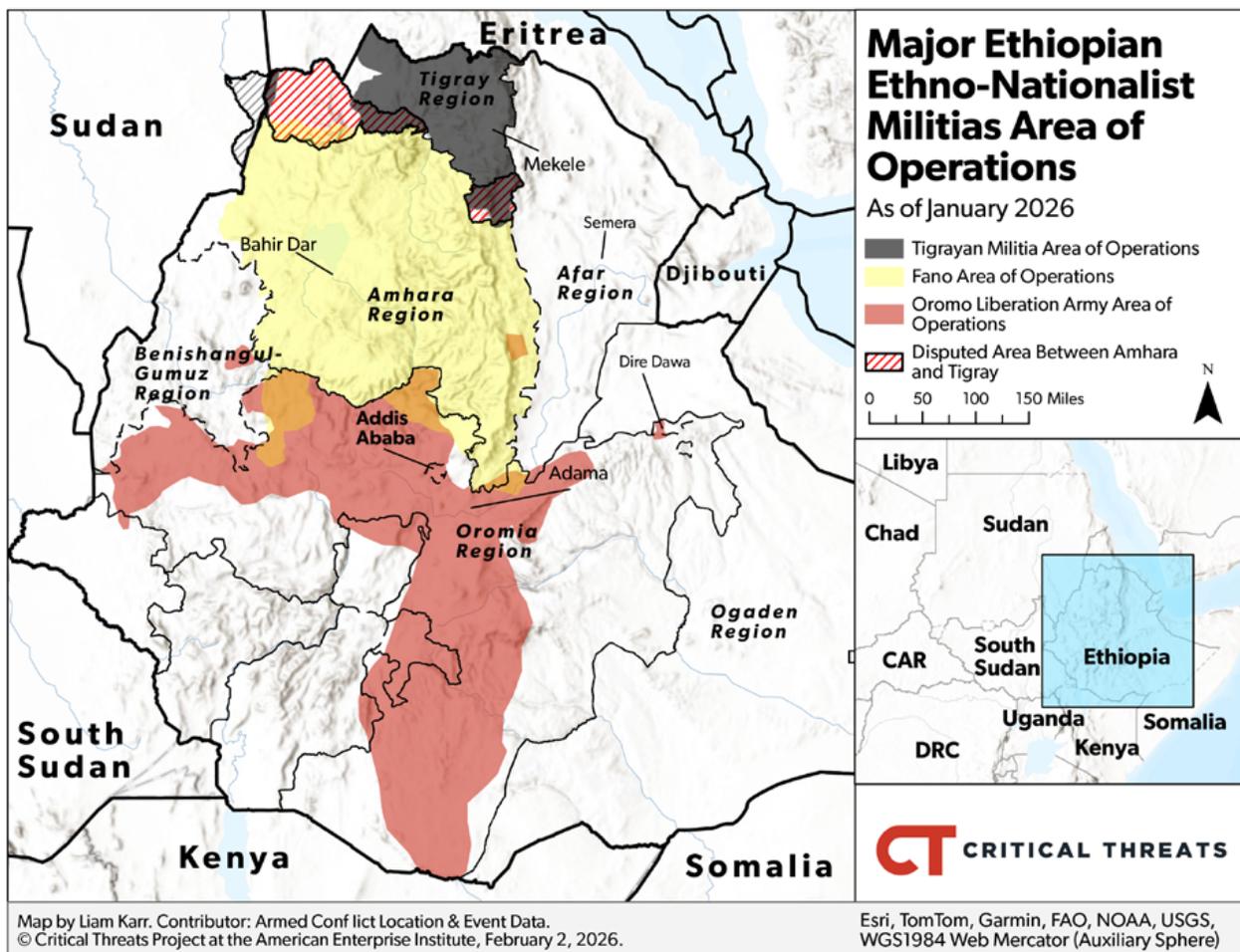
in the more populous Amhara and Oromia regions.³⁵ The new prime minister fueled growing unease among the TPLF as he eroded their federal system and isolated the group after taking charge. The tensions culminated in the outbreak of the Tigray war in November 2020 after a TPLF attack on an Ethiopian military base.³⁶ The federal government turned to Eritrea, Amhara regional forces, and Amhara ethno-nationalist Fano militias to form an alliance of convenience.³⁷ This coalition effectively won the war in 2022 but left festering tensions in its wake.

The Pretoria peace agreement aimed to solidify the federal government's control over Tigray in exchange for rebuilding the region and reinstating Tigrayan federal representation. The agreement stipulates that the federal government will be the only armed force and responsible for security in Tigray, requiring the withdrawal of anti-TPLF Amhara ethno-nationalist militants and Eritrean soldiers.³⁸ This includes the withdrawal of Amhara forces from areas that they had captured in long-disputed territories between Amhara and Tigray that lie in Tigray's *de jure* boundaries. The agreement tied the provision of humanitarian aid and the return of displaced people to the federal government's assumption of security.³⁹ Tigrayan forces also agreed to undertake a full-scale disarmament, demobilization, and reintegration program.⁴⁰

However, a lack of trust and will from both sides has obstructed the Pretoria agreement's implementation. Both parties have repeatedly accused each other of violations.⁴¹ Hardliners in the TPLF did not accept the agreement's terms after its signing, in 2022, and accused the federal government-backed Tigray Interim Administration (TIA) of doing the federal government's bidding at Tigray's expense.⁴² The federal government has been unable or unwilling to force Amhara or Eritrean forces to withdraw from Tigray, including the disputed territories, where their presence has prevented the return of one million displaced Tigrayans.⁴³ Tigrayan forces have cited this failure as the reason for not meeting demobilization targets.⁴⁴

A TPLF power grab in March 2025 effectively collapsed the Pretoria agreement and returned the region to the verge of war. Hardline TPLF factions executed

Figure 5. Major Ethiopian Ethno-Nationalist Militias Area of Operations



Source: Liam Karr.

a de facto coup against the TIA in March 2025, placing the Tigray region back under TPLF control.⁴⁵ The federal government had already been mobilizing forces in northern Ethiopia for a potential war with Tigray and neighboring Eritrea.⁴⁶ Tigrayan officials warned that all sides were in “final stages” of war preparations as the crisis unfolded and that a conflict seemed “inevitable.”⁴⁷ The federal government and TPLF have no institutional recourse to resolve the standoff after the federal government legally barred the TPLF from institutional power in May 2025, when it refused to recognize the TPLF’s status as a legal political party.⁴⁸

Tensions have continued to build, causing growing violence since late 2025. The TPLF reestablished a military command to coordinate between TPLF

leadership and pro-TPLF forces in June.⁴⁹ Pro-TPLF Tigrayan forces then attacked Tigrayan forces aligned with the ousted TIA government who were based in the neighboring Afar region in early November 2025, which was their first offensive action outside of Tigray since the war ended.⁵⁰

The Ethiopian federal government has escalated economic and military pressure on Tigray in response. The Ethiopian National Defense Forces (ENDF) conducted their first drone strike on Tigrayan forces since the war ended to repel the TPLF incursion into Afar in November.⁵¹ The federal government froze some Tigrayans’ bank accounts and halted budgetary support to the Tigray regional administration in late 2025, and the TPLF has accused the federal government

of obstructing fuel shipments to Tigray.⁵² Tigrayan security forces attacked regional administration facilities in early December due to salary withholding, underscoring how the pseudo blockade is destabilizing Tigray.⁵³

Tigrayan forces proceeded to launch an offensive to push the ENDF and Amhara forces out of the Amhara-held disputed areas in late January 2026.⁵⁴ The head of the TPLF-controlled Tigray regional administration said continuing issues over the Pretoria agreement's implementation caused the outbreak of violence.⁵⁵ The ENDF responded by conducting drone strikes against pro-TPLF forces in Tigray.⁵⁶ These clashes were the first large-scale engagements between federal and Tigrayan forces since the Tigray war ended.⁵⁷

Amhara

The federal government excluded its ethno-nationalist Amhara allies from the Tigray peace process and sought to consolidate greater control over these militants, who responded by launching a new insurgency in Amhara region in 2023 (Figure 6). Fano is a decentralized, fractious group of Amhara militias who lack a unified strategic goal and until recently lacked a centralized leadership, although the militias share grievances against the federal government.⁵⁸ Fano members disapproved of the Pretoria peace process because it did not protect Amhara land claims in Tigray or address Tigrayan abuses against Amhara during the war.⁵⁹

The federal government then disbanded Amhara regional forces as part of a broader centralization of federal power, which drove former soldiers to join Fano.⁶⁰ Fano factions began their insurgency in April 2023 and attacked several urban centers by August.⁶¹ ENDF counteroffensives temporarily reduced Fano activity, but militants reconstituted to launch a sustained offensive in July 2024, which temporarily captured multiple key roads by late 2024.⁶²

Fano has continued to strengthen its capabilities and cohesion, which has allowed it to conduct larger and more effective offensives since mid-2025. Four Fano militias active across Amhara region merged into the Amhara Fano National Force (AFNF) in

May.⁶³ The AFNF launched an offensive in eastern Amhara in August 2025.⁶⁴ The offensive made August to October 2025 the most active three-month period of the Fano insurgency thus far, and Fano factions sustained an elevated rate of activity even after the offensive ended.⁶⁵ The AFNF and Amhara Fano Peace Organization—the two strongest Fano coalitions—then unified under a joint military and political command in mid-January 2026 after months of talks, rebranding as the Amhara Fano National Movement.⁶⁶

Ethiopian Sea Access

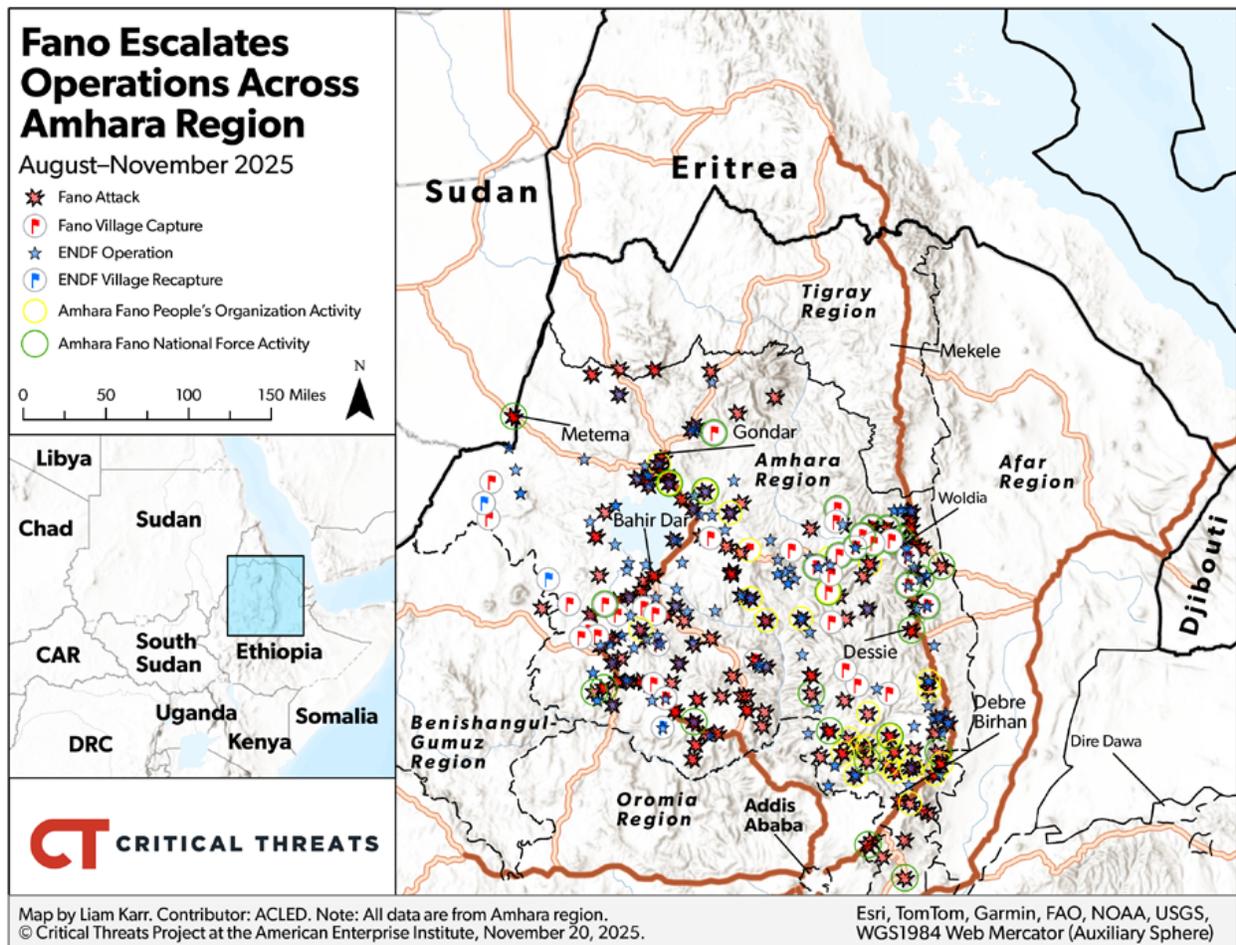
Abiy is aggressively pursuing Ethiopian sovereign sea access, implicitly and even explicitly threatening neighboring littoral states (Figure 7). Abiy has labeled sovereign sea access a right and an existential issue for Ethiopia, and Ethiopian officials have not fully ruled out the use of force if Ethiopia cannot acquire access diplomatically.⁶⁷ Abiy has cited Ethiopia's increasing regional prominence and growing population as grounds for access and compared the country's landlocked nature to a "geographic prison."⁶⁸ The Ethiopian government has argued that its reliance on Doraleh port in Djibouti and lack of direct access has unfairly exposed it to crime, espionage, piracy, and terrorism, with no recourse to protect its interests.⁶⁹ Ethiopia has explicitly called for direct naval access to strengthen its role as a "regional security anchor" in the Horn of Africa.⁷⁰

Djibouti

Djibouti is heavily reliant on Ethiopian trade, which makes Ethiopian sea access a major economic threat to Djibouti. Ethiopia relies on Djibouti for over 95 percent of its imports and exports and pays Djibouti roughly \$1.5 billion annually in port fees.⁷¹ Those fees alone equate to roughly one-third of Djibouti's entire GDP.⁷² Alternative Ethiopian access in Somaliland, for example, could deny Djibouti nearly a third of Ethiopian trade.

Ethiopia has aimed since 2010 to reduce its dependency on Djibouti and shift at least 30 percent of shipments to the Port of Berbera in Somaliland, although a lack of infrastructure in Berbera and between Ethiopia and Berbera has slowed these plans.⁷³ Berbera

Figure 6. Fano Escalates Operations Across Amhara Region



Source: Liam Karr; and Armed Conflict Location & Event Data, Data Export Tool, <https://acleddata.com/conflict-data/data-export-tool>.

aims to attract 500,000 tons of cargo—roughly one-third of the throughput at the main Djiboutian port at Doraleh.⁷⁴ The Emirati port managers at Berbera have said they aim for two-thirds of all Berbera's port traffic to be related to Ethiopia.⁷⁵ Djibouti offered Ethiopia the opportunity to co-manage a new commercial port of Tadjoura as an alternative to Somaliland in 2024.⁷⁶

Somalia and Somaliland

Ethiopia attempted to secure commercial and naval access via Somaliland as part of a port-for-recognition deal in January 2024, although Abiy shelved the agreement after significant Somali backlash and international pressure. The memorandum of understanding

(MOU) granted Ethiopia a 50-year lease to a portion of Somaliland's coastline for commercial and military use in exchange for recognizing Somaliland statehood and giving Somaliland a stake in Ethiopian Airlines, although Ethiopian officials said they agreed only to "consider" Somaliland recognition.⁷⁷

Somalia denounced the deal immediately as a violation of its sovereignty, expelled Ethiopia's ambassador, and closed Ethiopian consulates in northern Somalia.⁷⁸ The FGS rallied diplomatic pressure against Ethiopia, as the African Union (AU) and Arab League opposed the deal publicly, and Egypt said that it would protect Somalia's sovereignty.⁷⁹ The United States likewise disapproved due to concerns that the domestic reaction in Somalia would strengthen al

Shabaab and reportedly pressured Abiy to reconcile with Somalia.⁸⁰

Turkey mediated a compromise between Ethiopia and Somalia in December 2024 to secure peaceful Ethiopian commercial access via southern Somalia, but the agreement did not address Abiy's naval ambitions and has likely collapsed due to practical obstacles. The deal did not address the feasibility of ensuring safe passage for Ethiopian trade from Somali ports, given the presence of al Shabaab in port racketeering networks and significant swaths of southern Somalia. These challenges had contributed to the failure of a similar deal in 2018. The agreement's timeline stipulated that Ethiopia and Somalia would begin negotiations by February 2025 and sign a deal by June.⁸¹ The first round of negotiations happened in mid-February 2025, but none of the parties have reported any further negotiations, amid reports that the two sides could not reach a technical agreement on a port outlet.⁸²

Eritrea

Abiy and Ethiopian officials have implicitly threatened to forcefully annex the port of Assab in Eritrea, rooting their argument in irredentist, nationalist appeals. Abiy has referred to Ethiopia's loss of Assab following Eritrean independence in 1993 as a "historic mistake" and erroneously claimed that Ethiopia never formally relinquished control of the port, despite the Ethiopian government recognizing Eritrea's independence referendum.⁸³

Abiy has publicly said that it is "only a matter of time" before Ethiopia regains access to Assab, and a senior Ethiopian defense ministry official said that Ethiopia has a "historical right" to Assab.⁸⁴ Abiy and other officials have since claimed that any access to Assab would be peaceful in response to international backlash, but Eritrean officials have called Ethiopian comments "reckless saber-rattling," and Ethiopian officials have alluded to the possibility of a conflict and reaffirmed Ethiopia's military readiness.⁸⁵ Eritrea initiated a nationwide military mobilization in February 2025 and deployed forces to the border with Ethiopia, which deployed its own forces to the border in March 2025.⁸⁶

The GERD

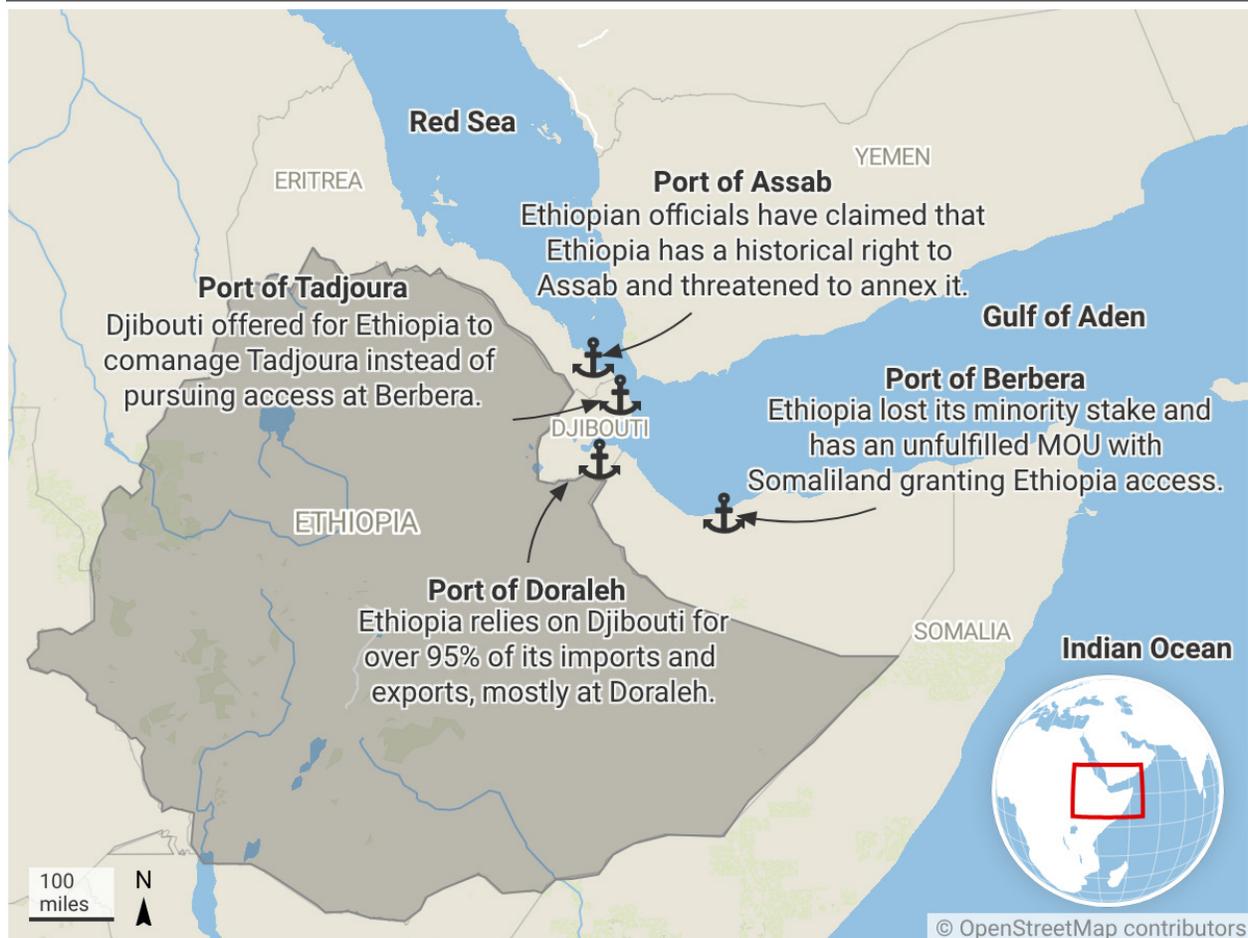
Ethiopia has sought to bolster its domestic and regional economic strength through the GERD, which the two downstream states, Egypt and Sudan, view as a major threat to their economic, food, and water security. Ethiopia began building the 5,000-megawatt GERD in April 2011 to boost Ethiopia's development and make Ethiopia an indispensable energy exporter in East Africa.⁸⁷ Ethiopian officials have continued to frame the GERD as both an expression of Ethiopian capabilities and sovereignty and a Pan-African achievement.⁸⁸ Ethiopia projects that the GERD will accelerate domestic development by doubling domestic electricity generation and significantly expanding electricity access.⁸⁹ Slogans at the GERD's inauguration in September 2025 also hailed Ethiopia's "geopolitical rise," explicitly tying the dam to Ethiopia's regional ambitions.⁹⁰

Egypt views the GERD as a possible existential threat.⁹¹ Approximately 97 percent of Egypt's water comes from the Nile, making the river vital for energy, household, and agricultural needs, the latter of which accounts for a notable share of Egypt's economy.⁹² Nearly 95 percent of Egypt's population lives within a few miles of the Nile.⁹³ Ethiopia could threaten Egypt's water access if it halted the movement of water through the GERD during drought periods, or it could cause downstream floods during the rainy season.

Egypt has even threatened military action if there is no progress toward a binding agreement on key water usage concerns regarding the Nile. Egypt reportedly threatened to bomb the GERD during its construction.⁹⁴ Egypt's foreign minister declared in early December 2025 that Egypt would not negotiate with Ethiopia anymore due to Ethiopia's alleged bad-faith calls and would have a "firm and decisive response" to any future dams.⁹⁵ However, Egyptian President Abdel Fattah el Sisi has since reaffirmed Egypt's desire for a negotiated settlement.⁹⁶

The SAF-controlled Sudanese government has supported Egypt's stance. Sudan has mutual interests with Egypt in upholding the 1959 Nile Waters Agreement, which guaranteed its access to a large share of the Nile River, but Sudan is better positioned than its

Figure 7. Ethiopia Attempts to Secure Sea Access: Ethiopian Officials Have Framed Access as an Existential Issue and Not Fully Ruled Out Using Force



Source: Michael DeAngelo.

Egyptian partners to benefit from GERD electricity exports and improved water management through coordination with Ethiopia.⁹⁷ Bashir supported the project, but subsequent Sudanese governments all sided largely with Egypt against Abiy.⁹⁸ Egyptian and Sudanese officials have released numerous bilateral statements in recent years underscoring their “unified” positions against Ethiopia’s unilateral filling and operationalization of the dam without an agreement.⁹⁹

Sudan’s GERD stance is partially due to its long-standing ties with Egypt and its separate tensions with Ethiopia. The SAF has ties with the Egyptian military from decades of joint officer-training

programs, training exercises, and high-level collaboration dating back to the 1970s.¹⁰⁰ Ethiopia and the SAF have a more tenuous relationship due in part to a long-running border dispute, which has led to clashes between Ethiopian and Sudanese troops as recently as October 2024.¹⁰¹

Geopolitical Dynamics

Most of these conflicts intersect with a broader regional competition between Ethiopia and Egypt for leadership in the Horn of Africa. Abiy has espoused a messianic worldview, filled with religious

self-conviction that he will lead Ethiopia to greatness.¹⁰² This outlook has led Abiy to claim that Ethiopia will be one of two world superpowers by 2050.¹⁰³

Abiy consolidated power internally through the Tigray war as a necessary first step and has moved toward channeling this power toward his regional ambitions after the war. His pursuit of sea access and operationalization of the GERD are two critical pieces of his effort to strengthen Ethiopia's regional economic and military influence. Egypt views a rising Ethiopia as a challenge to its historically dominant regional position in Horn affairs and has partnered with Ethiopia's neighbors, which feel threatened by Abiy's interest in their territory, to contain Ethiopia.

Ethiopia

Abiy spent the majority of his initial years in office centralizing power to project unrivaled power domestically and regionally.¹⁰⁴ Abiy's reforms have aimed to root out ethnic federalism and shift authority from traditional regional power brokers to the federal government.¹⁰⁵ Abiy dissolved the Ethiopian People's Revolutionary Democratic Front (EPRDF), the formerly TPLF-led ruling coalition composed of other ethnic-based parties, in late 2019 and merged factions from across Ethiopia into the broad-based Prosperity Party (PP).¹⁰⁶

The creation of a unitary political party formally co-opted the nominally autonomous regional governments under the federal government. The PP's national branch assumed authority from regional branches by choosing PP regional leadership and implementing direct elections for PP national leadership, whereas regional parties had decided these roles under the EPRDF's system.¹⁰⁷ The PP proceeded to win a supermajority in the Ethiopian parliament in the 2021 elections.¹⁰⁸

Abiy's efforts to consolidate power put the federal government at odds with the TPLF, culminating in 2020 in the devastating Tigray war. The TPLF rejected Abiy's changes to the system of ethnic federalism, called the dissolution of the EPRDF unconstitutional, and refused to join the PP.¹⁰⁹ Tensions between the federal government and TPLF increased when Abiy prosecuted Tigrayans as part of broader

anti-corruption efforts and replaced Tigrayan officials in the military. The TPLF called Abiy's delay of parliamentary elections from 2020 to 2021 during the COVID-19 pandemic unconstitutional and proceeded with regional elections against the demands of the federal government in September 2020.¹¹⁰ Both the federal government and TPLF mobilized forces amid the political standoff, leading to the outbreak of war in November 2020.¹¹¹

Abiy has continued to consolidate power since the end of the Tigray war. Abiy turned his focus to integrating regional forces under federal control and disarming militias to establish unchecked force beyond just Tigray. Brutal and indiscriminate counterinsurgency campaigns in Amhara and Oromia have involved extrajudicial executions.¹¹² Abiy has further ensured control of the system by reversing the brief opening of civic space from the beginning of his tenure to eliminate almost all dissent.¹¹³ The government has weaponized national security laws, such as emergency decrees and anti-terror laws, to harass reporters and nongovernmental organizations, arbitrarily arrest journalists and protestors, and detain prominent opposition figures.¹¹⁴ This crackdown has occurred amid a heavily controlled information space, in which government-imposed internet blackouts, high-tech surveillance, and disinformation campaigns are prevalent.¹¹⁵

Abiy is now pursuing a more assertive and dominant regional position after sidelining the TPLF and consolidating power domestically. Abiy first sought to gain commercial sea access in 2018 via Somalia, including Somaliland, but the failure of those deals partially shows that Abiy prioritized consolidating power over securing sea access at the time. The UAE brokered Ethiopia's rights to a commercial hub in Berbera and a minority ownership stake in the UAE's \$400 million Berbera port development project in exchange for Ethiopia investing \$80 million to develop roadways that would link Berbera to Ethiopian markets.¹¹⁶ Ethiopia and the FGS signed an agreement to develop four joint ports in southern Somalia later that year.¹¹⁷ However, Ethiopia never followed through on either deal amid economic reforms, ambitious projects in Addis Ababa, and the Tigray war.¹¹⁸

Abiy has shown that he is giving greater priority to the sea access issue by doubling down on sea access efforts in Somaliland and Eritrea since 2024. Abiy backed down from the 2024 Somaliland deal due only to widespread pressure, including from critical Ethiopian partners, such as Turkey, the United States, and the FGS, which threatened to end defense cooperation with Somaliland and jeopardize Ethiopia's ability to protect its border with Somalia from al Shabaab. However, Abiy continues to put out diplomatic feelers to find African partners to support Somaliland recognition, and he established a dedicated command post to coordinate and monitor activity related to Eritrea in September 2025.¹¹⁹

Abiy's continued insistence on naval access further signals his regional power projection ambitions. Abiy reestablished the disbanded Ethiopian navy in 2018 and signed training agreements with France in 2019 and Russia in 2025.¹²⁰ The Ethiopian navy has graduated trainees since 2023 and has almost completed its new headquarters near Addis Ababa.¹²¹ Ethiopian officials have argued that naval access would enable it to expand its role in regional security and multilateral cooperation on maritime issues in the Red Sea, including counterterrorism and piracy.¹²²

The Ethiopian government began constructing the GERD long before Abiy came to power, but he has taken a more assertive stance on operationalizing it. The TPLF-led Ethiopian government signed a declaration of principles on the GERD in 2015, in which Egypt, Ethiopia, and Sudan identified 10 key principles for future cooperation.¹²³ Abiy has violated several terms in the 2015 deal, including unilaterally filling and operationalizing the dam since 2020 and refusing to share data with downstream countries.¹²⁴ Abiy has also mirrored his nationalist rhetoric on Ethiopian port access, calling the GERD Ethiopia's sovereign right and refusing to negotiate any binding agreement on water releases.¹²⁵

The GERD plays a key role in Abiy's ambitions to place Ethiopia at the head of a rapidly developing Horn of Africa. Securing a stable power source helps Ethiopia industrialize and attract foreign investment. Ethiopia's energy capacity will increase its ability to support manufacturing, mining, tech, and other

energy-intensive industries and reduce the entry cost for foreign investors in these sectors.

Ethiopia's energy surplus will make Ethiopia a dominant regional energy provider. Ethiopia has signed bilateral agreements to export energy to South Sudan and is undertaking projects to construct power lines to link the Ethiopian and South Sudanese electric grids.¹²⁶ Ethiopia is already exporting energy to Djibouti and is constructing a second transmission line between the two countries.¹²⁷ Kenya has purchased Ethiopian energy since 2022 and was negotiating to increase imports in 2025.¹²⁸ Ethiopian government figures claim that GERD energy exports have the potential to generate \$1 billion in annual revenue.¹²⁹

Kenya and South Sudan maintain close ties with Ethiopia, partially because they face no threat from Ethiopia's GERD or sea access ambitions. Ethiopia cooperates on regional security challenges with both countries. Ethiopia and Kenya are major security partners due to the constant threat of al Shabaab from neighboring Somalia. The two countries signed an updated defense agreement in 2025 that enables intelligence sharing, joint training exercises, and collaboration in counterterrorism and border security.¹³⁰ Ethiopia is also a top contributor to the UN peacekeeping mission in South Sudan.¹³¹

Kenya and South Sudan are major economic partners with Ethiopia. The three countries are cooperating in the multibillion-dollar Lamu Port–South Sudan–Ethiopia Transport Corridor (LAPSSET) regional infrastructure project.¹³² LAPSSET includes a port, oil pipeline, roads, and railways connecting the three countries. South Sudan's instability has stalled LAPSSET, but Kenya has focused on resuming progress since late 2025.¹³³ Kenya and South Sudan have supported Ethiopia's operationalization of the GERD and are Ethiopian energy purchasers.¹³⁴ Kenya has been supportive of Ethiopia's sea interests and sought to mediate peaceful access.¹³⁵

Egypt Leads Regional Backlash

Egypt has led regional efforts among Djibouti, Eritrea, Somalia, and Sudan to contain Ethiopia. Egypt views Ethiopia as a threat to its historically dominant regional position in Horn affairs and specifically

regards the GERD as encroaching on its preferential access to the Nile River. Egypt has repeatedly demanded an updated tripartite agreement with Ethiopia and Sudan that would uphold Egypt's water access as specified in the 1959 agreement.¹³⁶ Ethiopia has accused Egypt of "not coming to terms with the realities of the 21st century" and clinging to a colonial-era mentality that gives Egypt a monopoly on the Nile.¹³⁷

Egypt also views Ethiopian sea access efforts as encroaching on another historically Egyptian-dominated domain—the Red Sea. Egyptian officials have repeatedly emphasized that landlocked countries should not have any influence on Red Sea governance and explicitly said that it is "unacceptable for Ethiopia to participate in any Red Sea governance framework."¹³⁸ An Ethiopian naval presence would create more points of leverage for Ethiopia, including opportunities for a developed Ethiopian navy to threaten Egypt's Red Sea rents.

Egypt has increased cooperation with Somalia to erode Ethiopia's highly influential role in the country, secure Somali support for Egypt's GERD stance, and deny Ethiopia Red Sea access. Egypt sent supplies and 1,000 troops to Somalia after the two signed a bilateral military agreement in August 2024, when Ethiopia-Somalia tensions over the Somaliland port deal were at their height.¹³⁹ Egypt and Somalia further bolstered bilateral relations in January 2025 and established a "comprehensive strategic partnership" across all domains.¹⁴⁰

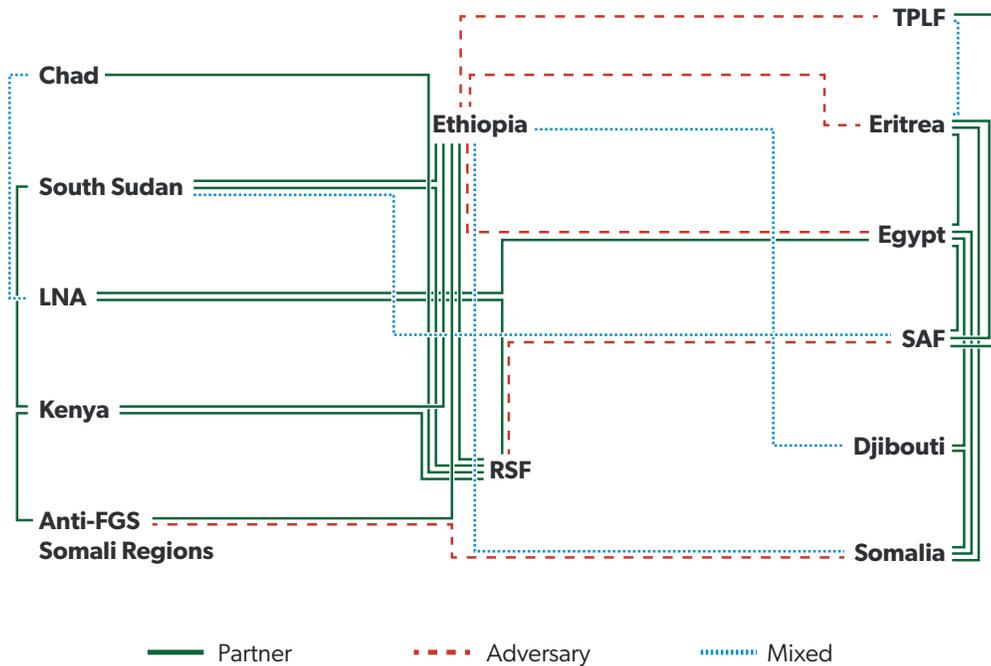
Egypt has increased cooperation with Djibouti since 2019 to contain Ethiopian influence and Red Sea ambitions. Djibouti has worked with Egypt to implement several energy, port development, and trade agreements to develop the port at Doraleh. The deals include a new container terminal, a joint solar power plant project to power the new terminal, and a logistics zone for Egyptian trade. Ethiopian outlets reported that the new container terminal would allow Egyptian naval vessels to refuel and resupply at Doraleh.¹⁴¹ Djibouti and Egypt have also repeatedly aligned their public positions that Red Sea governance should involve only littoral states.¹⁴²

Egypt has strengthened its bilateral ties with Eritrea, given their mutual alignment against Ethiopia. Sisi visited Eritrea for the first time in October 2024, and Egyptian and Eritrean officials held several subsequent high-level meetings to discuss economic cooperation and regional security issues throughout 2025, including a second meeting between the two presidents in October.¹⁴³ Emirati and Ethiopian sources reported that Egypt signed an agreement with Eritrea in late 2025 to upgrade the port infrastructure at Assab to enable Egyptian ships to refuel and resupply.¹⁴⁴

Increased alignment against Ethiopia has contributed to growing multilateral cooperation among these states more broadly. President Sisi, Eritrean President Isaias Afwerki, and Somali President Hassan Sheikh Mohamud held a summit in Eritrea in October 2024 to coordinate action on regional security issues.¹⁴⁵ The three countries committed to "advance strategic cooperation" through a trilateral committee, which amounts to a de facto anti-Ethiopia alliance.¹⁴⁶ The committee held its first meeting in Egypt in January 2025.¹⁴⁷ Djibouti, Egypt, Somalia, and Sudan signed a joint statement with 17 other countries condemning Israel when it recognized Somaliland in late 2025, while Ethiopia did not make any formal statement.¹⁴⁸

Djibouti, Eritrea, and Somalia have not fully supported Egypt's position on the GERD, however, which highlights the limited and tactical nature of the anti-Ethiopian coalition and regional efforts to balance between Egypt and Ethiopia. The Djiboutian and Somali presidents attended Abiy's inauguration of the GERD in September 2025.¹⁴⁹ President Isaias did not, but Eritrea has not commented on the GERD at all since 2013.¹⁵⁰ These countries are all either upstream or not in the Nile River Basin and are not willing to further strain ties with Ethiopia on the matter.

Somalia remains wary of Ethiopia's interest in Somaliland but has reestablished working diplomatic relations in other areas. Somalia renewed Ethiopia's participation in the AU Stabilization and Support Mission in Somalia (AUSSOM), which began in early 2025.¹⁵¹ Abiy and Mohamud met multiple times in 2025 to ease tensions and discuss cooperation on other issues.¹⁵² Mohamud emphasized the potential

Figure 8. African Partnerships in the Horn of Africa

Source: Liam Karr and Michael DeAngelo.

regional benefits of the GERD at the dam's inauguration.¹⁵³ Somali officials have also not participated in any multilateral meetings of the Egypt-Eritrea-Somalia "anti-Ethiopia" alliance since January 2025.¹⁵⁴ Ethiopian and Somali officials even met in January 2026 in the aftermath of Israel's recognition of Somaliland, signaling further efforts to manage tensions on the divisive issue.¹⁵⁵

Djibouti has cooperated with Ethiopia on the GERD and non-sea access issues due to its strategic reliance on its much larger neighbor. Djiboutian President Ismail Guelleh has "agreed" with Sisi on the need to peacefully resolve the GERD dispute, but Guelleh has not openly supported Egypt's negotiating position and praised the GERD as an African achievement when he attended the dam's inauguration.¹⁵⁶ Djibouti already imports 80 percent of its energy from Ethiopia and began constructing a second transmission line to connect to Ethiopia in November 2025.¹⁵⁷ Djiboutian and Ethiopian officials announced in 2024 that they planned to electrify the diesel pumps

currently powering the Ethiopia-Djibouti Water Pipeline, which would increase the supply of water to Djibouti from 20,000 to 100,000 cubic meters daily.¹⁵⁸

Conflict Regionalization

Regional competition has exacerbated and convoluted local conflicts. Ethiopia's efforts to gain sea access via Somaliland have naturally made Somaliland independence a regional issue, but African countries are also exploiting other federal tensions to increase their military influence in Somalia. Surrounding countries have similarly meddled in the conflicts in Ethiopia and Sudan to strengthen their regional position or weaken adversaries (Figure 8).

Support for Ethiopian Opposition Groups

Eritrea has intertwined Ethiopia's domestic conflicts with its regional dispute against Ethiopia by supporting Fano and the TPLF to undermine the

Ethiopian federal government. Abiy's rise to power seemed to reset Eritrean-Ethiopian relations, but their alliance of convenience against the TPLF has not lasted. The two neighbors have been fierce rivals since the mid-1990s—shortly after Eritrea officially gained independence with consent from the TPLF-dominated Ethiopian government in 1993. Economic tensions and border disputes led to the Eritrean-Ethiopian war in May 1998, and the two continued to militarize their shared border and support opposition groups to destabilize the other in the decades following a peace agreement in 2000.¹⁵⁹ The two neighbors reconciled after Abiy took power, but the 2022 Pretoria agreement excluded Eritrea as a signatory and left Eritrean security objectives unaddressed by leaving the TPLF intact.¹⁶⁰

Eritrea and the TPLF may now be cultivating the next unlikely alliance of convenience to balance against Abiy. Eritrea's and the TPLF's deteriorating relationships with the Ethiopian federal government have created space for rapprochement despite their long-running enmity and widespread Eritrean abuses against Tigrayans during the war.¹⁶¹

TPLF and Eritrean officials reportedly convened a high-level summit in January 2025 with President Isaias, who allegedly promised pro-TPLF forces protection in the event of a conflict with Ethiopia. Anonymous Western diplomatic sources claimed in January 2025 that there had been a noticeable rapprochement between TPLF factions and Eritrea that involved “at least some communication” and a series of meetings between the two sides in early 2025.¹⁶² The TPLF head attended the reopening of a border crossing between Eritrea and Tigray and declared intentions to strengthen ties with Eritrea in June 2025.¹⁶³

The suspected ties between Eritrea and the TPLF almost led to a direct military confrontation between Ethiopia and Eritrea in March 2025, when the TPLF ousted the federally backed Tigrayan Interim Administration. Senior TIA officials had warned in the days before the attacks that Eritrea and Ethiopia are in the “final stages” of preparations for war and that a conflict between the two sides—likely in Tigray—“seems”

inevitable.”¹⁶⁴ The ousted TIA leader accused “external forces” of supporting the armed seizures of government offices in Tigray.¹⁶⁵ The former US deputy special envoy for the Horn of Africa and the EU special representative for the Horn of Africa warned shortly after the power grab that “the speed and scale of mobilization and deployment on all sides” indicated an imminent conflict.¹⁶⁶

Eritrea and the TPLF may be coordinating to support Fano to counter the Ethiopian federal government. Ethiopia filed a complaint with the United Nations in early October 2025 that accused Eritrea and the TPLF of supporting Fano's offensive in eastern Amhara, and Ethiopian police claimed to seize thousands of rounds of Eritrean-provided ammunition from Fano in December 2025.¹⁶⁷ *The Economist* reported in November 2025 that representatives from Eritrea, Fano, and the TPLF met to discuss military collaboration “recently.” Ethiopian military officials even alleged that Eritrean forces and equipment shipments had infiltrated several parts of Tigray in early 2026.¹⁶⁸

Eritrea has previous ties with Fano, which it ironically trained to degrade the TPLF in disputed areas of western Tigray that border Eritrea.¹⁶⁹ TPLF support for Fano would be a reversal of their recent rivalry, given their hostilities during the Tigray war and long-standing land disputes.¹⁷⁰ Fano and Tigrayan officials have recently downplayed tensions, however, by leaving the possibility of cooperation open and portraying the Ethiopian federal government as the primary enemy.¹⁷¹

The SAF may be indirectly supporting Eritrea and the TPLF to weaken Ethiopia. *The Economist* reported that the meeting between Eritrea, Fano, and the TPLF in October 2025 took place in Sudan.¹⁷² The SAF has severe tensions with Fano related to the role of Amhara militants in its ongoing border dispute with Ethiopia, but the TPLF and SAF have a much more positive relationship.¹⁷³ The SAF allowed the TPLF to use Sudanese territory as a rear base and supplied weapons to the TPLF during the Tigray war.¹⁷⁴ Pro-TPLF soldiers have also fought alongside the SAF in parts of eastern Sudan during the ongoing civil war.¹⁷⁵

Backing Sudanese Factions

Egypt, Eritrea, and Ethiopia have all meddled to varying degrees in the Sudanese civil war to improve their regional position. Egypt has been one of the main military and political backers of the SAF in the ongoing civil war, partially because it views the SAF as a reliable regional partner on Egypt's core interests—an authoritarian and stable Sudan that takes Cairo's side on the GERD and other regional issues.

Egypt has trained SAF pilots and sent weapons, including Turkish drones and possibly fighter jets, since the beginning of the war.¹⁷⁶ Egypt escalated its support after the RSF captured el Fasher in October 2025, establishing joint operations centers with the SAF and coordinating airstrikes and drone strikes with Turkey and the SAF from Egyptian territory against RSF supply lines near the Egyptian border.¹⁷⁷ Egyptian officials have repeatedly emphasized since late 2025 that they will accept a postwar government only if it preserves the SAF as an institution and Sudan's territorial unity.¹⁷⁸

Eritrea has sought to strengthen its influence on Ethiopia's border by serving as an SAF rear base and trafficking hub. Pro-SAF militias from eastern Sudan have established training camps inside Eritrea, and Eritrea allowed the SAF to relocate aircraft to Eritrea in mid-2025 so that the planes were out of range of RSF drones.¹⁷⁹ Flight radar shows that Eritrea has served as a likely weapons trafficking hub for shipments to Sudan, with some reports stating that anti-aircraft weapons, barrel bombs, spare aircraft parts, and Turkish and Iranian drones have transited to Sudan via Eritrea.¹⁸⁰ The SAF-backed government signed agreements to increase economic and unspecified defense cooperation with Eritrea in October 2025.¹⁸¹

Ethiopia initially tried to balance between the RSF and SAF, but Abiy likely began allowing the RSF to use Ethiopian territory as a rear base and trafficking hub in late 2025. Sudanese officials have claimed that an increase in Emirati weapons shipments to Ethiopia since November 2025 is for a new RSF rear base in Ethiopia.¹⁸² Open-source analysts have tracked some of these shipments to a town near the Ethiopian border with Sudan, near an area where satellite imagery shows a likely RSF camp.¹⁸³

Kenya has given tacit diplomatic support to the RSF as part of Kenya's efforts to strengthen its role as a regional mediator. Kenya hosted the RSF's summit with allied militia and political groups to launch their parallel government in February 2025.¹⁸⁴ The decision drew criticism from the SAF, UN, and US, among other entities.¹⁸⁵

The Sudanese civil war is exacerbating tensions across the border in South Sudan, which has been on the verge of its own civil war since early 2025. A fragile 2018 power-sharing deal between the Dinka and Nuer ethnic groups broke down in March 2025, when forces loyal to Nuer Vice President Riek Machar attacked government forces loyal to Dinka President Salva Kiir.¹⁸⁶ Kiir arrested and charged Machar and several of his allies for treason and removed other Nuer leaders from their positions.¹⁸⁷ Low-level fighting fluctuated in parts of the country throughout 2025, and opposition Nuer forces launched a major offensive in late 2025 into early 2026, affirming warnings from the UN and others that the continued dismantling of the 2018 power-sharing deal risked sparking a full-blown civil war.¹⁸⁸

The South Sudanese government has tried to balance between the RSF and SAF due to its economic reliance on oil exports via Sudan, which the Sudanese civil war has jeopardized. Oil exports through pipelines that run through Sudan account for 90 percent of the South Sudanese government's revenue.¹⁸⁹ The United Nations reported that South Sudan's oil exports had fallen by 70 percent in 2024 and that RSF attacks halted operations at Heglig—a primary transit point—multiple times in 2025.¹⁹⁰ South Sudan's economy contracted by almost 25 percent in fiscal year 2025, and the ensuing hyperinflation brought the country's poverty rate to over 90 percent by pushing three million additional people below the poverty line.¹⁹¹

President Kiir's refusal to crack down on RSF rear basing and trafficking through South Sudan strained the relationship between the SAF and the South Sudanese government throughout 2025. The RSF formed an alliance with a Kiir-aligned rebel group in Sudan in 2024.¹⁹² The RSF and aligned militias rely on supply corridors running through South Sudan for fuel and have established camps near the South Sudan–Sudan border.¹⁹³ SAF officials have accused South Sudan of

failing to stop RSF recruitment and movement on the border.¹⁹⁴ South Sudan and the RSF have worked together to reopen the Heglig oilfields under the security of the South Sudanese military since the RSF captured the area in early December 2025, although there have been tensions with South Sudanese personnel over the RSF's continued presence.¹⁹⁵

Vying for Influence in Somalia

Egypt, Ethiopia, and Kenya have weaponized Somali federal tensions to strengthen their military influence in Somalia. The FGS's constitutional and electoral reforms threaten to shift some influence away from the federal member states (FMSs), which Ethiopia and Kenya use as a tool to protect their interests in Somalia.¹⁹⁶ Ethiopia and Kenya have long-standing ties with Jubbaland, for example, to externalize their borders against al Shabaab irrespective of bilateral tensions or internal issues with the FGS. Both countries have objected to the FGS's efforts to create a rival Jubbaland administration as a result.¹⁹⁷ Kenya hosted Puntland and Somaliland officials when they agreed to increase cooperation in October 2025 and hosted the Somali opposition later that month as they

launched their coalition.¹⁹⁸ This stance has possibly contributed to Kenya joining Ethiopia as one of the few countries that did not denounce Israel's recognition of Somaliland.

Egypt has capitalized on the Somali government's apprehension over FMS external ties—at Ethiopia's expense—to position itself as an alternative counterterrorism partner who will respect Somali sovereignty. President Mohamud threatened to expel the roughly 10,000 Ethiopian troops stationed in Somalia via bilateral cooperation and the AU peacekeeping mission if Ethiopia established a naval base in Somaliland in 2024.¹⁹⁹ Mohamud never followed through on the threat, but he did pivot to Egypt, which agreed in August 2024 to join the AUSSOM peacekeeping mission when it began in January 2025.²⁰⁰

AUSSOM allocated space for 1,091 Egyptian soldiers, but they have not yet deployed.²⁰¹ Somali media have sporadically reported that President Mohamud would use Egyptian troops to crack down on rogue local governments.²⁰² Ethiopia views Egypt's military presence on its borders as a national security risk and warned against Egyptian military participation in AUSSOM in 2024.²⁰³

II. Middle Powers

Gulf State Objectives in Africa

The Gulf states see Africa as a strategically vital theater that is key to addressing existential concerns related to economic, food, and regime security. Africa is a key part of Gulf state plans to gradually diversify their energy investments and economies to avoid overreliance on fossil fuels. African countries and the Gulf states view a rapid transition away from fossil fuels as unrealistic, but both groupings are still seeking to diversify their energy mixes.²⁰⁴

These shared energy interests have created opportunities for continued fossil fuel trade and quickly expanding green energy investments (Figure 9). The UAE invested \$70 billion in renewable energy projects between 2019 and 2023 and was negotiating deals to invest more than \$6 billion in African oil and gas projects as of May 2025.²⁰⁵ Saudi Arabia has similarly invested billions into oil, gas, and renewables, including newly announced multibillion-dollar joint investments in oil and gas with Algeria and renewables with the African Development Bank.²⁰⁶ Qatar is more heavily focused on liquefied natural gas (LNG) than on oil or green energy, given its dominance in the gas sector and LNG's longer phaseout horizon compared with oil.²⁰⁷

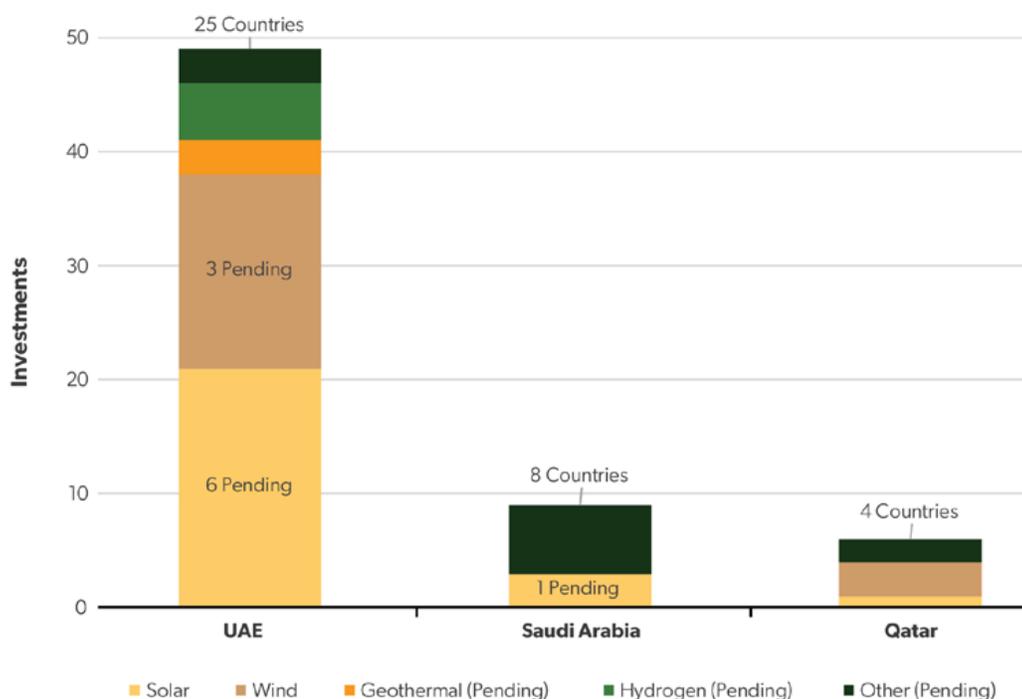
The Gulf countries, which import 80–90 percent of their food, view Africa as essential to their food security. These countries have diversified import sources and developed strategic food reserves to avoid overreliance on a single source and bolster their

resilience to unexpected shocks.²⁰⁸ Part of the diversification effort has involved major investments in agriculture in Africa, which hosts at least 60 percent of the world's uncultivated arable land (Figure 10).²⁰⁹ The UAE has led the way in terms of purchasing African agricultural land, but Qatar and Saudi Arabia have recently announced multibillion-dollar flagship projects and are growing agriculture ties with several African countries.²¹⁰

Saudi Arabia and the UAE have invested significant resources into containing Islamism in Africa, while Qatar has backed Islamist parties to expand its political influence. The Gulf monarchies view the revolutionary and populist nature of political Islam as a fundamental threat to their hereditary rule and state-managed religious institutions. Saudi Arabia and the UAE allied to support counterrevolutionary movements throughout the Arab Spring and crack down on Islamist activities domestically. Qatar has decades-long ties with Islamist movements and sought to support Islamist movements in Africa to strengthen its geopolitical influence, but it has reduced overt support in recent years to alleviate the fears of its Gulf neighbors.²¹¹

Gulf states view the Horn of Africa as critical to Red Sea security, which is inextricably linked to these various objectives. Africa grants the Gulf states strategic depth to address malign actors that threaten the Arabian Peninsula and prevent regional instability from jeopardizing vital maritime trade routes. The UAE has been a major security partner in the Horn of Africa

Figure 9. Gulf State Energy Investments in Africa



Source: Authors' research; and Maddalena Procopio and Corrado Čok, *Diversification Nations: The Gulf Way to Engage with Africa*, European Council on Foreign Relations, March 24, 2025, <https://ecfr.eu/publication/diversification-nations-the-gulf-way-to-engage-with-africa/>.

to develop strategic depth to support counterterrorism efforts against ISIS and al Qaeda and address Red Sea maritime security threats, such as piracy or the Iranian-backed Yemeni Houthis.²¹²

The UAE: Looking Outward

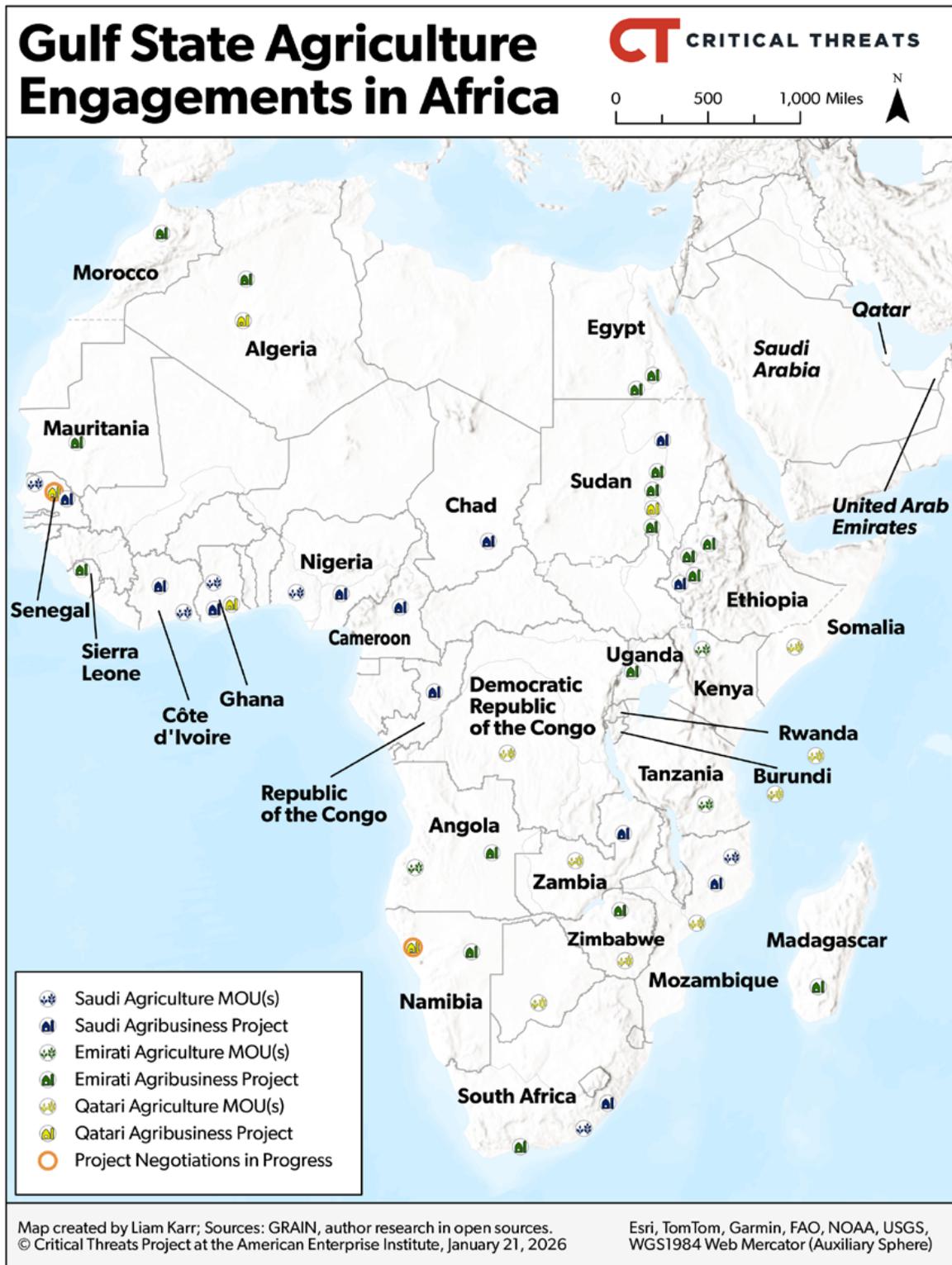
The UAE has focused on foreign investment and positioning itself as a trade hub to diversify its economy, and Africa is a major part of its global trade network (Figure 11). The UAE's small size means it must invest abroad more aggressively to secure revenue. The Emirati port firms DP World and Abu Dhabi Ports constructed, began constructing, or signed agreements to develop 15 ports, "dry ports," and other logistics platforms between 2006 and 2021 and a further six since the beginning of 2022.²¹³ The UAE operates or will operate 15 of these platforms. Trade between the UAE and Africa currently accounts for nearly 15 percent of the UAE's total trade and has grown significantly in recent decades—from \$37 billion in 2012 to around

\$100 billion by 2025.²¹⁴ The battle for ports ties into food concerns, as ports give Gulf states greater access to and control over global food networks.²¹⁵

A key part of the Emirati economic vision is controlling the critical minerals trade, especially gold (Figure 12).²¹⁶ Substantial growth in mineral trade has driven the overall growth in UAE-Africa trade, as annual non-oil minerals overtook all other trade combined in 2016 and continued to compose a growing share of Africa-UAE trade in the years since.²¹⁷ Legal and illicit gold dominate this mineral trade, which supports the UAE's gold refining business and gold reserves. The UAE imported \$34.5 billion of African gold in 2022—roughly 7 percent of its GDP that year.²¹⁸ The UAE imported a further \$115.3 billion in African gold that had not legally been declared for export between 2012 and 2022.²¹⁹

The UAE has been the most aggressive purchaser of African agricultural land. The UAE has at least 56 land agreements in Africa. Most deals involve

Figure 10. Gulf State Agriculture Investments in Africa

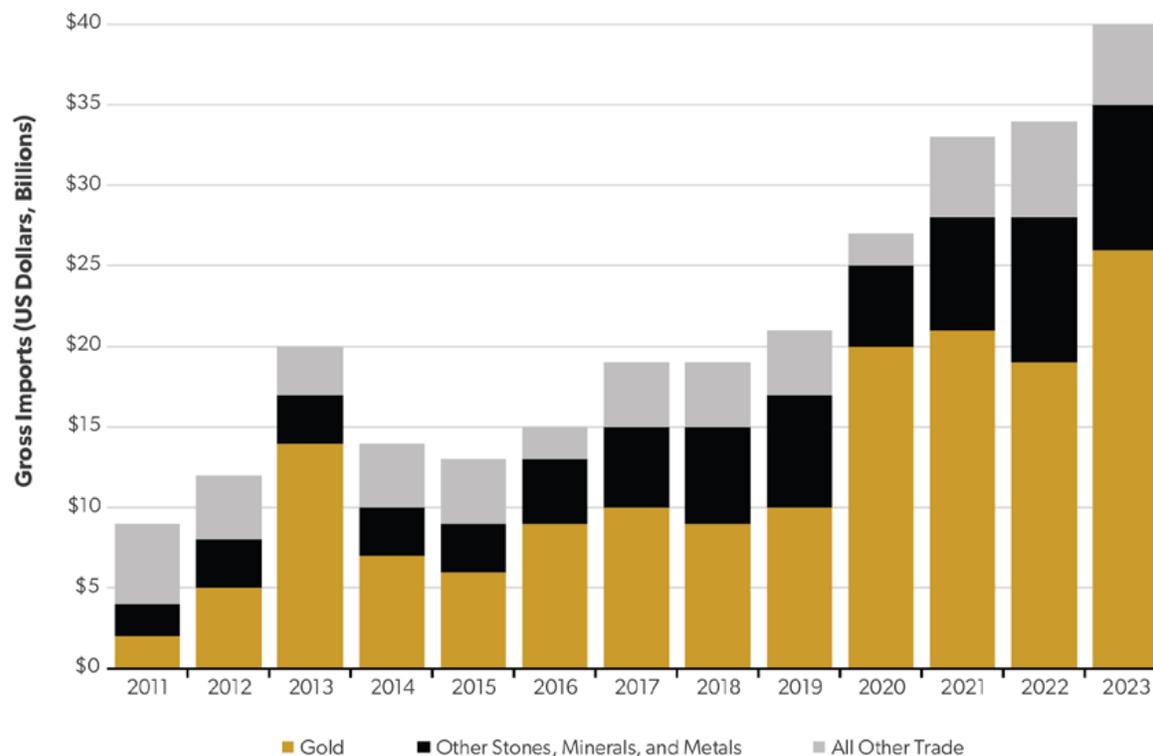


Source: Authors' research; and GRAIN, *From Land to Logistics: UAE's Growing Power in the Global Food System*, July 3, 2024, <https://grain.org/e/7170>.

Figure 11. Emirati Engagement with Africa



Source: Liam Karr; and authors' research.

Figure 12. Gold Drives Growing African Exports to the UAE

Source: Harvard Kennedy School, Growth Lab, Atlas of Economic Complexity, <https://atlas.hks.harvard.edu/>.

farmland for agricultural purposes or forests for carbon offset credits.²²⁰ Emirati companies own farmland in at least 12 African countries: Algeria, Angola, Egypt, Ethiopia, Madagascar, Mauritania, Morocco, Sierra Leone, South Africa, Sudan, Uganda, and Zimbabwe.²²¹

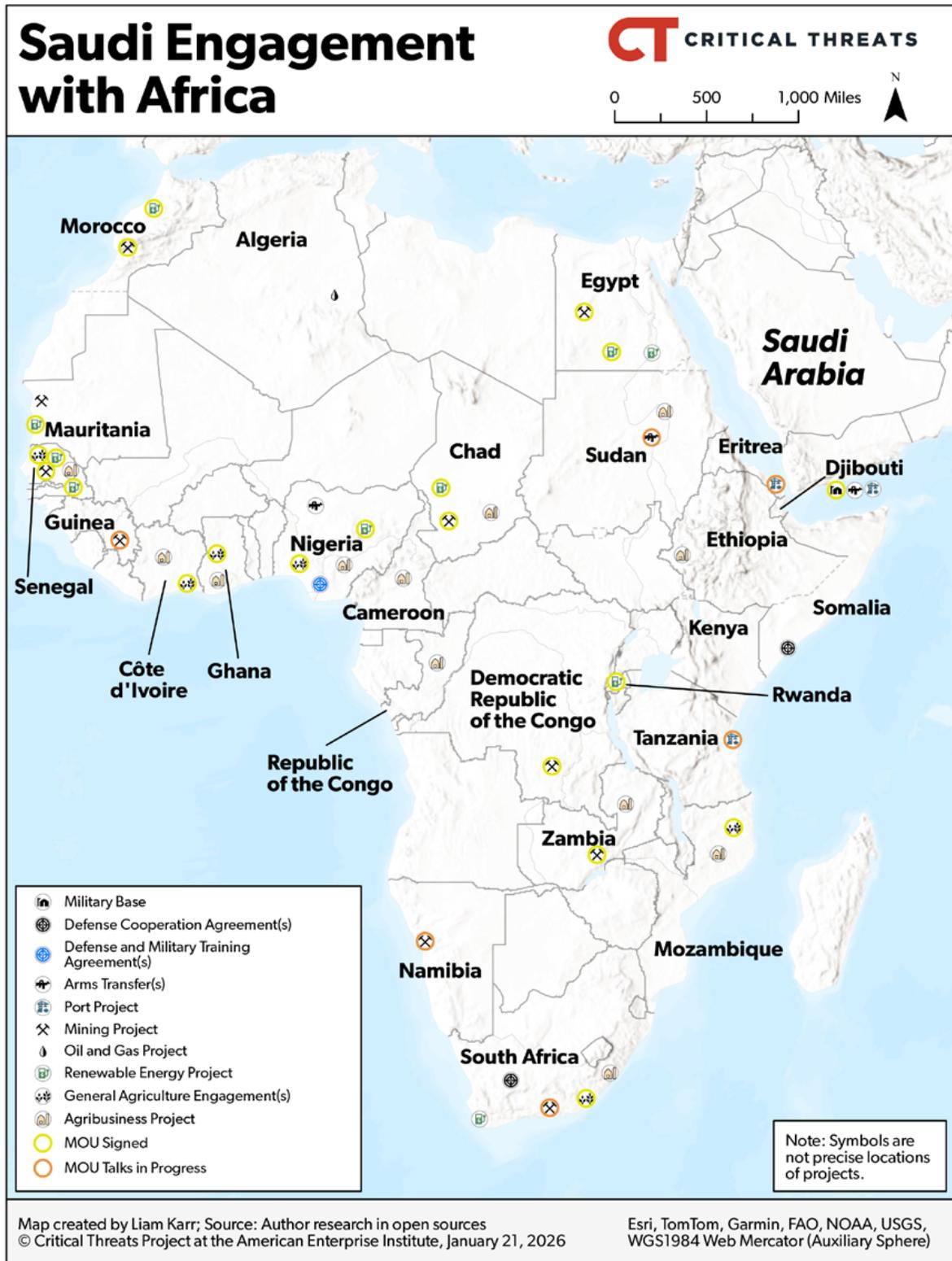
Saudi Arabia: Focusing Inward

Saudi Arabia has prioritized domestic investment to diversify its economy, but Africa still plays an important role in the kingdom’s plans to strengthen domestic manufacturing, technology, and tourism (Figure 13). Regional stability across the Red Sea is essential to attract the foreign investors and tourists that the kingdom’s economic diversification plan requires.²²² Most Saudi “Giga-Projects”—massive initiatives to build luxurious tech cities,

such as the Neom project—are along Saudi Arabia’s Red Sea coastline.²²³

Saudi investments in African mining aim to secure the necessary supply chains to develop Saudi Arabia’s domestic green energy manufacturing, artificial intelligence, data, and technology sectors as part of its Vision 2030 agenda.²²⁴ Saudi Arabia announced in 2023 that it would purchase \$15 billion in global mining stakes from multiple African countries to increase the critical mineral supply for domestic processing and manufacturing.²²⁵ Saudi and US officials have discussed pursuing African minerals as part of their joint minerals partnership.²²⁶ Saudi Arabia announced plans for a mineral “super region” from central Asia to Africa via Saudi Arabia during the 2024 Future Minerals Forum in Riyadh, drawing comparisons to China’s Belt and Road Initiative.²²⁷

Figure 13. Saudi Engagement with Africa



Source: Liam Karr; and authors' research.

Qatar: A More Conservative Outlook

Qatar has pursued a narrower approach that leverages soft-power influence to guide select investments, as it faces a less pressing need to diversify its economy and is smaller than its Gulf peers (Figure 14). Qatar's economy is much more reliant on gas than on oil, which faces a much longer—and therefore less urgent—transition timeline.²²⁸ Qatar has used soft power, particularly its emphasis on mediation, to help guide its more selective engagement in Africa. Qatari mediation efforts over conflicts in Sudan, Somalia, and the Democratic Republic of the Congo (DRC) have cultivated partnerships and shaped Qatari engagement over the past several decades. Qatar also prefers to secure stakes in joint projects to mitigate risk. An exception to these trends is Qatar's plan to buy and export produce from Ghana as part of a \$1.5 billion large-scale farming project.²²⁹

Qatar has focused much of its latest investment in central and southern Africa, where competition with its Gulf neighbors is less intense, and it has assumed a bigger role in mediating the eastern DRC conflict. This investment includes Qatar Airways securing a 60 percent stake in a \$1.3 billion project in Rwanda in 2019 that aims to construct a new airport and position Rwanda as Africa's leading aviation hub.²³⁰ Qatar is a comparatively smaller player in the critical minerals sector than its Gulf neighbors but announced \$103 billion of new investments in 2025 to secure stakes in joint projects, all of which are in central and southern Africa.²³¹ The investments target multiple sectors, with agriculture, energy, infrastructure, and mining the most prominently featured.²³²

Turkish Interests and Approaches in Africa

Turkish President Recep Tayyip Erdoğan views Africa as a key theater for his ambitions to make Turkey a regional leader and to strengthen his domestic position (Figure 15). Turkish partnerships in Africa strengthen Turkey's stature as a leading alternative to great powers. Turkey has sought to brand its engagement with Africa as an alternative to China and the West. The "Ankara consensus" combines the soft-power aspects of Western engagement and the state-led investment of Chinese engagement without enforcing

preconditions or creating dependence, which are criticisms that China and the West face in Africa.²³³

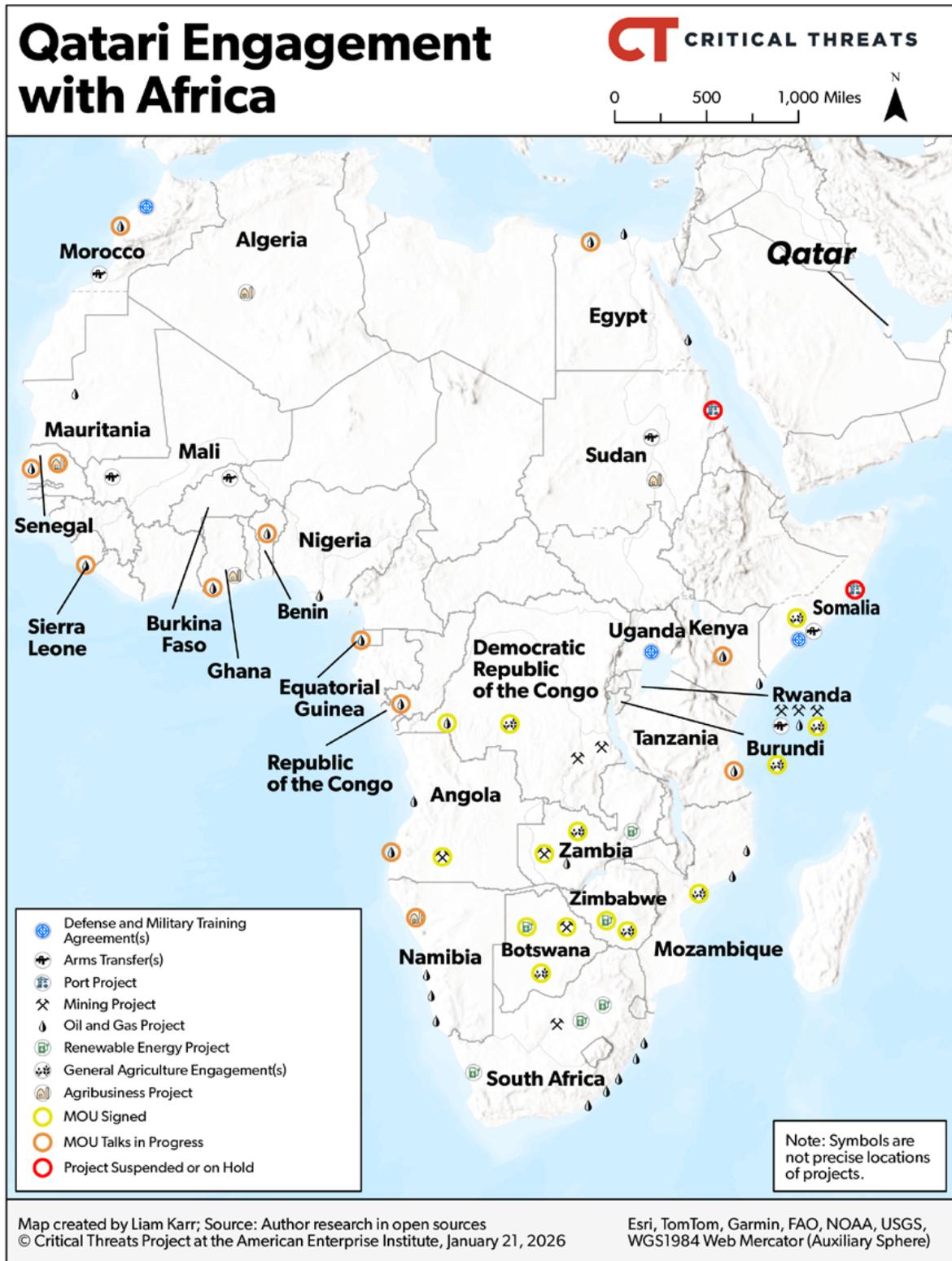
Turkey's growing presence across the continent also increases its leverage with great-power partners and makes it an indispensable international actor. Turkey is a key stakeholder in Libya, which lies along Europe and NATO's southern flank across the Mediterranean. Ankara's relationships in the Sahel and Horn of Africa also position it to contribute to international counterterrorism and maritime security cooperation.

Turkey aims to position itself as a leader of the Islamic world through its partnerships and soft-power influence in Africa. Turkish foreign policy in Africa is rooted in cultivating influence in areas with Ottoman-era ties and a shared Muslim identity, leading some to brand the approach as "neo-Ottomanism."²³⁴ Turkey uses various soft-power tools to capitalize on shared cultural ties that the great powers do not have and to compete with other Islamic countries for leadership of the Muslim world. Turkey built partnerships with Muslim Brotherhood branches throughout Africa and the Middle East as part of its efforts to advance the ruling Justice and Development Party's (AKP's) blend of Sunni politics with like-minded Islamist actors toward this end.²³⁵

Erdoğan views engagement with Africa as an opportunity to consolidate power domestically. Erdoğan has used his partnerships in Africa to crack down on domestic opposition abroad, particularly the Gülen movement, which Erdoğan blamed for a failed coup attempt in 2016.²³⁶ Trade ties with Africa have bolstered the Turkish economy and created patronage opportunities for loyal businesses and allies. The Turkish government has facilitated investment in Africa through tax exemptions, credit, and other incentives, with preferential treatment given to businesses loyal to Erdoğan's party.²³⁷ Turkish defense sales and mercenary deployments also directly support Erdoğan allies, including his son-in-law, who runs the Baykar Defense drone company, and another close associate who runs the SADAT private military company.²³⁸

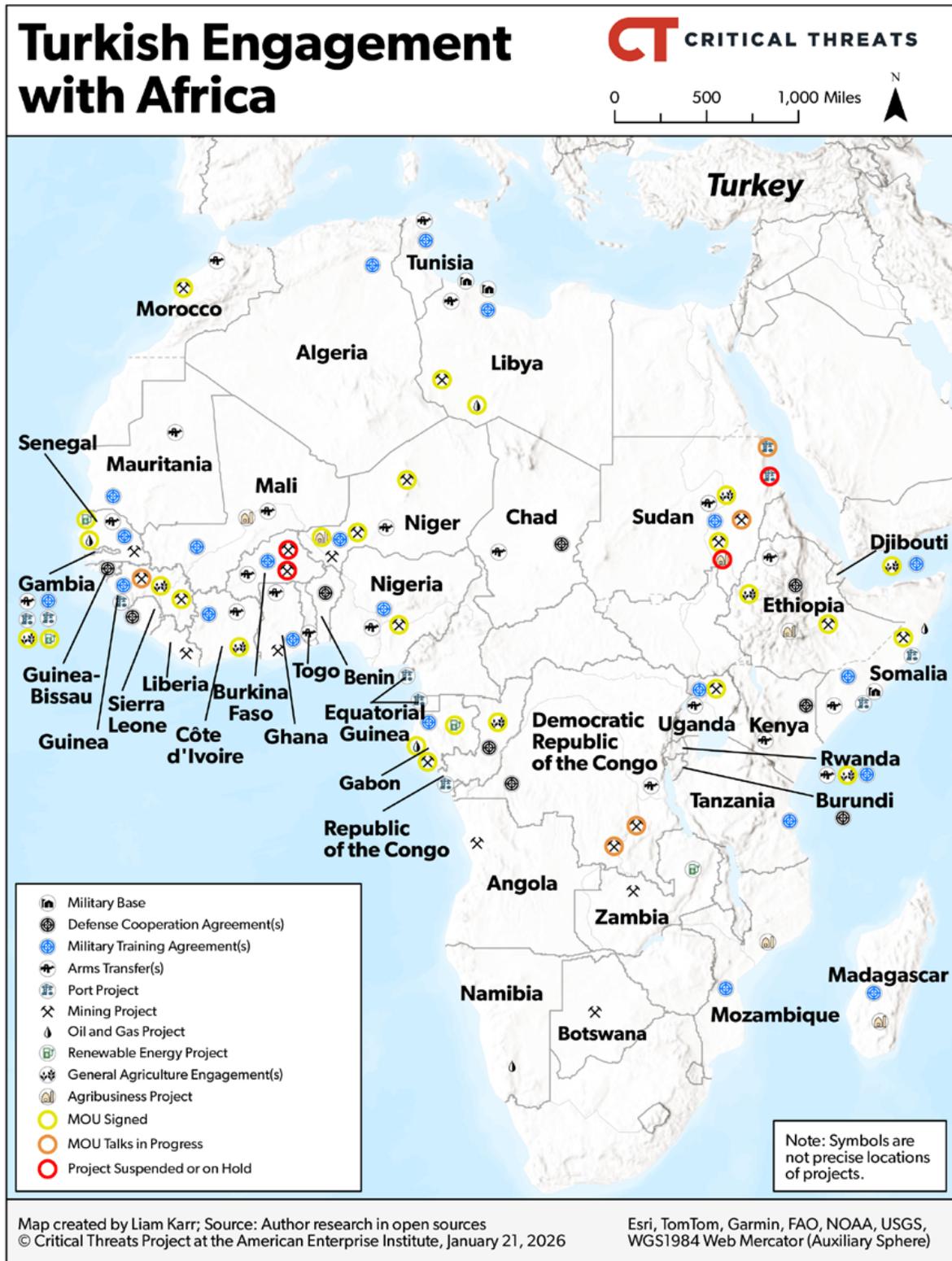
Turkey has turned to Africa to strengthen its energy security as it seeks to decrease dependence on

Figure 14. Qatari Engagement with Africa



Source: Liam Karr; and authors' research.

Figure 15. Turkish Engagement with Africa



Source: Liam Karr; and authors' research.

energy imports. Turkey imports roughly 74 percent of its energy supplies.²³⁹ Turkey has sought to boost its nuclear energy capabilities to help bolster domestic energy supply and turned to Africa to source the uranium needed to fuel a nuclear reactor.²⁴⁰

Turkey uses a whole-of-government approach to cultivate influence across multiple sectors with its African partners. Turkey leverages humanitarian aid and religious education as key parts of a soft-power-first approach.²⁴¹ Erdoğan began to develop a more assertive foreign policy in the Middle East and Africa around 2010, when Turkish economic growth and his growing grip on power gave him the space to pursue a more ideological foreign policy strategy.²⁴² State-run Turkish Airlines has also become one of the leading airlines on the continent, connecting Istanbul with 41 African countries.²⁴³

Turkey's economic growth has driven Turkish companies to seek African markets, leading to greater investment and trade.²⁴⁴ Turkish construction companies have been major players in the African infrastructure space. The Turkish trade minister said in 2024 that Turkish companies had completed nearly 2,000 projects worth nearly \$100 billion across the infrastructure, industry, and energy sectors.²⁴⁵ Major infrastructure projects include ports in Somalia, roads and railways linking other parts of East Africa, and several airports across the continent to create air links via Turkish Airlines. Turkey has signed several agreements with Niger to develop its uranium deposits and struck several deals with Libya, Senegal, and Somalia for oil and gas exploration.²⁴⁶ The Turkish vice president claimed that overall Turkey-Africa trade volume grew from \$5.4 billion in 2003 to \$37 billion in 2024.²⁴⁷

Turkey's defense industrial base is playing a growing role in expanding and strengthening Turkish partnerships on the continent. Turkey is the fourth-largest arms supplier in Africa and the leading provider of drones on the continent, as at least 18 countries use Bayraktar TB2 or Akıncı drones.²⁴⁸ Other Turkish equipment supplies to the continent include small arms, trainer aircraft, helicopters, and armored vehicles. Conventional Turkish trainers or mercenaries with the Turkish state-linked SADAT company are in

five to seven African countries, with the latest missions focusing on West Africa to help contain the strengthening Sahelian Salafi-jihadi insurgency.²⁴⁹

The Evolution of Middle-Power Competition in the Horn of Africa

Changing strategic priorities have shaped Turkey's and the Gulf states' engagement in the Horn of Africa and intensified their competition in the region. The Saudi Arabia-UAE axis, which Egypt later joined, defined regional politics for the latter half of the 2010s. The three countries cooperated to contain revolutionary Islamist groups, including Muslim Brotherhood-linked Sunni groups and Iran-backed Shia factions. This competition extended to countries that the anti-Islamist coalition perceived to be too sympathetic to either Iran or Islamism, primarily Turkey and Qatar.

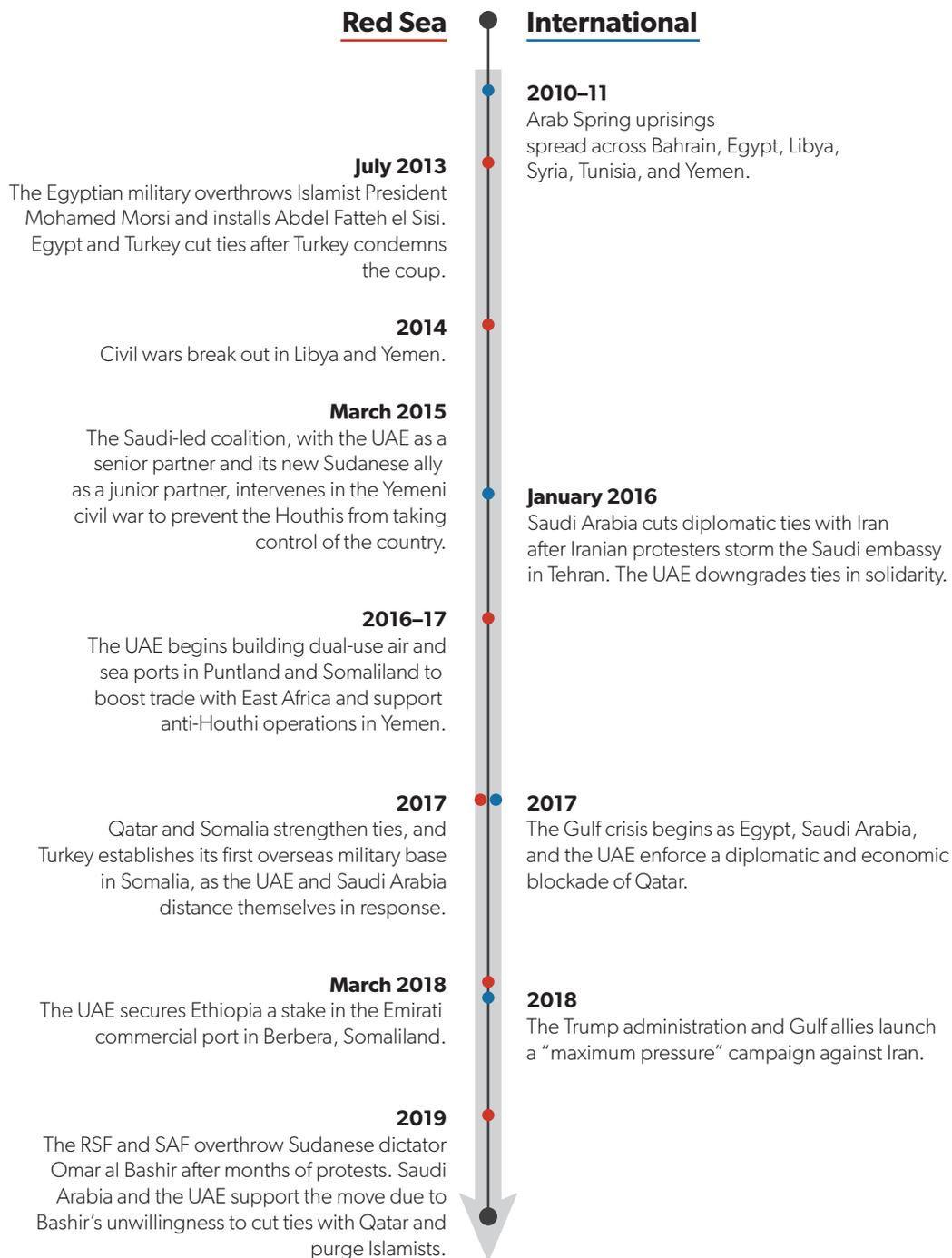
However, several converging economic and political trends around the region and the globe altered the picture in the late 2010s and early 2020s. These shifts led the middle-power peers to prioritize economic concerns over ideological battles, which emphasized different aspects of their approaches and altered pre-existing relationships.

The 2010s: Battle for Islamism

The Horn of Africa was a secondary theater in the intra-regional ideological competition over revolutionary Islamist politics that followed the Arab Spring and dominated Middle East foreign policy priorities in the 2010s (Figure 16). Saudi Arabia, the UAE, and the post-2013 coup Egyptian government sought to suppress popular Islamist movements that they viewed as a threat to their regional influence and domestic stability. Qatar and Turkey took the opposite side, as the Arab Spring created the conditions for them to more overtly provide material support to ideologically aligned Islamist parties in the Middle East and Africa.²⁵⁰

The ensuing competition led the two factions to back opposing sides in the post-Arab Spring political upheaval and ensuing civil wars throughout

Figure 16. The Battle Against Islamism



Source: Liam Karr.

the Middle East and North Africa.²⁵¹ The three anti-Islamist governments cut ties with Qatar and enforced a diplomatic and economic blockade from 2017 to 2021.²⁵² Turkey maintained a tense relationship with Saudi Arabia and the UAE and cut diplomatic ties with Egypt between 2013 and 2021 due to Turkey's condemnation of Egypt's 2013 coup.²⁵³

Egypt, Saudi Arabia, and the UAE also took a hard line against Iran and its proxies, while Turkey and Qatar tried to balance with Tehran. The Gulf allies and Iran supported opposing sides in the Syrian and Yemeni civil wars. The rivalry eventually contributed to the UAE and Saudi Arabia cutting diplomatic ties with Iran in 2016 and supporting US efforts to isolate and weaken Iran through a "maximum pressure" campaign in the late 2010s.²⁵⁴ Egypt has a deep historical rivalry with Iran, and the two have lacked formal diplomatic ties since the Iranian revolution in 1979.

Competition between the anti-Islamist alliance and Iran, Qatar, and Turkey extended to the Red Sea and the Horn of Africa. Iran had a strong relationship with former Sudanese dictator Omar al Bashir for decades after Bashir took power in an Islamist-backed coup inspired by the Iranian revolution in 1989.²⁵⁵ The UAE and Saudi Arabia heavily contributed to Bashir abandoning this relationship in 2015, when they lured him to join their anti-Iran coalition with significant economic investment.²⁵⁶ The UAE and Saudi Arabia then used Sudanese forces from both the RSF and the SAF as part of their coalition against the Iranian-backed Houthi rebels in the Yemeni civil war.²⁵⁷ Egypt, Saudi Arabia, and the UAE supported their allies in Sudan's security forces in taking power from Bashir in 2019 after he refused to purge Islamists from the regime and cut ties with Qatar.²⁵⁸ The UAE has also battled Qatar and Turkey for influence in Somalia for more than a decade.²⁵⁹

The 2020s: Battle for Economic Influence and Regional Stability

Shifting Priorities

Changing political dynamics and economic shocks toward the end of the 2010s created greater space

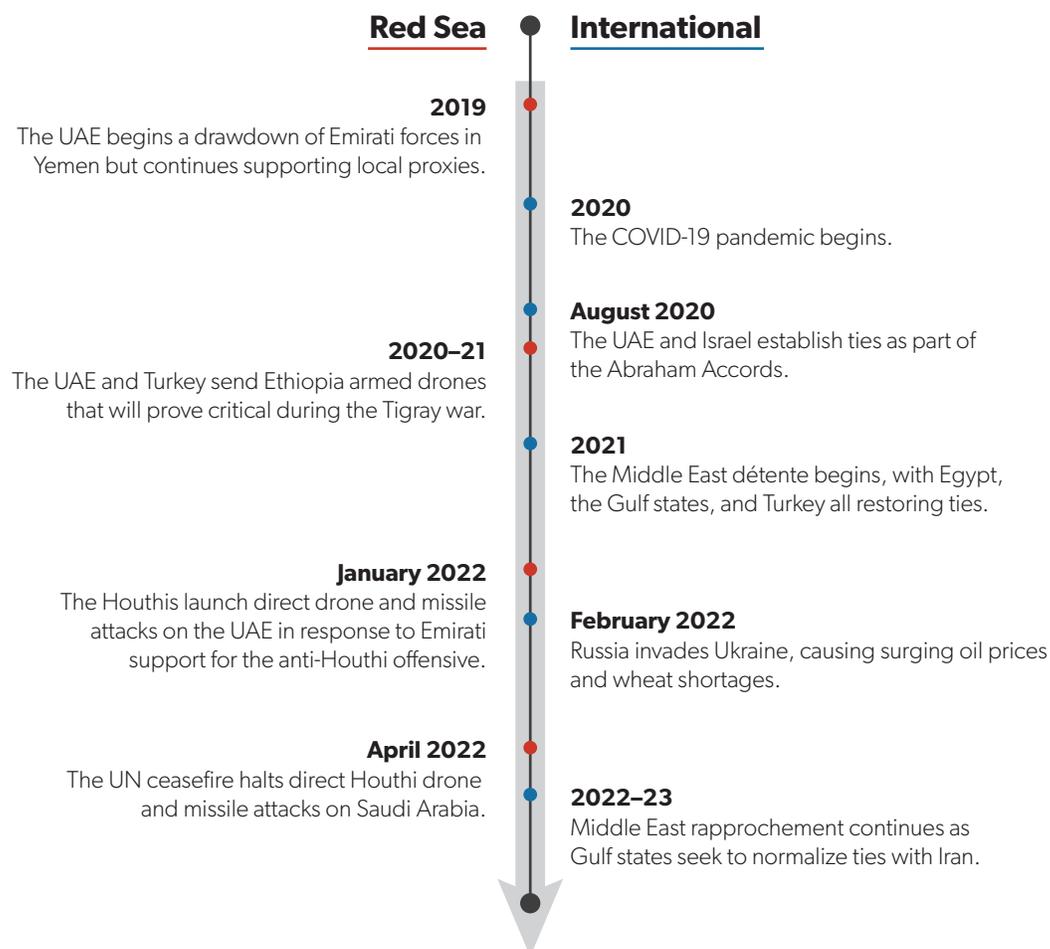
and incentives to prioritize economic objectives (Figures 17–18). The anti-Iran coalition pursued diplomatic engagement over further escalation by the early 2020s due in part to its failure in Yemen, where the Houthis continued to launch drone and missile attacks into Emirati and Saudi territory.²⁶⁰ The Qatar blockade and Libyan civil war separately settled into stalemates, with the coalition unable to fully enforce its will.²⁶¹ The coalition had mostly contained Sunni Islamist movements by the 2020s, however, which became a less salient policy priority as a result.²⁶² Both factors likely contributed to the al Ula reconciliation accord that ended the Gulf crisis in 2021; Turkey's subsequent rapprochement with Egypt, Saudi Arabia, and the UAE; and the Gulf states' reengagement with Iran.²⁶³

The 2020 COVID-19 pandemic and the 2022 Russian invasion of Ukraine caused major economic shocks and led regional powers to give greater priority to economic matters. Turkey had faced high inflation and other severe economic challenges since 2018 and needed Gulf investment and economic ties to boost trade and prevent a cash crisis.²⁶⁴ COVID only exacerbated Turkey's economic challenges and underscored the Gulf states' need to diversify their economies to mitigate the impact of oil price volatility.²⁶⁵ The COVID crash particularly affected areas in which the Gulf states had already tried to diversify, such as aviation, tourism, and logistics.²⁶⁶

Russia's invasion of Ukraine in 2022 was a double-edged sword that only furthered Gulf engagement with Africa. The war spiked oil prices to the benefit of the Gulf states but caused grain shortages that highlighted their food vulnerability. The Gulf states, especially the UAE, have invested this influx of oil money outward, contributing to greater spending in Africa on agriculture projects and other sectors.

These trends partially contributed to the UAE's decision to forge a strategic partnership with Israel through the Abraham Accords. The UAE sought to partner with Israel in 2020 because of the failure of its alliance with Egypt and Saudi Arabia to deter Iran. A partnership with Israel also promised the economic benefits of Israeli investment, technology, and trade.²⁶⁷

Figure 17. Economic Shocks



Source: Liam Karr.

The retrenchment of China, Europe, and the United States in Africa has created more space for middle powers on the continent and more incentive for African states to seek new partners. Anti-Western and particularly anti-colonial sentiment has become more prominent across parts of Africa since 2020, eroding the spheres of influence of former European colonial powers. The war in Ukraine and growing competition between the United States and China have increasingly preoccupied the rest of the world. China has reduced lending to Africa since 2018 amid a slowdown in its own economic growth and concerns over excessive Chinese ownership of African

debt.²⁶⁸ The United States significantly cut spending in Africa after the Trump administration took charge in 2025.²⁶⁹

Heightened Zero-Sum Economic Competition

The heightened emphasis on economic competition has altered middle-power relationships and made Africa a primary theater in a new era of intensified zero-sum middle-power competition in Africa. Saudi Arabia views the UAE's outsized influence in the Horn of Africa and Red Sea as threatening strategic encirclement and undermining its historically dominant position in Gulf affairs, and it is trying to catch

up to lessen Emirati strategic leverage. Gulf green-field investment pledges across Africa throughout 2022 and 2023 totaled \$113 billion, which surpassed European pledges and amounted to more than triple Chinese pledges.²⁷⁰

Saudi Arabia has sought to catch up to the UAE in key sectors such as agriculture, critical minerals, and port infrastructure. Sovereign wealth-backed Saudi firms are threatening to diminish Emirati dominance of regional trade with potential investments in Djibouti's Tadjourah port and possibly Eritrea's Assab port.²⁷¹ The same trend is true in the agriculture sector, in which a Saudi company invested \$1.8 billion in February 2025 to secure a controlling 80 percent stake in a leading food and feed producer in West Africa.²⁷² Most of Saudi Arabia's ambitious foray into African critical minerals has come since 2023 and is part of escalated competition also involving the UAE and China for control of critical mineral supply chains and trading.²⁷³

Israel and the UAE are competing with Turkey in Africa, despite Turkey and the UAE normalizing ties and increasing bilateral cooperation since 2022.²⁷⁴ Israel views Turkey's presence in the eastern Mediterranean, Horn of Africa, and Syria as threatening strategic encirclement. The UAE and Turkey have major agriculture and port investments in Sudan that depend on the opposing sides of the ongoing civil war.²⁷⁵ Turkey is a close partner of the FGS, whereas the UAE and Israel have both grown closer to Somaliland. A major economic and military deal between Somalia and Turkey in 2024 gave Turkey the rights to patrol Somalia's coastline and a 30 percent stake in Somalia's exclusive economic zone at the direct expense of the UAE, which had been negotiating a similar deal with Somalia for over a year.²⁷⁶

Differing Regional Visions for Stability and Partnerships

Shifting priorities have widened the gap between the regional visions of the middle powers, further solidifying a split between an interventionist, revisionist, and risk acceptant UAE and Israel and a more status quo and risk-averse Egypt and Saudi Arabia, with Turkey aligned with the status quo pair.

The UAE and Israel have demonstrated a greater risk tolerance than their peers as they seek to cultivate influence beyond their small borders. This approach includes accepting short-term instability and bending international norms to reshape a regional order that advances their economic and security objectives.

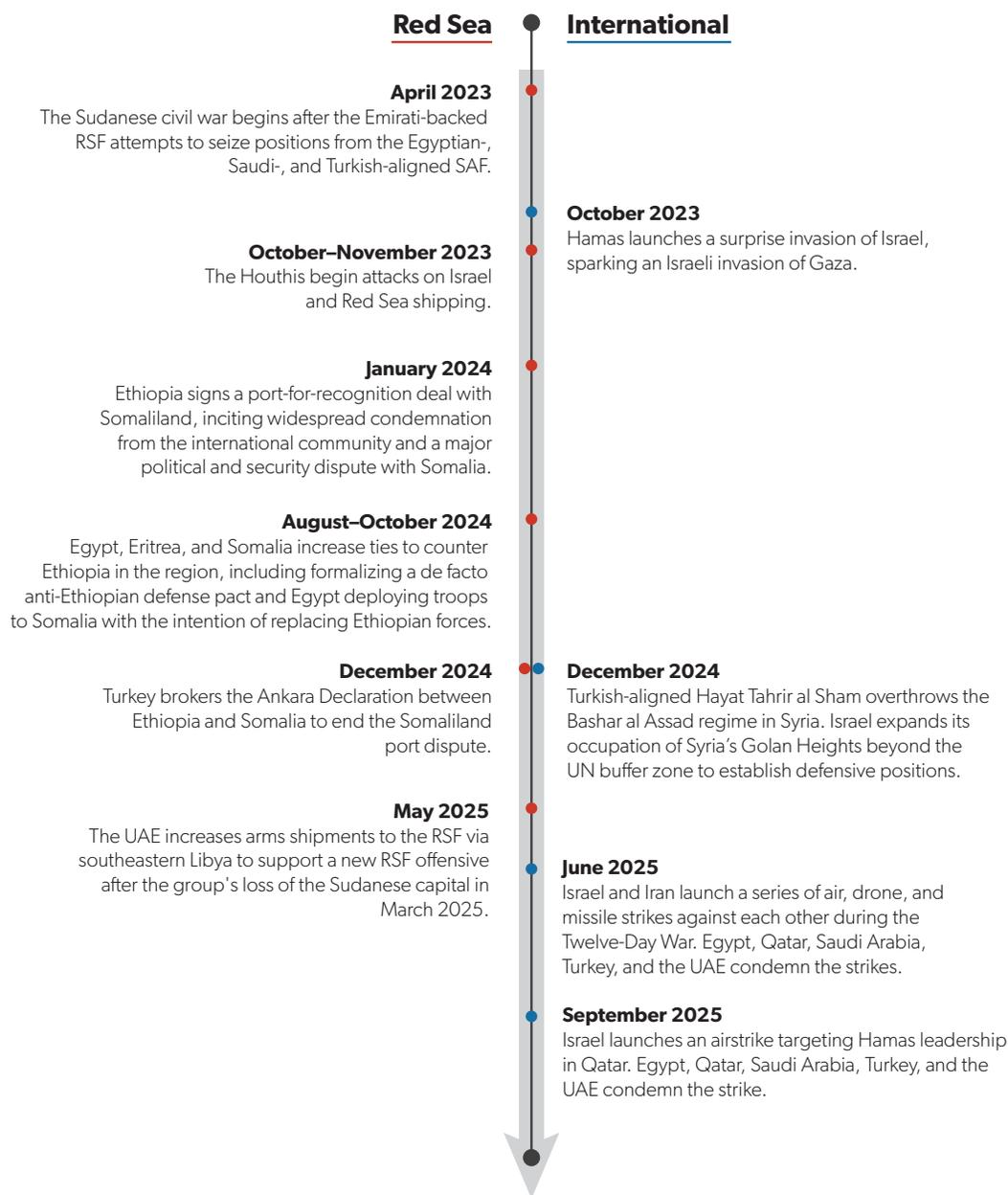
The UAE has been a major player in the Libyan and Yemeni civil wars for nearly a decade. Its proxies in both countries have pursued ambitious power grabs with Emirati backing that have reignited otherwise frozen conflicts.²⁷⁷ An Emirati official said in January 2026 that the UAE has a "tactical firmness that takes reality into account as it is, not as it is wished to be."²⁷⁸

Israeli risk tolerance naturally increased considerably following the October 7 attacks and caused Israeli leaders to reevaluate their security posture fundamentally. As a result, Israel has engaged in several military conflicts beyond Gaza since October 2023. Notable actions include attacking Lebanon in 2024 to disarm Lebanese Hezbollah and expanding its occupation of Syrian territory in 2025.²⁷⁹

The partners' mentality extends to the Horn of Africa, where the UAE and Israel, the latter to a lesser extent, have pursued high-risk, high-reward relationships with disruptive actors, who are often marginalized and have questionable international legitimacy. The UAE has sought to develop transactional partnerships that channel economic and security leverage to promote political alignment with core Emirati economic and political objectives.²⁸⁰ The UAE has repeatedly forged bargains with authoritarian strongmen, brutal armed groups, and secessionist movements. The more desperate a prospective partner is, the more pliable the actor is as an Emirati proxy. This adventurism undoubtedly strengthens the UAE's and Israel's economic influence, but both states also view it as necessary to strengthen their strategic depth in the Red Sea to protect shipping lanes, address the Houthi threat in Yemen, and contain radical Islamism.²⁸¹

Egypt and Saudi Arabia have increasingly sought to contain and manage conflict since 2020 because they perceive any regional instability as a strategic danger that undermines their economic and security interests. Houthi attacks in the Red Sea since October

Figure 18. Cracks Begin to Show



Source: Liam Karr.

2023 further strained Egypt's economy, and the wars in Gaza and Sudan have left Egypt struggling to support millions of refugees. Instability in the Horn of Africa threatens to cause a further influx of refugees, arms trafficking, and other illicit activity along the

Saudi Red Sea coast that would harm Saudi's Vision 2030.²⁸² This containment strategy extends to not only Iran, which both countries still want to contain while avoiding major escalation, but also Israel and the UAE, which they now perceive to be equal if not

greater threats, given Iran's weakened position.²⁸³ An Emirati official implicitly criticized this mentality as counterproductive and "perpetuating crises in their chronic state."²⁸⁴

Egypt and Saudi Arabia promote strengthening strong states within the existing regional order as the best insurer of stability. They point to the role of weak states and nonstate actors in the conflicts in Gaza, Lebanon, Sudan, and Yemen as evidence supporting their positions. Egypt and Saudi Arabia have repeatedly defended the sovereignty and territorial integrity of African states and increased state-based cooperation across the region. A Saudi diplomat said that "the UAE's approach creates non-state centers of influence, which could weaken Red Sea states and contribute to their fragmentation."²⁸⁵

Turkey is more willing to accept instability than Saudi Arabia or Egypt is, but its state-based approach in Africa generally aligns its regional vision with Cairo and Riyadh. Turkey's engagements in Libya and Syria and its weapons sales across Africa show that it is more tolerant of instability than the large Arab powers. However, Turkey pursues influence via state-based partnerships, which often make it incompatible with the UAE and position Egypt and Saudi Arabia as Turkey's natural partners.²⁸⁶ Turkish-backed African governments losing control over territory and resources to Emirati-backed secessionists is often a zero-sum exchange.

Middle-Power Coalitions in the Horn of Africa

The new era of middle-power competition maps largely onto preexisting African dynamics, exacerbating the divide between an Emirati- and Israeli-backed axis of revisionists and a status quo coalition of African states aligned with Egypt, Saudi Arabia, and Turkey (Figure 19). The UAE's core partners in the Horn of Africa are all pushing to upend the regional balance of power, internationally recognized governments, or internationally recognized borders. These partners include the RSF, Ethiopia, and the de facto autonomous regions of Somalia—Jubbaland, Puntland, and

Somaliland. These partners are naturally positioned to support core Emirati objectives, and they are all seeking partnerships that will lessen their regional and international isolation. The UAE has also strengthened partnerships with geographically peripheral countries and actors to improve its strategic depth in the region and help legitimize its dubious partners.

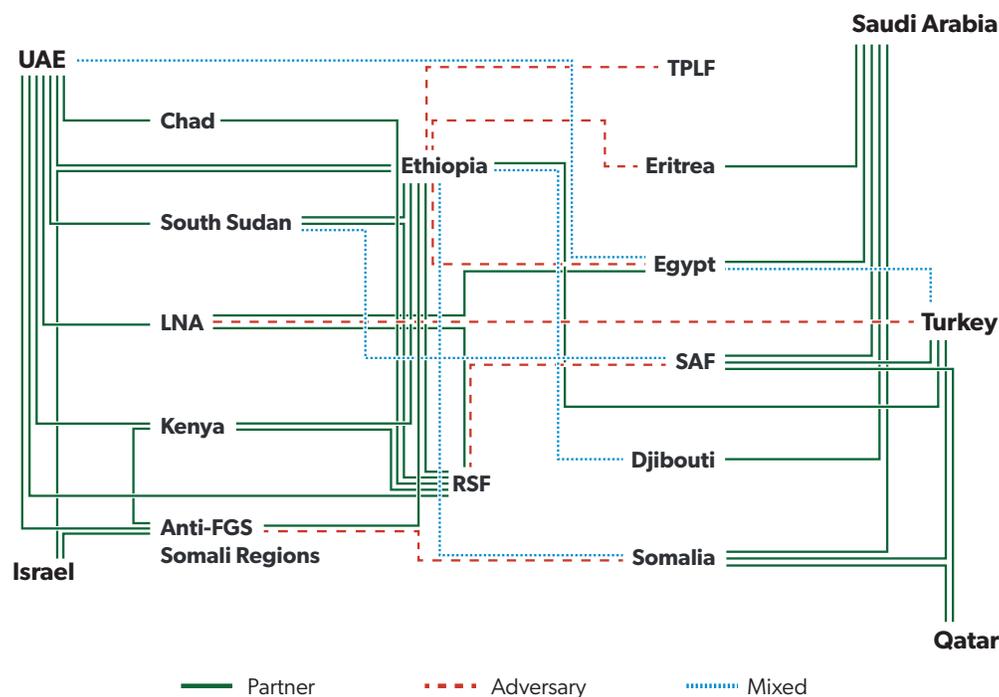
Egypt and Saudi Arabia, and Turkey and Qatar to varying degrees, are partnering with a handful of African states to counter the UAE-Israel axis. Saudi Arabia has established increasingly multidimensional partnerships with Djibouti, Eritrea, Somalia, and Sudan to both counter Emirati influence and create bulwarks against regional instability. Egypt has already been growing partnerships with these states as part of its efforts to contain Ethiopia. Turkey has strategic partnerships with Somalia and Sudan to expand influence in the Horn of Africa and adjacent waterways, but Turkey also has a strong partnership with Ethiopia. Qatar has a long-standing presence in Sudan and plays a small but important role in Somalia, and these partnerships create limited alignment with the other powers in the status quo axis.

These coalitions and tensions naturally map onto the preexisting local power struggles in the region, with some exceptions. Ethiopia and nonstate actors are suitable partners for the UAE as aggressive yet pliable proxies capable of significantly strengthening Emirati influence through their local aims. The same African states that Egypt has partnered with to contain Ethiopia are generally aligned with Saudi Arabia and Turkey. Ethiopia's quest for sea access and local separatist movements threaten not only African states but also Egypt's and Saudi Arabia's shared interest in regional stability and Saudi efforts to counter the UAE.

Multilateral cooperation in Africa among the middle-power coalitions has further solidified their partnerships across the Red Sea region and beyond. Israel's relationship with the UAE has heavily shaped Israeli engagement in the region. Israeli officials claimed that their Emirati counterparts facilitated Israel's recognition of Somaliland in December 2025.²⁸⁷

The UAE's role in Sudan has promoted pro-RSF sympathy in Israel and contributed to Israel's neutral stance in Sudan's civil war. The UAE helped facilitate

Figure 19. Middle-Power Partnerships in the Horn of Africa



Source. Liam Karr and Michael DeAngelo.

ties between RSF leader Hemedti and Israel’s national intelligence agency Mossad, and these ties have kept the more pro-SAF Israeli Foreign Ministry from running Israel’s Sudan policy.²⁸⁸ Some Israeli-linked social media accounts and media outlets have also amplified Emirati information narratives that highlight and at times exaggerate the SAF’s ties to Islamists and Iran.²⁸⁹

Egypt and Saudi Arabia have increased diplomatic cooperation to address mutual concerns and promote strong states. Saudi Arabia launched the Red Sea Council in 2020 to create a multilateral forum for cooperation with other littoral states on regional stability.²⁹⁰ The body notably excludes Ethiopia, Israel, and the UAE. The Egyptian and Saudi foreign ministers publicly labeled their stances on the territorial unity and sovereignty of Somalia, Sudan, and Yemen “identical” in early 2026.²⁹¹

Turkey has overcome lingering friction with Egypt and Saudi Arabia to increase cooperation in the Red Sea and beyond due to their mutual alignment.²⁹²

Turkey is coordinating diplomatically with Egypt and Saudi Arabia on key Red Sea policy issues including Somalia, Sudan, and Yemen.²⁹³ Egypt and Turkey are coordinating militarily in Sudan, including cooperating with the SAF on drone strikes against the RSF.²⁹⁴

These growing ties have set conditions for greater cooperation beyond the immediate Red Sea area. Egypt and Turkey signed a series of agreements in February 2026 to upgrade their “strategic” ties.²⁹⁵ One of these agreements covered increased intelligence sharing and defense industrial production, building on the fusion of Egyptian intelligence and Turkish drones in Sudan.²⁹⁶ Egypt, Saudi Arabia, and Turkey have more closely aligned their positions on the need to rebuild a stable and unified Syria, secure Palestinian statehood, contain what they view as Israeli aggression in both areas, and manage tensions with Iran.²⁹⁷ Turkey has expressed interest in joining Saudi Arabia’s mutual defense pact with Pakistan and held its first high-level naval coordination talks with Saudi Arabia in January 2026.²⁹⁸

Middle-Power Bilateral Partnerships in the Horn of Africa

The UAE's comparatively aggressive approach has led it to become the most influential middle power in the region, with Egypt, Saudi Arabia, and Turkey balancing against it. This reality is evident in the breadth and depth of Emirati engagement. The UAE is actively involved in at least two of six major sectors—agriculture, energy, infrastructure, mining, port development, and security—in all 12 East African countries plus Somaliland. The UAE has active or pending deals in four or more sectors in all but four of these territories and is involved in all six major sectors in Somalia, Somaliland, Sudan, and Tanzania. Emirati investments in East Africa total nearly \$50 billion, making the UAE responsible for 60 percent of Gulf investment in East Africa and contributing to the UAE's status as the fourth-largest source of capital in all of Africa.²⁹⁹

Saudi Arabia, Turkey, and Qatar combined have invested less than the UAE and are active in fewer sectors. Saudi Arabia and Turkey individually have active or pending investments in four or more sectors in only three East African countries—both in Sudan, Turkey in Somalia, and Saudi Arabia in Djibouti.³⁰⁰ Sudan is the only country where Qatar, Saudi Arabia, and Turkey combine to have active or pending agreements in all six sectors.

Emirati involvement in the security sector far surpasses its other middle-power competitors and partially contributes to this trend. The UAE has ongoing defense cooperation with nearly every East African country along the Red Sea and the Indian Ocean coastlines except Kenya, to which it has still sold defense equipment.³⁰¹ Emirati defense partnerships cultivate political influence and strengthen strategic depth to support Emirati or allied military operations related to core Emirati interests across the region.³⁰²

The UAE

The UAE in Sudan

The UAE has wanted to make Sudan an anchor state in its regional policy since the 2010s and has chosen the RSF as its partner in the current civil war

(Table 1). The UAE had a transactional relationship with Sudan's Bashir regime that is emblematic of many of its other relationships. Bashir aligned himself with the UAE on core Emirati interests regarding Iran and Yemen in 2015 in exchange for at least \$7.6 billion to Sudan's central bank to save the collapsing and isolated Sudanese economy.³⁰³ Bashir's concessions to the UAE included sending RSF and SAF forces to participate in the Saudi-led coalition in Yemen in 2015. The Gulf investments could not solve Sudan's liquidity crisis, however, and the UAE and Saudi Arabia abandoned Bashir in 2019 after he continued to hedge his stance on the Gulf crisis and refused to purge Islamists from his regime.³⁰⁴

The UAE has pledged to invest nearly \$22 billion in Sudan across various sectors since the fall of the Bashir regime, representing roughly half of its investments in East Africa.³⁰⁵ The UAE focused most of its support on the Sudanese security forces when they entered a civilian-led transitional government and gave diplomatic cover to their Sudanese partners when they overthrew the civilian government in 2021.³⁰⁶ More than \$10 billion of this investment is into agriculture, including a deal to acquire 2.4 million acres of farmland along the Nile River.³⁰⁷ Another \$10 billion is focused on infrastructure, including a nearly \$6 billion deal to develop the Abu Amama port.³⁰⁸ The UAE has accounted for well over 90 percent of Sudanese gold exports since the country increased gold production in response to Sudan's economic crisis following South Sudan's independence in 2011.³⁰⁹

The UAE has backed Hemedti and his paramilitary RSF to protect its interests in Sudan's civil war. Hemedti and the RSF fought in the Libyan and Yemeni civil wars under Emirati command and control a significant portion of Sudan's gold trade.³¹⁰ The UAE had many reasons to consider backing the SAF, given SAF involvement in the Emirati coalition in Yemen, billions of dollars in gold exports, and territorial control over almost all the now-suspended Emirati investments along the Nile or Red Sea coast.³¹¹ The UAE may have partially viewed the SAF as an untrustworthy partner due to its Islamist ties, which the UAE still views as a major concern.³¹² The UAE has also maintained a degree of economic cooperation with

Table 1. Key Emirati Partnerships in the Wider Horn of Africa

Chad	<p>Investment. The UAE loaned Chad \$1.5 billion in 2023, and Emirati investors pledged a further \$6 billion in unspecified sectors in late 2025.</p> <p>Sudan Support. The UAE established a rear base near the Sudanese border in Amdjarass, Chad, to serve as a hub for weapon shipments to the RSF.</p>
Ethiopia	<p>Defense. The UAE supplied Ethiopia with vital drones and matériel during the Tigray war and trains Prime Minister Abiy's personal protection force, the Republican Guard.</p> <p>Investment. The UAE spent at least \$3 billion after Abiy took power in 2018 and has supported Abiy's plans to modernize the Ethiopian capital and Abiy's \$10 billion residence.</p> <p>Trade. The UAE was Ethiopia's top export destination in 2024, and the UAE has overtaken India and France to become a top-three exporter to Ethiopia since 2020. Total bilateral trade reached nearly \$2 billion in 2024.</p> <p>Sea Access. The UAE brokered a failed attempt to get Ethiopia a stake in the Emirati port in Somaliland in 2018 and has continued to tacitly support Ethiopian sea-access efforts.</p> <p>Sudan Support. The UAE recently established a rear base near the Sudanese border in Ethiopia's Benishangul-Gumuz region to serve as a hub for weapon shipments to the RSF.</p>
Jubbaland (Somalia)	<p>Defense. The UAE signed a deal with the Jubbaland government to establish a base in 2023 and train state forces.</p>
Kenya	<p>Investment. Emirati companies have signed agreements for nearly \$4 billion in investments across agriculture, mining, tech, and more since 2024.</p>
LNA	<p>Defense. The UAE has supported the LNA since the 2010s and conducted drone strikes, financed Sudanese mercenaries, and sent other weapons systems to the LNA in its failed attempt to capture Tripoli in 2019.</p> <p>Sudan Support. The UAE established a rear base near the Sudanese border in al Kufra, Libya, to serve as a hub for weapon shipments to the RSF.</p>

Continued on the next page

Table 1. Key Emirati Partnerships in the Wider Horn of Africa (Continued)

<p>Puntland (Somalia)</p>	<p>Defense. The UAE established a base in Bossaso in 2022, which it has used to support regional counterterrorism activities and monitor Houthi activities. The UAE also established the Puntland Maritime Police Force in 2010 as an anti-piracy force and continued to train and fund the group as a counterterrorism force.</p> <p>Investment. The UAE has invested nearly \$350 million into the port of Bossaso since securing a 30-year concession to operate the port in 2017.</p> <p>Sudan Support. The UAE has used its base in Bossaso as a key layover point for weapons shipments transiting from the UAE to Chad and Libya.</p>
<p>RSF (Sudan)</p>	<p>Defense. The UAE is the main patron of the RSF and has directly enabled RSF advances with Chinese-made drones, mercenaries, and other matériel.</p> <p>Investment. The RSF controls a significant portion of Sudan’s gold production, and the UAE imported 27 tons of gold—equating to nearly \$2 billion—from neighboring Chad and Libya, which are exit points for RSF gold exports.</p> <p>Politics. The UAE has supported the RSF’s position in international peace talks that the rival SAF be excluded from a future Sudanese government due to the SAF’s Islamist ties. The UAE has also sought to strengthen international support for the RSF via information operations and logistic and administrative support to the RSF’s parallel government.</p>
<p>Somaliland (Somalia)</p>	<p>Defense. The UAE turned a planned air base in Berbera into a civilian airport in 2019 after it scaled back its involvement in the Yemeni civil war. The airport still has a runway and air hangars capable of accommodating transport aircraft and fighter jets, and the nearby commercial port also has a deepwater dock.</p> <p>Investment. The UAE has invested nearly \$450 million into the port of Berbera since securing a 30-year concession to operate the port in 2016.</p>
<p>South Sudan</p>	<p>Investment. Dubai-based companies signed agreements for a \$13 billion loan-for-oil deal with South Sudan in 2024.</p>

Source: Authors’ research from open sources.

Figure 20. Emirati-Linked Weapons Shipments in the Horn of Africa



Source: Liam Karr.

the SAF-backed government, including growing gold exports that reached nearly \$2 billion in 2024, lessening the consequences of backing the RSF.³¹³

Emirati support has been indispensable to the RSF's prosecution of the war in Sudan (Figure 20). The UAE has used its network of bases in Africa to create an air bridge to friendly states on Sudan's western border in Chad and Libya, where it ships Chinese-made drones, mercenaries, drone jammers, surface-to-air missiles, and other matériel to RSF rear staging areas.³¹⁴ The UAE's lone insistence on excluding both the SAF and the RSF from a future transition government has effectively provided the RSF political cover by leading the SAF and its partners to reject Emirati terms, effectively gridlocking the peace process. The UAE has also worked to develop international support for the RSF through information operations and providing logistic and administrative support to the RSF-backed parallel government.³¹⁵

The UAE in Northern Somalia and Djibouti

The de facto autonomous Somaliland and Puntland regions in northern Somalia have emerged as another pole of Emirati activity, although these partnerships have cost the UAE its relationship with Djibouti and the FGS (Table 1). The UAE turned to Somaliland as early as 2016 to diversify beyond Djibouti, which had been the UAE's major trade node in East Africa since 2000.³¹⁶ Djibouti viewed the nearby, major, Emirati-operated Port of Doraleh as a significant threat to its economic security and eventually seized it and expelled DP World in 2018.³¹⁷ The Djiboutian president has since been highly critical of the UAE's role in the region.³¹⁸ The UAE's loss in Djibouti only increased the importance of northern Somalia, where the UAE has invested nearly \$800 million into Emirati-managed port projects in Puntland and Somaliland.³¹⁹

The UAE has established strong defense ties with Somaliland and Puntland to protect its regional trade network and address counterterrorism concerns. The UAE has established flexible, temporary bases in both port cities, highlighting the dual-use nature of its engagement.³²⁰ The UAE scrapped plans to establish a base in Berbera in 2019 and turned the base into a

civilian airport after it scaled back its involvement in the Yemeni civil war.³²¹ Emirati forces established a base in Bossaso in 2022, with the stated purpose to support its counterterrorism activities in Puntland, where al Qaeda- and Islamic State-linked militants are embedded in mountainous areas.³²² The UAE also created the Puntland Maritime Police Force in 2010 as an anti-piracy unit and continues to fund and supervise the unit as a counterterrorism force.³²³

The UAE tries to maintain a security-focused relationship with the FGS to combat al Shabaab and counter Turkish influence. The UAE began training Somali soldiers and paying their salaries as part of its counterterrorism efforts in 2014, but it paused all defense cooperation from 2017 to 2022 due to Somali President Mohamed Abdullahi Mohamed's (Farmaajo's) close ties to Qatar and Turkey.³²⁴ The UAE instead pivoted to working with friendly local governments, including Somaliland, which further frayed relations with the FGS.³²⁵

The 2022 return of President Mohamud, who had served a first term from 2012 to 2017, temporarily improved the relationship but has not reversed the UAE's drift away from the FGS. The UAE resumed training Somali forces and signed a defense agreement in January 2023 that enabled Emirati airstrikes and material support.³²⁶ Suspected Emirati involvement in Ethiopia's and Israel's attempts to recognize Somaliland has halted any further rapprochement.³²⁷

The FGS signed two major defense and economic deals with Turkey to counter the Ethiopia-Somaliland port deal in 2024. These agreements not only strengthened an Emirati competitor but also came at the direct expense of the UAE, with which the FGS had been discussing similar deals within the previous year.³²⁸ Isolated Somali media reports in 2024 claimed that the UAE cut financial support for Somali forces in retaliation.³²⁹ The FGS then annulled all defense and port deals and banned Emirati cargo and military flights from Somali airspace in early 2026 in retaliation for alleged Emirati violations of Somali sovereignty, including unsanctioned flights and presumably referring to any Emirati role in Israel's recognition of Somaliland.³³⁰

The UAE in Ethiopia and Eritrea

Ethiopia has become an Emirati anchor state, building strategic ties with the UAE since Prime Minister Abiy took office, in 2018 (Table 1). The UAE has invested billions into Ethiopia since Abiy's accession. The UAE initially spent \$3 billion on aid and investment shortly after Abiy took power to support Abiy's reforms and address foreign currency shortages.³³¹ The UAE has spent billions more backing Abiy's plans to renovate and modernize the Ethiopian capital, Addis Ababa, including Abiy's \$10 billion residence.³³² The Emirati trade minister told state media that the UAE had invested an additional \$2.9 billion in 2022.³³³ The UAE and Ethiopia signed 17 different agreements in 2023 involving agriculture, customs, finance, ports, and trade, and an \$817 million currency swap in 2024.³³⁴

Bilateral UAE-Ethiopia trade has grown dramatically, particularly since 2021. The UAE became the leading recipient of Ethiopian exports for the first time in 2021 and was again in 2024, when it surpassed \$1 billion in imports from Ethiopia for the first time.³³⁵ The UAE has also become one of the top-three exporters to Ethiopia, overtaking India and France since 2020. Total bilateral trade reached an all-time high in 2024, reaching nearly \$2 billion.

Emirati military support has been critical at various points in Abiy's tenure, further tightening the countries' relationship and creating elements of dependency. Emirati military support, including drones and a supply air bridge, directly contributed to Abiy turning the tide of the Tigray war when the Tigrayans were threatening to capture the capital.³³⁶ Weapons transfers have continued in the years since, with the UAE transferring 20 used fourth-generation Mirage 2000-9 fighter jets to Ethiopia in early 2026.³³⁷ The UAE also trains Abiy's personal protection force, the Republican Guard.³³⁸ Training activities expanded in 2025 to include training the Ethiopian Federal Police in cybercrime, personal protection, and counterterrorism.³³⁹

The UAE has supported Abiy's efforts to secure Red Sea access, which would give the UAE a greater share of Ethiopia's massive trade flows and another defense partner in the Red Sea area. The UAE directly brokered the failed attempt to gain Ethiopia commercial sea access via Somaliland as part of the Emirati

Berbera port deal. The deal gave Ethiopia rights to a commercial hub in Berbera and a minority ownership stake in the port in exchange for an \$80 million Ethiopian infrastructure investment into roadways that would link Berbera to Ethiopian markets.³⁴⁰ Ethiopia never followed through, however, which led Somaliland to officially revoke its stake in 2022.³⁴¹ Analysts and international officials suspect that the UAE at least tacitly approved of the subsequent 2024 Ethiopia-Somaliland port deal.³⁴² The UAE finalized a separate bilateral deal in 2025 for a \$3 billion railroad system connecting Ethiopia and Berbera.³⁴³

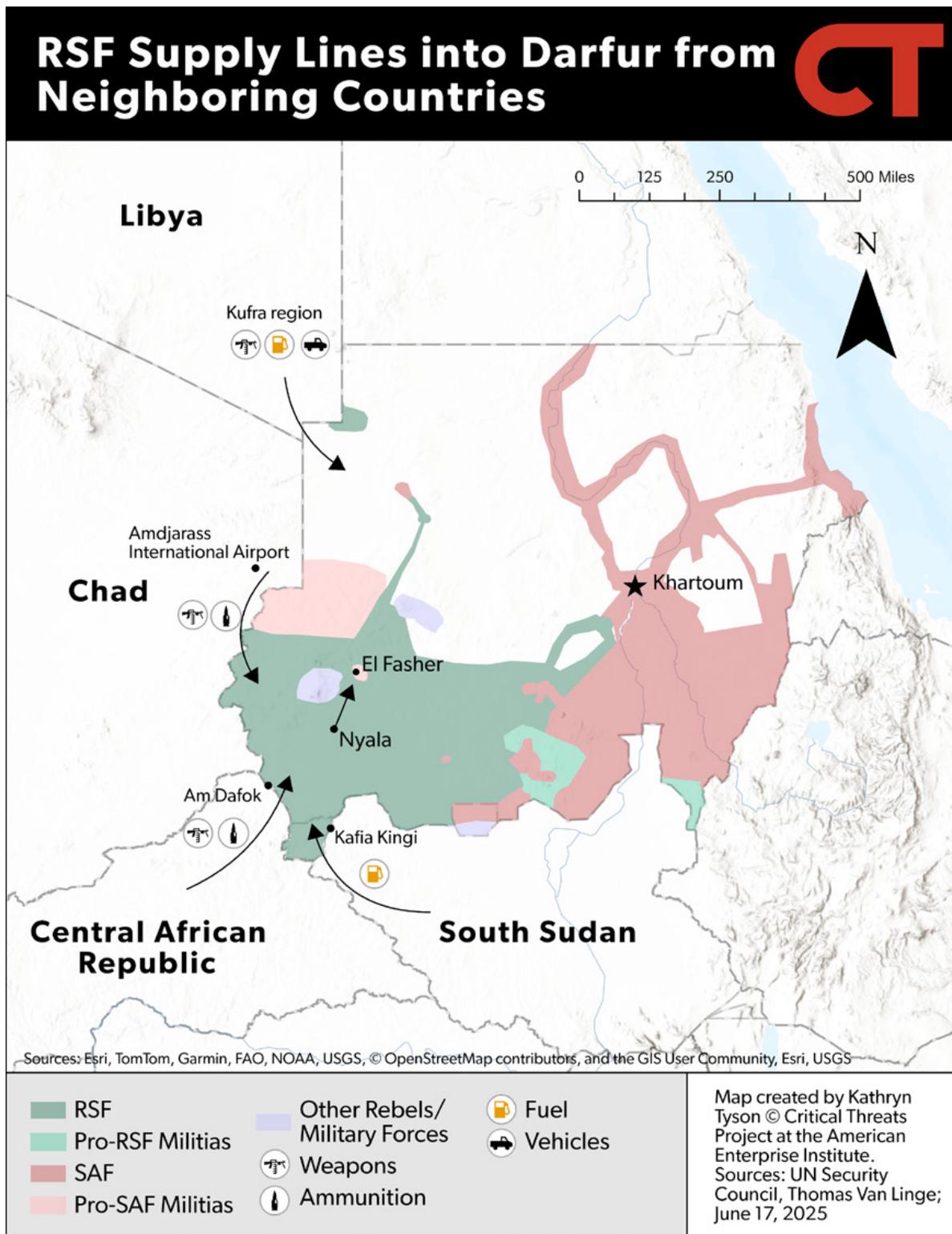
The UAE's increasingly strong relationship with Abiy has come at the expense of Emirati-Eritrean ties (Table 1). The UAE initially sought to bring Eritrea into its anti-Houthi Red Sea coalition in 2016. The UAE's outreach to President Isaias Afwerki was similar to its strategy in Sudan, where it bribed an authoritarian, isolated leader to break ties with Iran and support the UAE in exchange for financial incentives. Eritrea allowed the UAE to set up a base in Assab and the Eritrean Red Sea islands to support its war in Yemen.³⁴⁴

Ethiopia viewed the growing relationship as a threat, however, and pushed the UAE to prioritize other regional alternatives over Assab.³⁴⁵ The UAE took a growing interest in Somaliland as a preferable alternative to Eritrea in the following years due to Ethiopian lobbying, evolving battlefield dynamics in Yemen, and its deteriorating relationship with Djibouti.³⁴⁶ The UAE's growing preference for Ethiopia has drawn the ire of Eritrea and led Isaias to label the UAE an imperialist "enemy" and accuse the Emirates of supporting Abiy's "expansionist agenda."³⁴⁷

The UAE in the Periphery

The UAE has strengthened partnerships with geographically peripheral countries and actors in recent years to improve its strategic depth in the Horn of Africa and legitimize its secessionist partners (Table 1). The UAE has invested billions of dollars in countries surrounding the periphery of the Horn of Africa as part of its transactional "bailout diplomacy" since 2023. Dubai-based companies signed agreements for a \$13 billion loan-for-oil deal with South Sudan in 2024 and a \$4 billion stake in a Ugandan oil

Figure 21. RSF Supply Lines into Darfur from Neighboring Countries



Source: Kathryn Tyson; UN Security Council, "Letter Dated 14 April 2025 from the President of the Security Council Acting in the Absence of a Chair of the Security Council Committee Established Pursuant to Resolution 1591 (2005) Concerning the Sudan Addressed to the President of the Security Council," April 17, 2025, <https://digitallibrary.un.org/record/4081224>; and Thomas Van Linge.

refinery in 2025.³⁴⁸ Chad secured a \$1.5 billion Emirati loan in 2023 and a further \$6 billion in investment pledges in late 2025.³⁴⁹ Emirati companies have signed agreements for a \$1 billion data center, a \$500 million investment in Kenyan mining, an \$800 million irrigation project, and a \$1.5 billion loan since 2024.³⁵⁰ Emirati officials have discussed providing funds to Central African Republic (CAR) President Faustin-Archange Touadéra to cover the \$15 million monthly cost to keep Russian Africa Corps forces in the country.³⁵¹

The UAE has supported Libyan warlord Khalifa Haftar and his Libyan National Army (LNA), which controls eastern Libya, since the 2010s. Haftar secured Emirati backing in 2014 by positioning himself as a staunch ally in battling Islamist-linked militias tied to the internationally recognized government in western Libya. Emirati financial support and arms helped Haftar consolidate power over eastern Libya and its oil fields in the mid-2010s.³⁵² The UAE then conducted drone strikes, financed Sudanese mercenaries, and sent air defense systems, drones, and other weapons to Haftar in his failed attempt to capture Tripoli in 2019.³⁵³ The failure of the Tripoli offensive and subsequent shifts in middle-power politics led the UAE to increase ties with Turkey and the Turkish-backed, western-based Libyan government as part of a more balanced approach, although it has retained its close ties with the LNA.³⁵⁴

The UAE has used these partnerships to facilitate weapon shipments to the RSF, which has further regionalized the Sudanese civil war (Figure 21). The UAE has established two rear bases for the RSF near the Sudanese border with Chad and eastern Libya. The UAE set up its rear base in Chad days after granting the Chadian government the \$1.5 billion loan—nearly the entirety of Chad’s annual budget.³⁵⁵ Substate actors, such as Puntland and the Haftar-controlled LNA, are key parts of the network, but several African states are also complicit.³⁵⁶ Weapons shipments from the UAE reach Chad and eastern Libya via the UAE and fly along various routes through Ethiopian, Kenyan, South Sudanese, and Ugandan airspace. Sudanese officials and numerous analysts have also claimed that recent Emirati weapons shipments to Ethiopia are for a new RSF rear base in Ethiopia.³⁵⁷ Emirati officials

have separately been negotiating access to the CAR as a potential RSF rear base as part of talks with the CAR president on financial support.³⁵⁸

The UAE cultivates ties between its nonstate allies and other partner states to increase the legitimacy of its nonstate allies in the international community. The UAE directly facilitated Ethiopian access to Berbera via the 2018 Berbera port deal and helped broker Israel’s recognition of Somaliland in 2025. Emirati security support for Puntland has enabled the latter to contribute to international anti-piracy and counterterrorism efforts, bringing Puntland into the regional security architecture.³⁵⁹ Kenya has played a key role in hosting political summits for Emirati-backed actors, such as the RSF and Somali regional governments.

Israel

Israel in Ethiopia

Israel has strengthened preexisting ties with Ethiopia in recent years (Table 2). The Ethiopian Orthodox Tewahedo Church and Judaism have strong traditional ties, and there is a community of over 175,000 Ethiopian Jews in Israel known as the Beta Israel.³⁶⁰ Israel and Ethiopia had a strong defense partnership during the 1960s, as they sought to prevent Egypt from dominating the Horn and counter Arab support for the Eritrean liberation movement and Somalia’s invasion of Ethiopia’s Ogaden region.³⁶¹ However, Ethiopia formally cut ties with Israel in 1973 after the Yom Kippur War, under pressure from Arab and African institutions. Israel and Ethiopia reestablished relations in 1989, and Israel has since become a major partner in agricultural trade and technological training.³⁶²

Israel has increased defense cooperation with Ethiopia in recent years, establishing Ethiopia’s position as an anchor state for Israeli regional policy. The Ethiopian and Israeli intelligence services signed an agreement in 2020 to strengthen counterterrorism and intelligence coordination.³⁶³ The cooperation enabled Emirati, Ethiopian, and Israeli intelligence services to thwart an Iranian attack plot targeting the Emirati embassies in Ethiopia and Sudan.³⁶⁴ The Ethiopian and Israeli foreign ministers made separate

Table 2. Key Israeli Partnerships in the Wider Horn of Africa

<p>Ethiopia</p>	<p>Defense. The Ethiopian and Israeli intelligence services signed an agreement in 2020 to strengthen counterterrorism and intelligence coordination and have discussed cooperating against the Yemeni Houthis and al Qaeda’s Somali affiliate, al Shabaab.</p> <p>Investment and Trade. Israel has become a major Ethiopian partner in agricultural trade and technological training, and Ethiopian and Israeli delegations discussed cooperation on agriculture, water and climate, renewable energy, and health during visits in 2025.</p> <p>Religious Links. The Ethiopian Orthodox Tewahedo Church and Judaism have strong traditional ties, and over 175,000 Ethiopian Jews live in Israel.</p>
<p>Somaliland (Somalia)</p>	<p>Defense. Israeli negotiations on Somaliland recognition involved discussions on an Israeli base in Somaliland to monitor Houthi activity across the Bab el Mandeb Strait in Yemen.</p> <p>Politics. Israel became the first country to recognize Somaliland’s statehood in December 2025, and recognition discussions reportedly included resettling displaced Palestinians in Somaliland.</p>

Source: Authors’ research from open sources.

visits to each other’s capitals in 2025, bringing delegations to discuss cooperation on agriculture, water and climate, renewable energy, and health.³⁶⁵ The two ministers also discussed counterterrorism coordination and thwarting the Houthis and al Shabaab, which have forged ties since 2024 and pose a shared threat to both Ethiopia and Israel.

Israel in Northern Somalia

Israel has grown its partnership with Somaliland to develop strategic depth in the Red Sea and contain Turkish influence (Table 2). Israel became the first country to recognize Somaliland’s statehood in December 2025.³⁶⁶ Ethiopia and Israel have since colluded to fabricate flight plans for Israeli officials visiting Somaliland over FGS objections.³⁶⁷

Israel likely wants to establish a military presence in Somalia to project power into the southern Red Sea, including Yemen. Numerous reports since 2024 have claimed that recognition negotiations

included Somaliland granting Israel a Red Sea base, although Somaliland officials have repeatedly denied these reports.³⁶⁸ An Israeli base in Somaliland would expand Israel’s ability to monitor Red Sea threats near the vital Bab el Mandeb choke point, including Iranian weapons shipments to the Levant and Yemen, and put the Israel Defense Forces in closer range to Houthi-controlled territory in Yemen. Israel is also likely following the UAE’s playbook of turning to Somaliland to decrease its reliance on Eritrea, which currently hosts its southernmost Red Sea base, to carry out these functions and strengthen ties with Ethiopia.³⁶⁹

Israeli recognition of Somaliland aligns with its pro-UAE and anti-Turkey outlook in the region. Turkey is a major partner of the FGS and has signed numerous defense and economic agreements with Somalia; these deals de jure include Somaliland and its coastal territory.³⁷⁰ A strong and independent Somaliland contains Turkish influence in southern

Somalia and inhibits Turkey from using its partnership with the FGS to increase its presence in the Bab el Mandeb strait. Somaliland announced that it would join the Abraham Accords, bringing it further into the Israel-UAE axis.³⁷¹

Somaliland has the potential to help Israel advance several other objectives, including resettling Palestinians and strengthening its economy. Several news outlets reported throughout 2025 that Israeli and US officials had discussed resettling forcibly removed Gazans with FGS and Somaliland officials.³⁷² President Trump said during an early August press conference that he was “looking into” recognizing Somaliland if it accepted Palestinians, and Israeli officials told CNN later that month that Somaliland was one of five countries in talks to accept displaced Palestinians in exchange for “significant financial and international compensation.”³⁷³ The Palestinian Authority and FGS reiterated these accusations in the aftermath of Israel’s recognition of Somaliland.³⁷⁴ Somaliland officials have denied these accusations, but Israeli officials have not publicly addressed the issue.³⁷⁵

Somaliland presents Israeli companies with opportunities in sectors such as agriculture, energy, and infrastructure. Israel could use preferential access to Somaliland’s Berbera port to strengthen trade ties with the region, particularly Ethiopia. Israeli expertise in agriculture and water resource management would help Somaliland strengthen its livestock export sector.³⁷⁶ Israeli recognition could also open the door to greater capital and investment into energy and resource extraction sectors that have struggled to attract investment due to Somaliland’s international isolation.³⁷⁷

Israel in Sudan

Israel has refrained from overtly backing any side in Sudan’s civil war due to internal divides about whom to support. Israel had cultivated strong ties with both Burhan and Hemedti before the outbreak of the civil war. Burhan met with Israeli Prime Minister Benjamin Netanyahu in 2020, while the then-Mossad director met with Hemedti in 2020 and 2021.³⁷⁸ Israeli officials met with both leaders in Sudan multiple other times after Sudan joined the Abraham Accords.³⁷⁹

The different communication channels with the two Sudanese leaders have divided Israeli officials on the civil war.³⁸⁰ Israeli diplomats established a positive relationship with Burhan as part of the Abraham Accords and view cooperation with Burhan as the easiest way to advance the now-stalled normalization process. Burhan has even approached Israeli officials to finalize normalization and cut ties with Iran in exchange for military aid at multiple points in the civil war.³⁸¹ Mossad officials, however, have a closer relationship with Hemedti. The split opinion led Israel to offer to mediate early in the war.³⁸²

Saudi Arabia

Saudi Arabia in Sudan

Saudi Arabia has steadily grown its ties with the SAF since the 2010s, and the partnership has continued to expand as Saudi Arabia seeks to stabilize Sudan and counter Emirati influence (Table 3). Saudi Arabia cultivated ties with the SAF and RSF during the Bashir regime alongside the UAE, as the Gulf allies peeled Bashir away from Iran and secured Sudanese support for its military intervention in Yemen.³⁸³

Saudi Arabia continued to work alongside the UAE in supporting Sudan’s military factions at the expense of civilian and democratic governance in the civilian-led transition period, which ended when the RSF and SAF overthrew the civilian-led transitional government in 2021. However, the kingdom prioritized relations with the SAF after Bashir’s fall, as it viewed the SAF as the most capable and legitimate institution for domestic and regional stability.³⁸⁴

Saudi Arabia initially adopted a neutral mediating role when the Sudanese civil war began. Saudi Arabia secured several failed ceasefires during several rounds of talks in the Jeddah process in 2023.³⁸⁵ Multiple reports allege that Saudi Arabia supported the SAF diplomatically throughout this initial period and tacitly approved of Egyptian support for the SAF.³⁸⁶ Saudi Arabia has also worked with Egypt and the United States on pressuring the SAF to reduce its Islamist ties.³⁸⁷

Saudi Arabia has taken a gradually more assertive stance since the RSF launched a parallel administration

Table 3. Key Saudi Partnerships in the Wider Horn of Africa

<p>Djibouti</p>	<p>Defense. Saudi Arabia signed a deal to establish a naval base in Djibouti in 2017 but has not followed through on the agreement.</p> <p>Investment. Saudi firms have signed several contracts to establish a Saudi-African trade corridor via Djibouti, including a logistics zone, a framework for a port concession, and an oil refinery.</p>
<p>Eritrea</p>	<p>Investment. Eritrea and Saudi Arabia have reportedly discussed a multibillion-dollar Saudi investment into the Eritrean port of Assab.</p>
<p>Somalia</p>	<p>Defense. Saudi Arabia is reportedly negotiating a defense pact with Egypt and Somalia.</p> <p>Investment. Saudi and Somali officials have discussed increasing cooperation on oil and gas and in other sectors.</p> <p>Politics. Saudi Arabia has repeatedly affirmed its support for Somalia’s territorial sovereignty amid attempts to recognize Somaliland independence.</p>
<p>SAF</p>	<p>Defense. Saudi Arabia is reportedly negotiating and financing a \$1.5 billion arms package between the SAF and Pakistan.</p> <p>Politics. Saudi Arabia has strongly rejected the RSF’s parallel government and insisted on Sudan’s territorial unity.</p>

Source: Authors’ research from open sources.

in February 2025.³⁸⁸ A Saudi statement responding to the RSF’s move said Riyadh rejected “any unlawful measures or actions outside the official institutions of the Republic of Sudan that could undermine its unity.”³⁸⁹ This statement encapsulates the Saudi viewpoint, which is shared with Egypt, that the SAF is a legitimate Sudanese institution—and the RSF is not—and that Sudanese territorial unity is a red line.

Economic and military support has followed this diplomatic shift. Saudi officials traveled to Port Sudan in March 2025 to discuss investing in reconstruction efforts in the soon-to-be SAF-controlled Sudanese capital, Khartoum, and Burhan traveled to Riyadh to meet with Saudi Crown Prince Mohamed bin Salman (MBS) to formally launch efforts to increase bilateral cooperation.³⁹⁰ Reports emerged after Burhan met

with MBS again in December 2025 that Saudi Arabia was facilitating and possibly financing a nearly \$1.5 billion arms deal of 10 attack aircraft, over 200 drones, and air defense systems.³⁹¹ Saudi Arabia’s state-run gold refinery offered to start buying Sudanese gold in January, possibly helping finance the arms sale and simultaneously siphoning Sudanese gold exports to the UAE.³⁹²

Saudi Arabia in Eritrea and Ethiopia

Saudi Arabia has increased diplomatic and economic cooperation with Eritrea to expand its port network and promote regional stability vis-à-vis Ethiopia and its Emirati sponsor (Table 3). The UAE was aligned with Saudi Arabia to cultivate stronger partnerships with both Eritrea and Ethiopia in the 2010s as the

Gulf allies sought to gain support for their intervention in Yemen. Eritrea and Saudi Arabia signed an agreement to counter terrorism and address mutual maritime threats in 2015.³⁹³ The Gulf allies helped mediate the 2018 Jeddah agreement, which normalized ties between the two rival neighbors and infamously won Abiy the 2019 Nobel Peace Prize.³⁹⁴ The Gulf partners then backed Abiy's mediation efforts to normalize ties between Djibouti and Eritrea, which resulted in an agreement in Saudi Arabia that ended their decade-long border dispute.³⁹⁵

Saudi Arabia has slowly grown ties with Eritrea in recent years. Saudi Arabia included Eritrea in the Red Sea Council but excluded Ethiopia, and Isaias has traveled to Saudi Arabia to meet with MBS and other Saudi officials at least three times since 2020.³⁹⁶ Eritrean and Saudi officials have discussed regional stability and security in all meetings and possible plans for a multibillion-dollar Saudi investment into the Eritrean port of Assab.³⁹⁷ Isaias has accused the UAE of colluding to destabilize the region and called for Saudi Arabia to play a greater role in bringing "peace and stability in the wider region, and in Eritrea's immediate neighborhood."³⁹⁸

Saudi Arabia has maintained a more limited but still functional relationship with the pro-Emirati Abiy regime. High-level Ethiopian and Saudi officials have met on a regular basis and emphasize the importance of their diplomatic, economic, and political cooperation.³⁹⁹ However, Abiy has met with MBS only once since 2020, and it was on the sidelines of the 2023 Saudi-African forum, not as part of a bilateral visit.⁴⁰⁰ The majority of cooperation has focused on economic cooperation, including Ethiopian labor migration to Saudi Arabia and newer Saudi initiatives to boost investment in Ethiopia.⁴⁰¹

Saudi Arabia in Djibouti

Saudi Arabia has increased cooperation with Djibouti as it seeks to capitalize on Djibouti's rift with the UAE to counter the Emirati Red Sea port network and promote regional stability (Table 3). Saudi firms have signed several key contracts to establish a Saudi-African trade corridor via Djibouti since 2024. The first contract is a 92-year lease for a logistics zone near the

main port area in Djibouti city, which will serve as a hub for exports across Africa.⁴⁰² A Saudi firm signed a framework agreement in November 2025 for a 30-year concession to develop a separate port in Tadjourah and establish a free-trade zone, with a full agreement expected in March 2026.⁴⁰³ A Saudi firm also plans to build a \$12.7 billion oil refinery in Djibouti, capable of processing 300,000 barrels a day and turning Djibouti into a regional energy logistics hub.⁴⁰⁴

Djibouti and Saudi Arabia cooperate diplomatically on regional security concerns. Regional instability is an existential threat to Djibouti, which is the smallest country on the Red Sea and is economically dependent on serving as a trade gateway to Africa via its Red Sea coast. President Guelleh has repeatedly emphasized that security cooperation with Saudi Arabia is key to ensuring Red Sea security.⁴⁰⁵ Guelleh emphasized the importance of "regional and global cooperation" and specifically called the UAE's regional policy "deeply destabilizing" in a 2025 interview, clearly framing Djibouti in the broader Saudi umbrella.⁴⁰⁶ Saudi Arabia had discussed building a military base in Djibouti in 2017, but it has not yet followed through on these plans.⁴⁰⁷

Saudi Arabia in Somalia

Saudi Arabia and Somalia have been expanding their diplomatic partnership to be more multidimensional, as Saudi Arabia seeks to protect Somalia's territorial integrity to counter Emirati partnerships with Somali regional governments (Table 3). Saudi Arabia never had a strong presence in Somalia amid Emirati and Turkish competition in the country, but it has played a growing role since 2024.⁴⁰⁸

Saudi Arabia reaffirmed its "utmost" support for Somali territorial integrity in statements in the immediate aftermath of the Ethiopia-Somaliland port deal and a subsequent meeting between President Mohamed and MBS in Riyadh in 2024.⁴⁰⁹ The Somali and Saudi foreign ministers met in Riyadh in early 2026 after Israel recognized Somaliland to discuss supporting Somali sovereignty and other bilateral cooperation.⁴¹⁰ Somalia has reciprocated this support by backing Saudi Arabia's position in Yemen amid heightened tensions with the UAE.⁴¹¹

These diplomatic ties are becoming a strategic partnership. Saudi Arabia signed unspecified security and oil and gas cooperation agreements with Somalia and discussed increasing cooperation in various other fields during the 2024 meeting between MBS and Mohamud.⁴¹² Saudi Arabia is seeking to broker further agreements in early 2026 to create a pact with Egypt and Somalia on Red Sea security and other military cooperation.⁴¹³

Turkey

Turkey in Somalia

Somalia has been an anchor partner for Turkey since 2011, and this partnership has grown alongside intensifying regional competition (Table 4). Turkey has used humanitarian aid and soft power to spearhead its entry into Somalia since the 2010s. Somalia was facing a famine, and AU forces had just expelled al Shabaab from Mogadishu after the al Qaeda-affiliated insurgents nearly toppled the internationally recognized government. Erdoğan visited Somalia in 2011 amid the famine, becoming the first non-African head of state to visit Somalia in 20 years.⁴¹⁴ Erdoğan claimed in 2022 that Turkey has provided more than \$1 billion in aid since his 2011 visit, and this aid has served as a foundation for growing relations in subsequent years.⁴¹⁵ Erdoğan's AKP signed an agreement to increase cooperation with Somalia's ruling party in January 2025.⁴¹⁶

Turkey is the leading foreign investor in Somalia's transportation infrastructure, which has contributed to growing trade ties. The Turkish government secured 20-year contracts in 2013 for the Erdoğan-linked Albayrak Group and Favori to develop and operate the Mogadishu airport and seaport.⁴¹⁷ Numerous reports have criticized Turkish operation of the ports, accusing the Turkish companies of bribery, money laundering, predatory practices, and covering up abuses made by Turkish employees.⁴¹⁸ Turkish ownership of the airport and seaport in Mogadishu has contributed to a significant increase in Turkish exports to Somalia, which reached \$424 million in 2023, but Somali exports to Turkey have decreased over the same period.⁴¹⁹

Turkish counterterrorism cooperation has significantly increased in the years since Turkey first entered Somalia. Turkey signed an initial framework agreement in 2010 and several more military cooperation deals in the years afterward, but these efforts did not become operational until 2015.⁴²⁰ Turkey established the TURKSOM military base in Mogadishu in 2017—its first overseas military base—to significantly expand the training mission.⁴²¹ Turkey also has trained at least 16,000 Somali soldiers, including elite Gorgor commando units and Haramcad special police units.⁴²² Both have proved more effective than the regular Somali National Army units, although rival government factions have politicized and weaponized them in government infighting.⁴²³ Turkish forces in Somalia also operate TB2 and Akıncı drones in Somalia and have carried out more than a dozen strikes in support of Somali forces.⁴²⁴ Turkey has at least 800 personnel deployed in Somalia as part of the training and advisory mission.⁴²⁵

Turkey and the FGS have significantly strengthened defense ties beyond the counterterrorism realm in response to attempts to recognize Somaliland. Turkey and Somalia signed defense and economic deals in February 2024 that were a clear counter to Ethiopia's port deal with Somaliland and suspected Emirati complicity, although Somali officials denied the two were connected at the time.⁴²⁶ Turkey agreed to deploy an unspecified number of forces to Somalia to protect Somali territorial waters and essentially rebuild the defunct Somali navy.⁴²⁷ Turkey framed the deployment as an opportunity to increase its geopolitical influence in the broader Horn of Africa–Red Sea region by combating piracy, illegal fishing, and other multilateral issues.⁴²⁸ Turkey signed a separate deal to build a spaceport in Somalia to test missiles as part of ballistic missile and space programs and began construction at the end of 2025.⁴²⁹

Turkey has capitalized on Somaliland tensions to secure further favorable economic arrangements with the FGS. Turkey signed an economic agreement that granted it a guaranteed 30 percent stake in Somalia's offshore exclusive economic zone, which includes offshore oil and gas deposits, in tandem with the February 2024 military deal. Turkey discovered up to

Table 4. Key Turkish Partnerships in the Wider Horn of Africa

<p>Ethiopia</p>	<p>Defense. Turkey provided drones to Ethiopia during the Tigray war and sent an additional batch of drones in 2021.</p> <p>Investment. Turkey has invested up to \$2.5 billion in projects in the country at the end of 2021, according to Ethiopian and Turkish officials.</p> <p>Political. Turkey has supported Ethiopia’s position on the GERD in the dispute with Egypt and sought to mediate various regional disputes involving Ethiopia.</p>
<p>Somalia</p>	<p>Counterterrorism. Turkey has trained at least 16,000 soldiers, provided Somalia with drones, and established its first overseas base in Somalia in 2017, which now houses at least 800 Turkish personnel supporting counterterrorism efforts.</p> <p>Defense. Turkey signed a defense deal with Somalia in 2024 to deploy an unspecified number of forces to Somalia to protect Somali territorial waters and essentially rebuild the defunct Somali navy, and Turkish officials have since reportedly discussed establishing a naval base on the northern Somali coast.</p> <p>Investment. Turkish companies have invested millions of dollars into developing the Mogadishu air and sea ports after securing operating concessions in 2013, and Turkey signed a deal with Somalia in 2024 that gave it a 30 percent stake in Somalia’s offshore exclusive economic zone.</p> <p>Humanitarian Aid. Turkish officials claimed in 2022 that Turkey has provided over \$1 billion in aid since 2011.</p> <p>Political. Turkey has repeatedly supported Somalia’s sovereignty amid efforts to recognize Somaliland independence.</p>
<p>SAF</p>	<p>Defense. Turkey has supplied drones to the SAF during the civil war and began coordinating drone strikes against the RSF with Egypt in late 2025.</p> <p>Investment. SAF officials offered the Abu Amama port to Turkey in 2024 and have discussed granting Turkey concessions to Sudanese copper, gold, and silver mines as part of arms sale negotiations.</p>

Source: Authors’ research from open sources.

20 billion barrels of commercially viable oil during exploration activities in 2025 and announced plans to send a drilling vessel in 2026.⁴³⁰ A Turkish military-linked company signed an agreement to develop

Somali fisheries, which are also part of Somalia’s offshore exclusive economic zone, as part of various subsequent agreements.⁴³¹

Turkey in Sudan

Turkey has been a major player in Sudan for over a decade and has backed the SAF in the ongoing civil war (Table 4). Erdoğan and the AKP shared significant ideological similarities with Bashir's Sudanese Islamist Movement, which facilitated strengthening ties throughout the 2010s despite Sudan being an international pariah.⁴³² Turkish trade grew from \$295 million to \$480 million between 2013 and 2020, and Turkish investment grew from \$300 million to \$600 million over the same period.⁴³³ The two countries also conducted joint military drills in 2014 and 2015 and built broader defense industrial ties throughout the decade.⁴³⁴

Bashir's ouster tempered relations and slowed cooperation on a series of key agreements signed in 2017. Sudan and Turkey signed over a dozen deals amounting to \$650 million in investment pledges across multiple sectors when Erdoğan visited Khartoum in 2017.⁴³⁵ The deals included military training plans and a 99-year Turkish lease to Suakin Island, a formerly Ottoman-controlled island in the Red Sea off the coast of northeastern Sudan.⁴³⁶ However, Turkey has remained a relevant partner in the post-Bashir era thanks to Turkish diplomatic outreach, heightened soft-power efforts, and the continued influence of the Turkish-aligned SAF in Sudan.⁴³⁷

Turkey has further strengthened its influence in Sudan and the wider region as an increasingly important backer of the SAF since the civil war began. Turkey initially tried to adopt a mediator role but quickly began bolstering SAF airpower through weapons sales involving Bayraktar Akıncı and TB2 drones, air-to-surface missiles, and ground command centers in the first year of the war.⁴³⁸ The SAF offered the Abu Amama port to Turkey after revoking the UAE's rights to the port due to Emirati support for the RSF, and SAF officials have discussed granting Turkey concessions to Sudanese copper, gold, and silver mines as part of arms sale negotiations.⁴³⁹ Turkey began coordinating drone strikes with Egypt in support of the SAF near the Egyptian-Sudanese border in November 2025 and is reportedly planning to send more weapons systems.⁴⁴⁰

Turkey in Ethiopia

Turkey has a strong partnership with Ethiopia, which positions Ankara as a possible mediator between Ethiopia and Ethiopia's Turkish-aligned African rivals (Table 4). Turkey has dramatically increased development assistance and other soft-power efforts in Ethiopia since the AKP took power in 2002, including supporting hundreds of education, health, and water projects.⁴⁴¹ Turkish businesses have followed these development efforts, multiplying from one in Ethiopia in 2003 to over 200 today.⁴⁴²

Turkey has invested up to \$2.5 billion in projects in the country at the end of 2021, according to Ethiopian and Turkish officials, making it the second-largest foreign investor in Ethiopia following China.⁴⁴³ The largest investment was the \$1.7 billion Awash-Weldiya railway project, which aimed to connect central and eastern Ethiopia to trade corridors to Djibouti in northern Ethiopia. The Tigray war paused the project, however, and construction has yet to resume, with the Turkish construction company Yapı Merkezi and Ethiopian Railway Corporation in arbitration over compensation claims.⁴⁴⁴

Turkey strengthened its defense partnership with Abiy by providing drones during and since the Tigray war. Ethiopia used at least four Turkish-provided TB2 Bayraktar drones to repel a Tigrayan offensive on Addis Ababa in 2021 and in subsequent offensives the following year that ultimately ended the Tigray war.⁴⁴⁵ Ethiopia acquired an unspecified number of higher-end Akıncı drones in 2024.⁴⁴⁶

Turkey has strengthened already solid diplomatic and political ties with Ethiopia since Abiy took power. Turkey has been a steadfast supporter of the GERD for years, largely due to the mutual Ethiopia-Turkey rivalry with Egypt in the 2010s.⁴⁴⁷ The AKP signed an agreement to increase research, consultations, and information sharing with Abiy's ruling Prosperity Party in January 2025.⁴⁴⁸

Turkey has attempted to mediate various regional disputes involving Egypt, Ethiopia, Somalia, and Sudan. Turkey mediated several rounds of negotiations between Ethiopia and Somalia in 2024 that resulted in the Ankara Declaration, an agreement that eased the Somaliland port deal dispute.⁴⁴⁹ The

Table 5. Key Qatari Partnerships in the Wider Horn of Africa

Somalia	<p>Development. Qatar signed a defense agreement in Qatar in 2026 that included provisions for training, salary payments, and efforts to bolster Somali defense capabilities.</p> <p>Investment. Qatar invested \$200 million for road construction in Somalia in 2017.</p> <p>Political. Qatar has repeatedly defended Somali sovereignty amid efforts to recognize Somaliland.</p>
SAF	<p>Defense. Qatar funded the SAF’s acquisition of Chinese fighter jets in August 2024 and reportedly sent further arms shipments in 2025, including Chinese drones.</p> <p>Investment. Qatar and Sudan agreed to build a gold refinery in Doha for Sudanese gold exports in 2024.</p>

Source: Authors’ research from open sources.

compromise theoretically provided Ethiopia with commercial sea access via ports in southern Somalia, which Turkish companies would help upgrade and operate, and reaffirmed Ethiopian support for Somalia’s “sovereignty, unity, independence, and territorial integrity.”⁴⁵⁰ Turkey has also offered to mediate between Sudan and Ethiopia to resolve their border disputes in 2021.⁴⁵¹ Unconfirmed reports claim that senior Turkish officials engaged in shuttle diplomacy between Egypt and Ethiopia as part of visits to both countries in 2024.⁴⁵²

Qatar

Qatar in Sudan

Qatar has focused most of its efforts in the Horn on strengthening its preexisting relationship with Sudan (Table 5). Qatar had extensive ties with the Bashir regime, partially thanks to their shared Islamist ideology. These connections enabled Qatar to mediate multiple agreements between the Bashir regime and Darfuri rebels dating back to 2003.⁴⁵³ Qatar’s partnership with Bashir helped it acquire the Jebel Ohier copper-gold mine in 2013 and establish a stake in the Abu Sari gold mine with a Turkish company.⁴⁵⁴ Bashir agreed to cut ties with Iran and support the

Saudi-Emirati coalition in Yemen but refused to cut ties with Qatar amid the 2010s Gulf crisis and Qatar blockade.⁴⁵⁵ Sudan signed a \$4 billion agreement in 2018 with Qatar to develop the Suakin port—in conjunction with Turkey’s separate 2017 deal—to help develop the port and build a naval dock.⁴⁵⁶

Bashir’s ouster degraded Qatari influence in Sudan until the Gulf détente created more space for Sudanese military authorities to reengage with Qatar. The SAF and RSF elements on the military side of the transitional government wanted to distance themselves from Qatar at the behest of their Emirati and Saudi sponsors. The civilian side of the government vehemently rejected Islamism and anyone associated with the former regime. Qatar bore the brunt of the backlash from both sides as a result. Sudanese authorities suspended several agreements with Qatar, refused to receive a Qatari delegation in 2019, and closed the local Al Jazeera bureau in Khartoum.⁴⁵⁷ Burhan visited Doha in 2021, months after the al Ula declaration ended the Gulf crisis, and said that he aimed to resume previously signed agreements with Qatar.⁴⁵⁸

The Sudanese civil war has provided a window for Qatar to further strengthen its position in Sudan, where it has quietly provided financial and military support to the SAF. Qatar funded the SAF acquisition

of eight Chinese fighter jets in August 2024.⁴⁵⁹ Qatar and Sudan had agreed to build a gold refinery in Doha to support Sudanese gold exports earlier in 2024.⁴⁶⁰ The refinery is a win-win that would help the SAF send some of the gold it currently sends to the UAE to Qatar. French and Sudanese media have reported that Qatar sent several arms shipments to Port Sudan in 2025, which included Chinese drones.⁴⁶¹ Burhan has since floated Qatar as a possible mediator amid the deadlock in other peace processes.⁴⁶²

Qatar in Somalia

Qatar has cultivated a utilitarian partnership with the FGS as its other main point of influence in the region (Table 5). Qatar formed a strong relationship with former Somali President Farmaajo in 2017, when Qatar faced regional isolation. Qatar allegedly helped fund Farmaajo's campaign, and Farmaajo appointed pro-Qatari officials in return.⁴⁶³ Farmaajo visited Qatar several times during his presidency, and Qatar invested \$200 million for road construction and other small infrastructure projects in Somalia in 2017, which is Qatar's largest infrastructure investment in the Horn to date.⁴⁶⁴ A Qatari firm discussed building a \$170 million port in central Somalia in 2017, although it never came to fruition.⁴⁶⁵

Qatar's and Somalia's growing relationship stalled after the Gulf crisis but has regained momentum as

regional competition has intensified since 2025. Qatar has not made any further major investments, which is a result of Qatar's more risk-averse and selective approach across the continent. These guiding principles likely took increased precedence after the end of the Gulf crisis, when Somalia became less useful as a counterweight to Qatar's Gulf neighbors. However, the two partners signed several bilateral agreements throughout 2025 related to increasing security cooperation, agricultural investments, trade, and coordinating various soft-power initiatives.⁴⁶⁶ The FGS signed another defense deal with Qatar on January 19, 2026, which included provisions for military training, salary provisions, and developing defense capabilities.⁴⁶⁷ The FGS likely signed the deal as a like-for-like swap with the UAE, which it kicked out of the country earlier in the month.

Qatar has been a much more reliable partner for the FGS in the diplomatic and political realm. Qatar has repeatedly defended Somali territorial unity and supported Somali criticism of direct Emirati cooperation with the Somali FMS as a violation of Somalia's sovereignty over the past decade.⁴⁶⁸ Qatari Emir Sheikh Tamim bin Hamad al Thani spoke with President Mohamud days after Israel's recognition of Somaliland to reiterate this stance, and Qatar publicly signed onto a multilateral statement condemning the recognition.⁴⁶⁹

III. Other Players

Iran and Russia: Instability Breeds Opportunity

Iran and Russia have strategic ambitions to project power in the Red Sea and adjacent waterways and are seeking Red Sea bases to support these efforts (Figure 22). Russia has pursued a Red Sea port since at least 2008 to protect its interests in regional shipping lanes and project power in the adjacent Indian Ocean and along NATO's southern flank in the Mediterranean Sea.⁴⁷⁰ Russian officials previously hoped a Red Sea base would enable Russia to upgrade its facilities in Syria and bolster its power projection in the Mediterranean Sea, but the uncertainty of its bases following the fall of Syrian dictator Assad in 2024 now makes a Red Sea base potentially important in reducing Russian reliance on Syria to project any power in the Mediterranean.⁴⁷¹

Iran has similarly sought to secure military positions on the Red Sea to support itself and its proxies to project power and attack international shipping in the Red Sea and the Gulf of Aden. Iran has used its surveillance capabilities in the Red Sea to support Yemeni Houthi attacks against Israel, US ships, and commercial shipping in the Red Sea.⁴⁷² This included using Iranian vessels in the Red Sea, including spy ships, to provide radar and electronic intelligence to the Houthis in 2024.⁴⁷³

Iran and Russia lack the economic weight to be major players in the region, but they have exploited isolated actors and regional instability to strengthen

their influence. Iran was a longtime partner of the Bashir regime in Sudan, bonding over their mutual status as international pariahs.⁴⁷⁴ Multiple Iranian presidents visited Khartoum from the 1990s to the 2010s, and there were strong economic and institutional ties between the SAF and Iran's Islamic Revolutionary Guards Corps (IRGC).⁴⁷⁵ Bashir eventually separated from the Iranian regime when he was no longer isolated, forging a transactional partnership with the Gulf states to stabilize his faltering economy.

Russia has exploited international backlash against Ethiopia and Eritrea at various points to cultivate loose partnerships. President Isaias, who dealt with US-backed UN sanctions from 2009 to 2018 and has faced US sanctions since 2020, happily accepted Russian outreach in the aftermath of Russia's invasion of Ukraine in 2022. President Isaias called on Russian President Vladimir Putin to end the "unipolar" US-dominated world order when meeting with Russian officials in 2023.⁴⁷⁶ The Kremlin also increased outreach to Ethiopia as Abiy faced backlash for the Tigray war.⁴⁷⁷ Russian outreach to less isolated powers, such as Djibouti, has been unsuccessful.⁴⁷⁸

Iran and Russia's general alignment in the region creates opportunities for cooperation. Iran and Russia demonstrated a willingness in Syria to work together to jointly base their forces and improve their interoperability to achieve shared objectives during the Syrian civil war.⁴⁷⁹ Ukraine's Main Military Intelligence Directorate reported in February 2024 that the IRGC and an Iranian proxy trained

Figure 22. Competition in the Greater Red Sea Area



Source: Liam Karr.

Russian drone operators at the Shayrat air base in Syria, for example.⁴⁸⁰ Russia has also provided diplomatic cover for Iran and its proxies in the Middle East and even considered transferring military equipment to the Houthis.⁴⁸¹

Russia

Russia has capitalized on the SAF's desperation to advance previously stalled talks to acquire a Red Sea naval base in Sudan. Russia signed a deal in 2017 with the Bashir regime to establish a naval base in Sudan, but the political instability in the years since has halted any implementation. The 2017 agreement gave Russia a 25-year lease and allowed it to station 300 troops and four warships, including nuclear-powered vessels, in Sudan.⁴⁸² The Kremlin subsequently supported both the RSF and SAF after Bashir's ouster in 2019 to pursue implementation of the port deal.⁴⁸³ Russia signed a preliminary deal with the transitional government in 2019, and SAF officials reviewed the deal again after it seized power with the RSF in 2021 before putting RSF leader Hemedti in charge of further negotiations.⁴⁸⁴ Hemedti had already cultivated relationships with Russian entities, including the infamous Wagner Group mercenaries, thanks to his influence in Sudan's gold sector.⁴⁸⁵

Russia has offered the SAF arms in exchange for implementing the 2017 deal. Russia was initially aligned with the RSF via Wagner, but Russian officials expressed their support for the SAF and offered the SAF "unrestricted military aid" in exchange for the base in April 2024.⁴⁸⁶ The shift was part of a broader effort to subordinate Russian military activities in Africa under the Kremlin and its strategic objectives in the aftermath of the Wagner mutiny in 2023.⁴⁸⁷

The SAF has repeatedly delayed implementing the agreement and resumes talks when it either needs weapons or wants to pressure the United States and the West.⁴⁸⁸ In October 2025, SAF and Russian officials discussed the port and additional mining rights in exchange for anti-aircraft systems and potentially fighter jets from Russia.⁴⁸⁹ The talks occurred amid a diplomatic breakdown between the SAF and US officials and an RSF offensive, and the SAF has reportedly halted the discussions since.⁴⁹⁰

Russia has strengthened naval cooperation with Ethiopia and Eritrea in recent years. Russia signed a deal for a Red Sea logistics base in Eritrea in 2018, but the deal has not come to fruition.⁴⁹¹ Russian officials reiterated their interest in a base in Eritrea in 2023 when meeting with President Isaias.⁴⁹² A Russian naval delegation then visited Eritrea in 2024 and met with President Isaias to discuss "prospects of Russian support to regional efforts" in the Red Sea and Horn of Africa.⁴⁹³

The Kremlin is growing military ties with Ethiopia. Ethiopia and Russia signed a military cooperation agreement in 2021 and naval training deal in March 2025.⁴⁹⁴ Ethiopia had signed a similar training deal with France in 2019, but France withdrew from the deal in 2021 due to human rights concerns related to the Tigray war.⁴⁹⁵ Russia also sold or transferred a Krasukha-4 electronic warfare system in 2023, two used 4.5-generation Su-30 fighter jets in 2024, and advanced trainer and light combat aircraft and a drone in 2025.⁴⁹⁶ Leaked files from the Russian defense company Rostec show that Ethiopia purchased six 4.5-generation Su-35 fighter jets in 2022, with the deliveries in preparation as of late 2025.⁴⁹⁷

Iran

Iran has sought to exploit the Sudanese civil war to reestablish influence in Sudan and support its Red Sea operations. Iran restored diplomatic ties with the SAF-backed Sudanese government in 2023 after a seven-year break.⁴⁹⁸ The renewed relationship has resulted in several high-level meetings and the exchange of ambassadors in 2024 and agreements to facilitate greater economic and political cooperation in 2025.⁴⁹⁹

Iran has provided military support to the SAF in the hopes of using Sudan's Red Sea coastline to support its military operations in the Red Sea. Iran began sending Mohajer-6 multi-role drones to the SAF beginning in late 2023, which have helped the SAF in battles around the capital.⁵⁰⁰ Iran has sought but failed to obtain an agreement for a naval base or dual-use port in Sudan in exchange for continued aid and a helicopter-carrying ship.⁵⁰¹ An SAF official said that Iran wanted the base to gather intelligence

on maritime traffic around the Suez Canal and Israel and to station warships at the base.⁵⁰² The SAF turned down the request due to fears it would alienate its Arab allies and the United States, and Saudi Arabia has since conditioned its military aid on the SAF no longer using Iranian drones.⁵⁰³

Radical Islamist Terrorists: Chaos Loves a Vacuum

Al Qaeda, ISIS, and the Houthis are all seeking to establish Islamic caliphates, destroy Israel, and expel the West from their areas of operation on both sides of the southern entrance to the Red Sea. The Houthis are the dominant faction in Yemen and have repeatedly conducted attacks against Western personnel and allies throughout the region.⁵⁰⁴ The Islamic State's Somalia Province (ISS) is based in Puntland and has assumed a growing role in funding and directing global IS operations in recent years. Al Qaeda's Somali affiliate, al Shabaab, generates around \$100 million per year and directly or indirectly controls significant portions of the southern half of Somalia, making it the largest and wealthiest al Qaeda affiliate in the world.⁵⁰⁵ Al Qaeda in the Arabian Peninsula (AQAP) is weaker than at its peak in 2015 but remains active in Yemen and the most externally minded al Qaeda affiliate worldwide.⁵⁰⁶

The Houthis have cultivated opportunistic tactical alliances with their al Qaeda rivals to address mutual interests. The Houthis and AQAP have cooperated on prisoner swaps for more than a decade and have established a limited military partnership since 2022 to fight Emirati-backed forces in southern Yemen.⁵⁰⁷ The partnership has included military support and cooperation, allegedly including Houthi provision of one-way attack drones in 2023.⁵⁰⁸ US intelligence indicated that the Houthis and al Shabaab have been discussing weapons transfers since 2024, likely seeking to create another alliance of convenience against a shared enemy—US forces and Western shipping in and around Somalia.⁵⁰⁹ The UN reported that the Houthis have shipped small arms and light weapons to al Shabaab since 2024, and the United States

interdicted “advanced conventional weapons” near the Somali coast that may have included surface-to-air missile components in 2025.⁵¹⁰

The Houthis

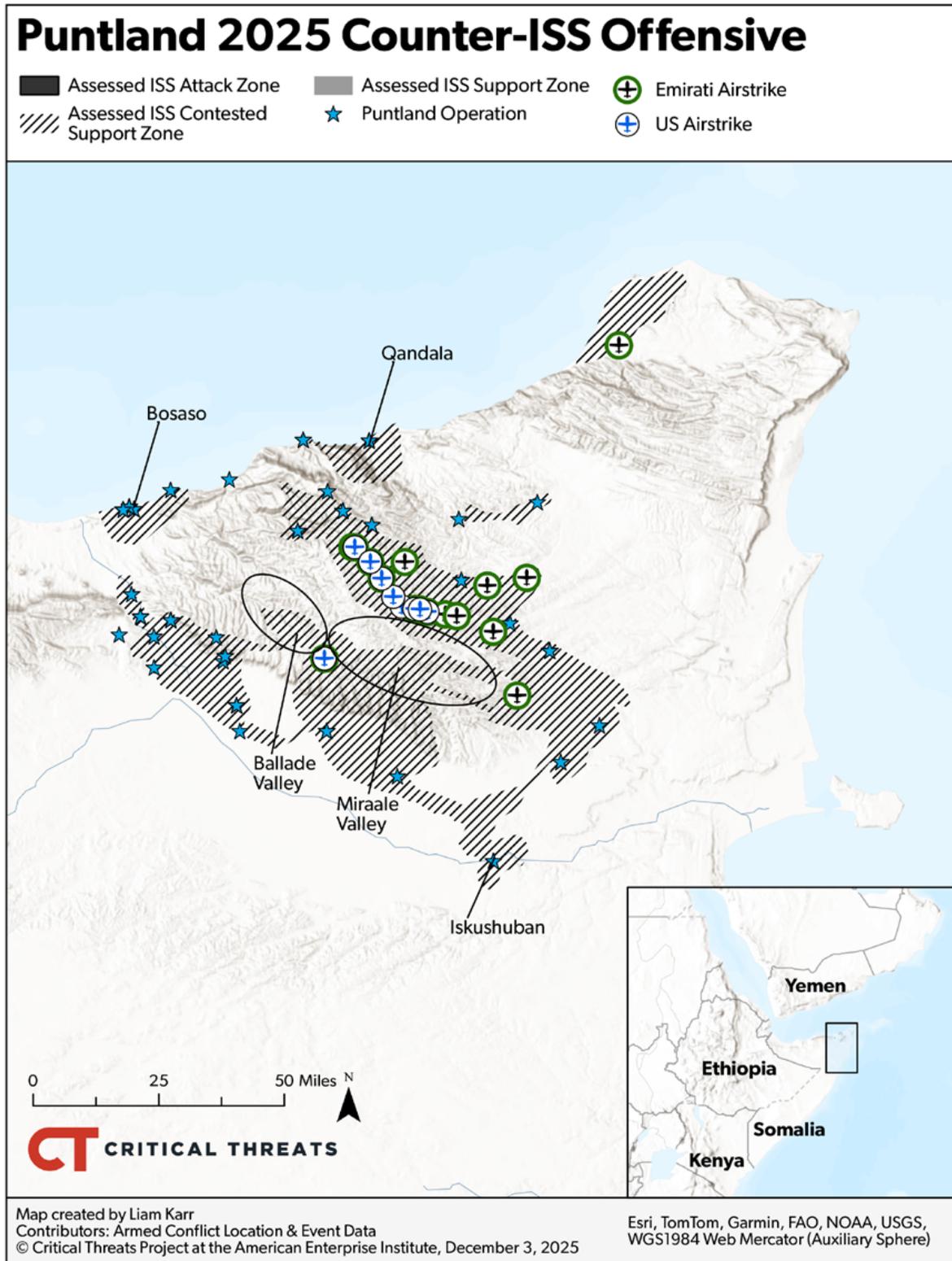
The Houthis retain significant regional strike capabilities despite Israeli and US strikes on Houthi infrastructure and leadership throughout 2025. The United States conducted an air campaign to render the Houthis “unable or unwilling to continue attacks that threaten US ships and freedom of navigation in the Red Sea” between March and May 2025.⁵¹¹ Israeli and US airstrikes throughout the year targeted major economic sites and killed key officials, including the top Houthi missile expert in May and the Houthi chief of general staff in October.⁵¹²

The group retains its strike capabilities and likely faces reduced pressure given the ceasefire and recent turmoil among the anti-Houthi coalition in Yemen.⁵¹³ The Houthis and the United States reached a ceasefire that limited attacks on American vessels in early May 2025, but the Houthis annulled the deal after the US strikes on Iran in June 2025.⁵¹⁴ The group conducted several more major drone and missile attacks on Israel and the Red Sea in mid-2025 before voluntarily slowing and eventually halting attacks in relation to the US-brokered ceasefire in Gaza.⁵¹⁵

ISS

ISS has become a key administrative and funding node in the global Islamic State network in recent years and remains degraded but operational after increased multilateral counterterrorism pressure in 2025. ISS had an estimated 600–2,000 fighters at the beginning of 2025 and had displaced al Shabaab fighters from the Cal Miskaad mountains to become the predominant Salafi-jihadi group in northern Somalia in April 2024.⁵¹⁶ The challenging terrain became a perfect sanctuary for IS leadership and foreign fighters. The United Nations has assessed that ISS founder Abdul Qadir Mumin may be IS's global caliph or the head of the General Directorate of the Provinces, which is the IS body that oversees regional affiliates and coordinates external attacks.⁵¹⁷

Figure 23. Puntland 2025 Counter-ISS Offensive



Source: Liam Karr; and Armed Conflict Location & Event Data, Data Export Tool, <https://acleddata.com/conflict-data/data-export-tool>.

ISS also plays a key logistic role, given its geographic position and that it hosts IS's East Africa office, al Karrar, which facilitates logistics between the IS global network and regional affiliates.⁵¹⁸ ISS is composed of primarily foreign fighters and serves as an initial point of contact for foreign fighters from Africa, Europe, and the Middle East joining other regional IS affiliates, including in the DRC and Mozambique.⁵¹⁹ ISS has generated millions through racketeering and has distributed funding and trainers across Africa and to global affiliates.⁵²⁰ ISS has directly provided financial support to the Afghanistan-based IS Khorasan Province, which has conducted multiple high-profile attacks in Asia and Europe.⁵²¹

The UAE and the United States supported Puntland-led counterterrorism operations that severely degraded ISS throughout 2025. Puntland forces launched an offensive against ISS in November 2024 to uproot ISS bases in the mountainous Bari region of eastern Puntland (Figure 23). The United States conducted more than 50 airstrikes targeting ISS in 2025, compared with three in 2024, and had conducted supply airdrops to Puntland forces in hard-to-reach areas.⁵²² US forces have participated in at least one and possibly two ground operations against high-value ISS targets in 2025.⁵²³ Puntland's president said in September 2025 that Puntland forces had degraded ISS by 95 percent, cleared ISS bases, seized arms stockpiles, and forced remaining fighters to scatter in small cells.⁵²⁴

Still, ISS is not totally defeated and remains active. ISS fighters have used the mountainous terrain and relationships with locals to evade capture. This includes nearly all senior-level officials, as operations have failed to remove many high-value targets from the battlefield. ISS fighters have integrated into the local population, and Puntland forces have arrested suspected ISS collaborators.⁵²⁵ ISS has continued attacking Puntland forces, including in previously cleared areas, leading the Puntland president to say that he would permanently station troops in certain regions.⁵²⁶

Al Shabaab

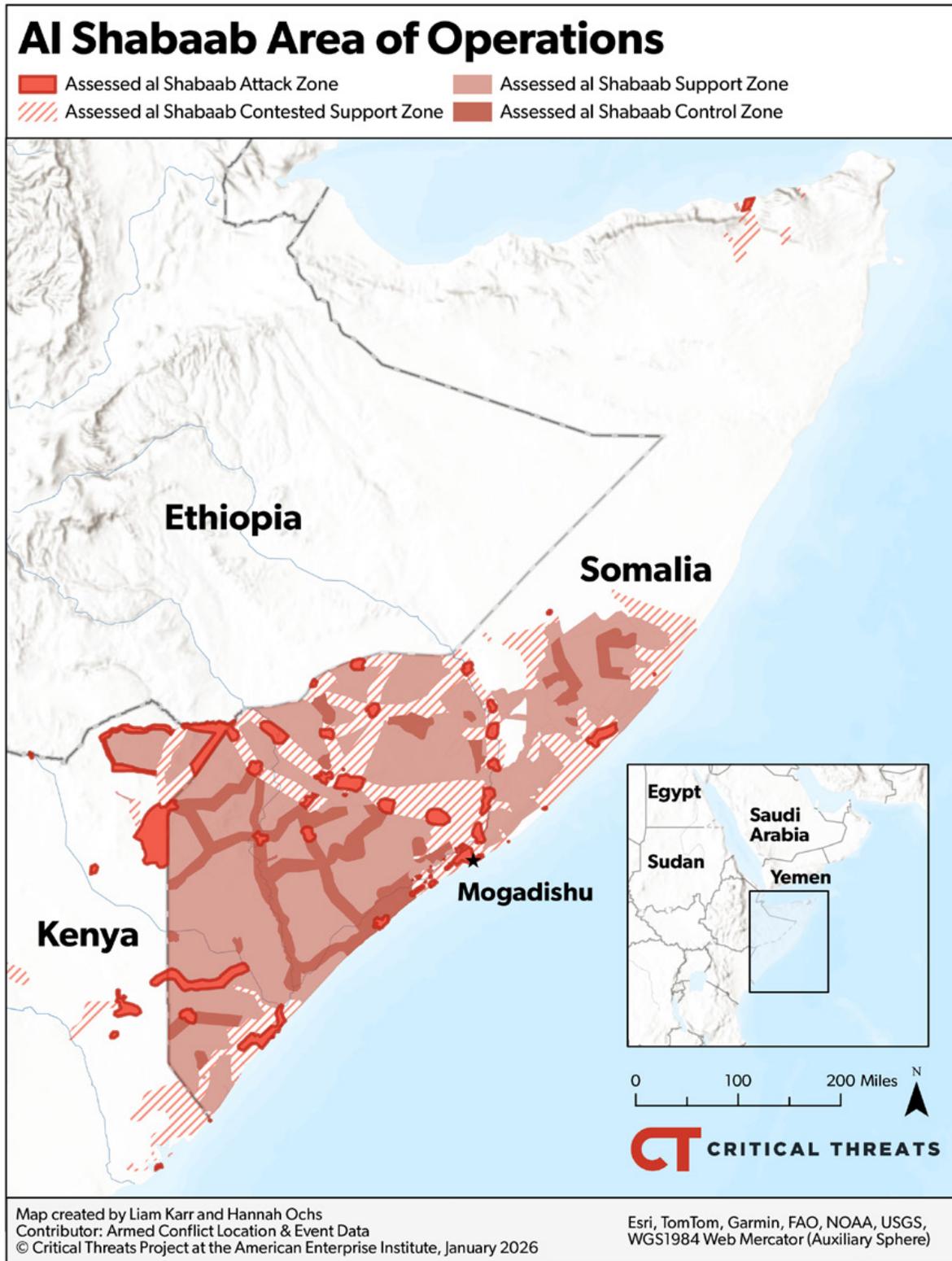
Regional tensions have weakened counterterrorism cooperation against al Shabaab and directly played into the group's recruitment narratives. Somali officials at all levels have politicized counterterrorism coordination against al Shabaab, undermining its effectiveness and threatening cooperation altogether. Jubbaland and FGS forces suspended cooperation and even clashed in 2024, jeopardizing counterterrorism operations against the al Shabaab heartland in the Jubba River Valley.⁵²⁷ The FGS's preoccupation with domestic and regional political tensions since 2024 has contributed to al Shabaab halting and reversing major counterterrorism gains that Somali forces had made in central Somalia in 2022 and 2023 (Figure 24).⁵²⁸

The FGS has linked participation in regional counterterrorism coordination with broader political alignment on its federalism issues, despite objections from local officials and international partners. President Mohamud sought to swap Ethiopian for Egyptian troops in the AUSSOM peacekeeping mission over the Somaliland port deal. Local state officials from pro-FGS South West and anti-FGS Jubbaland, where Ethiopian forces have operated for more than a decade, said that they opposed the decision.⁵²⁹ Regional troop-contributing countries have criticized Egypt's participation in the mission, warning that Egypt's inclusion would undermine the main objective of the mission to counter al Shabaab.⁵³⁰

Increased nationalistic sentiment in Somalia in reaction to Somaliland recognition efforts plays into al Shabaab's irredentist nationalist narratives. The group advocates an even wider "Greater Somalia," which goes beyond rejecting efforts to recognize Somaliland and includes Somali populations in Ethiopia and Kenya.⁵³¹

The recent tensions over Somaliland intersect with al Shabaab's preexisting anti-Ethiopian and antisemitic narratives, further energizing the group. Al Shabaab has branded Ethiopia a foreign, Christian occupier in Muslim Somali lands to gain recruits and funds since the group's inception after the Ethiopian invasion of Somalia in 2006.⁵³² Al Shabaab regularly attacks Ethiopian counterterrorism forces operating

Figure 24. Al Shabaab Area of Operations



Source: Liam Karr; and Armed Conflict Location & Event Data, Data Export Tool, <https://acleddata.com/conflict-data/data-export-tool>.

in Somalia and launched a major incursion into Ethiopia in 2022.⁵³³

The group similarly frames its criticism of Israel's existence as an occupation of Muslim land and has even directly compared Ethiopia to Israel.⁵³⁴ Somalia's international partners warned throughout 2024

that al Shabaab was using the Ethiopia-Somaliland port deal to recruit new fighters, and Somali officials have again raised the risk of al Shabaab strengthening in the aftermath of Israel's recognition of Somaliland.⁵³⁵

IV. How to De-Escalate

Looking Ahead: Escalation Likely

Recent infighting between Emirati and Saudi proxies in Yemen and heightened regional tensions over Somaliland likely foreshadow escalated proxy competition set to break out across the Red Sea. MBS personally requested that Trump intervene in Sudanese peace negotiations and pressure the UAE to cut support for the RSF when the two leaders met in November.⁵³⁶ Saudi officials and analysts believe that the UAE retaliated in Yemen, where the Emirati-backed Southern Transitional Council (STC) and allied forces seized key areas of Mahrah and Hadramawt governorates from Saudi-backed Republic of Yemen Government (ROYG) forces in early December 2025.⁵³⁷ The gains put the STC in control of key areas in all eight governorates in southern Yemen, enabling it to take steps toward fulfilling its aim of declaring an independent southern Yemeni state.⁵³⁸ ROYG forces launched a counteroffensive with Saudi air support to retake the areas on January 2 and retook the areas in the following days.⁵³⁹

Israel also moved to recognize Somaliland over this same period, with Emirati support, drawing heavy diplomatic backlash from Egypt, Qatar, Saudi Arabia, and Turkey. Twenty-one countries, including Egypt, Iran, Qatar, Saudi Arabia, Sudan, and Turkey, released a multilateral statement condemning Israel's move.⁵⁴⁰ Egypt, Qatar, and Saudi Arabia have made countermoves in early 2026, with Saudi Arabia pushing the FGS to annul its agreements with the UAE,

Qatar signing a defense agreement to fill the resulting void, and Egypt and Saudi Arabia discussing their own defense pact with the FGS.⁵⁴¹

Confrontation Brewing

Egypt and Saudi Arabia Make a Stand

Egypt and Saudi Arabia have adopted an increasingly assertive stance against the UAE and its partners since late 2025, likely fearing strategic encirclement from the UAE-Israel-Ethiopia axis and their substate allies (Figure 25). The RSF's capture of el Fasher, Sudan, in October solidified a de facto partition on Egypt's southern border in Sudan, with the RSF holding the momentum. Israel's and the UAE's actions in Somalia and Yemen in December 2025 raised the possibility that the Emirati-Israeli bloc could be the primary security guarantor on both sides of the southern entrance to the Red Sea at the Bab el Mandeb strait. The GERD and increasingly belligerent rhetoric between Ethiopia and Eritrea further threaten stability and Egyptian interests in the Nile River Basin and Red Sea. Outside of the Red Sea, Egypt and Saudi Arabia have both condemned continued Israeli military action in Gaza and Syria.⁵⁴²

Egypt has become more involved in direct military operations against the RSF since October 2025 than it has been since the initial phase of the war in 2023. The Egyptian army and SAF established a joint command force to monitor the Egypt-Libya-Sudan border area and a separate joint operations room in

central Sudan to support an SAF offensive to retake western Sudan.⁵⁴³ Egypt then began coordinating drone strikes launched from Egyptian soil against the RSF targeting RSF supply lines near the Egypt-Libya-Sudan border in coordination with the SAF and Turkey in November.⁵⁴⁴

The firm approach extends to the diplomatic realm, where President Sisi specifically outlined several red lines in Sudan after meeting with SAF head Burhan in December. Sisi noted that Egypt would preserve Sudan's territorial unity, reject "parallel entities," protect "state institutions," and refuse any secessionism.⁵⁴⁵ The red lines effectively mean Egypt will accept only a unitary Sudanese state that incorporates the SAF but not the RSF.

Saudi Arabia has also begun responding more forcefully to Emirati actions that it views as against its interests since November 2025 and drew a red line in Yemen after the STC takeover. MBS's appeal to Trump in November marked Saudi Arabia's first clear attempt to increase diplomatic pressure on the UAE, and Saudi officials have actively rallied diplomatic support for Saudi stances on Somalia and Yemen in subsequent weeks.⁵⁴⁶ Saudi airstrikes hit Emirati targets on December 29 and the STC in early January 2026.⁵⁴⁷ Saudi Arabia is also in talks to finance the SAF's \$1.5 billion arms purchase of 10 Karakoram-8 light attack aircraft, more than 200 scouting and one-way attack drones, and advanced air defense systems from Pakistan.⁵⁴⁸

The UAE Is Down but Not Out

The UAE will likely escalate proxy competition in the Horn of Africa despite recent setbacks. The UAE is reducing its visible presence in Somalia and Yemen but retains the ability to support its proxies. The UAE announced that it withdrew its military forces from Yemen and reportedly began drawing down its base in Puntland in January 2026, after the Somali and Yemeni governments annulled military agreements with the UAE in retaliation for its role in bypassing the FGS to cooperate with the FMS and backing the STC, respectively.⁵⁴⁹

The UAE has not committed to cutting support for either the STC or its partners in northern Somalia,

however, and Emiratis met with Puntland officials in Abu Dhabi shortly after the FGS announced that it would expel Emirati forces.⁵⁵⁰ Jubbaland, Puntland, and Somaliland all released separate statements rejecting the FGS's decision and insisting that they would continue cooperation, and the DP World ports in Puntland and Somaliland have continued operations.⁵⁵¹

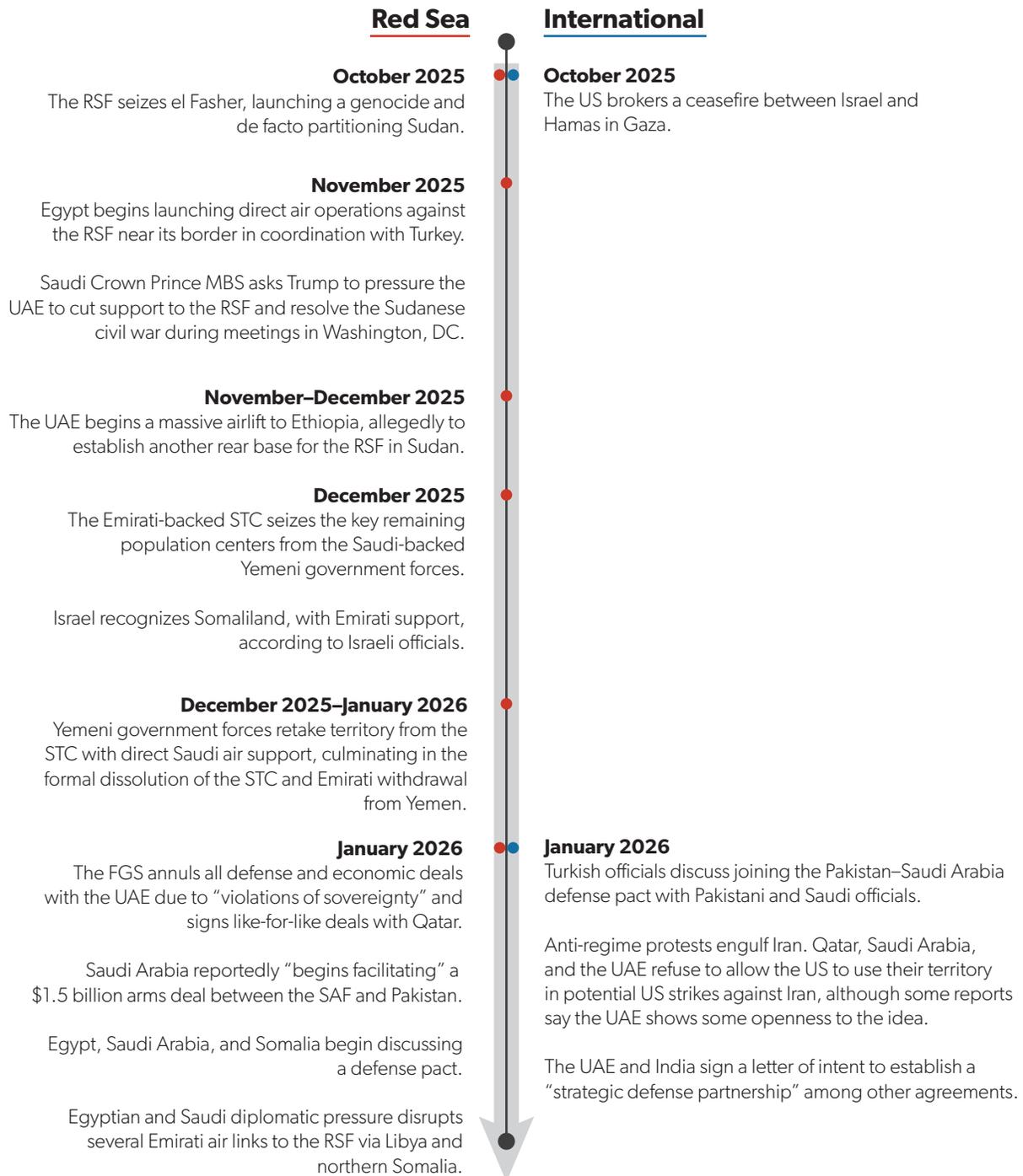
The UAE will likely pivot to Somaliland or other regions of Somalia after its reported withdrawal from Yemen. Israel's recognition of Somaliland and reports of a possible base raise the possibility of co-basing with the UAE. The UAE has already upgraded facilities in Berbera in recent years, completing construction of a modern military port, a deepwater dock, and an airstrip with hangars and support facilities.⁵⁵² Berbera is even closer than Puntland to the southern entrance to the Red Sea at the Bab el Mandeb strait and is less than 200 miles from Houthi-controlled territory in southern Yemen. The UAE also has other options in Somalia, such as backing the Somali opposition, which includes the anti-FGS and pro-UAE leadership in Puntland and Jubbaland, in the upcoming 2026 elections. The UAE signed a deal with the Jubbaland government to establish a base in 2023 and train state forces.⁵⁵³

Possible De-Escalation

Managed Conflict

Egypt, Saudi Arabia, and Turkey will seek to manage tensions and almost certainly try to avoid direct confrontation, much like their approach to Iran. Saudi Arabia's new posture is not a change in its strategic interest in regional stability and prioritization of domestic stability and economic growth, which a direct conflict would jeopardize. However, the new stance does signal that it views the Israel-UAE axis as a threat to these strategic interests that is equal to, if not greater than, the threat from Iran. Saudi Arabia had largely retreated from the region and assumed a predominantly diplomatic role in the early 2020s as part of its shifting focus inward. This conflict-averse outlook aimed to manage and mediate conflicts but failed to prevent the spread of what Saudi officials

Figure 25. Tensions Rupture



Source: Liam Karr.

view as destabilizing, Emirati-backed activity. The new Saudi stance aims to enforce stability while avoiding a major rupture in regional relations, mirroring its stance toward Iran.⁵⁵⁴

Egypt and Turkey cannot afford a rupture in relations with the UAE, given their reliance on Emirati funds, and are seeking to maintain a working relationship. An Abu Dhabi-based firm signed a deal with Egypt in 2024 to invest \$35 billion in Egypt, primarily on a project to develop the Ras al Hikma peninsula.⁵⁵⁵ The deal was critical in addressing a currency crisis and securing further financing from the International Monetary Fund to stabilize the Egyptian economy.⁵⁵⁶ The UAE is a critical Turkish investment and trade partner, with the latest annual figures showing \$16 billion in annual bilateral trade and \$6 billion in Emirati investment, and the two states cooperate on major defense, energy, and logistics projects.⁵⁵⁷

Egypt and Turkey have tried to balance ties and avoid a major confrontation despite the heightened tensions. Egyptian and Turkish leaders have remained in contact with their Emirati counterparts amid the ongoing regional spat.⁵⁵⁸ Egyptian and Emirati officials even met in late December—at the height of tensions over Emirati and Israeli actions in Somalia and Yemen—to move toward finalizing a Comprehensive Economic Partnership Agreement (CEPA).⁵⁵⁹

The UAE Repairs Relationships

The UAE could also seek to de-escalate to secure its current position and repair its international relationships. Israel and the UAE are facing mounting pressure in response to their actions beyond Saudi Arabia. The AU, EU, and Gulf Cooperation Council all released statements either explicitly or implicitly condemning Israel's move and reaffirming their support for Somalia's sovereignty.⁵⁶⁰ Russia spoke out against Israel at an emergency UN Security Council meeting on the recognition on December 29, and China has strongly condemned Somaliland recognition in line with its Taiwan policy and increased diplomatic coordination with the FGS on the issue.⁵⁶¹

The United States is increasing diplomatic pressure on the UAE over Sudan. US Secretary of State Marco Rubio fired a thinly veiled shot at the UAE in

November 2025 in comments made about the RSF, when he said, "Someone's giving them the money and someone's giving them the weapons, and it's coming through some country. And we know who they are, and we're going to talk to them about it and make them understand that this is going to reflect poorly on them."⁵⁶² Rubio has since called Emirati officials four times, the first such reported calls since February 2025.⁵⁶³ The UAE has aggressively lobbied the US Congress and the EU against adopting stronger positions against the UAE over Sudan.⁵⁶⁴

Some Emirati actions signal that either the UAE has decided to de-escalate or regional pressure has forced it to de-escalate. The STC's decision to dissolve is a major blow to Emirati influence in Yemen.⁵⁶⁵ Emirati military personnel have reportedly withdrawn from their positions in Yemen and have begun departing from Puntland.⁵⁶⁶

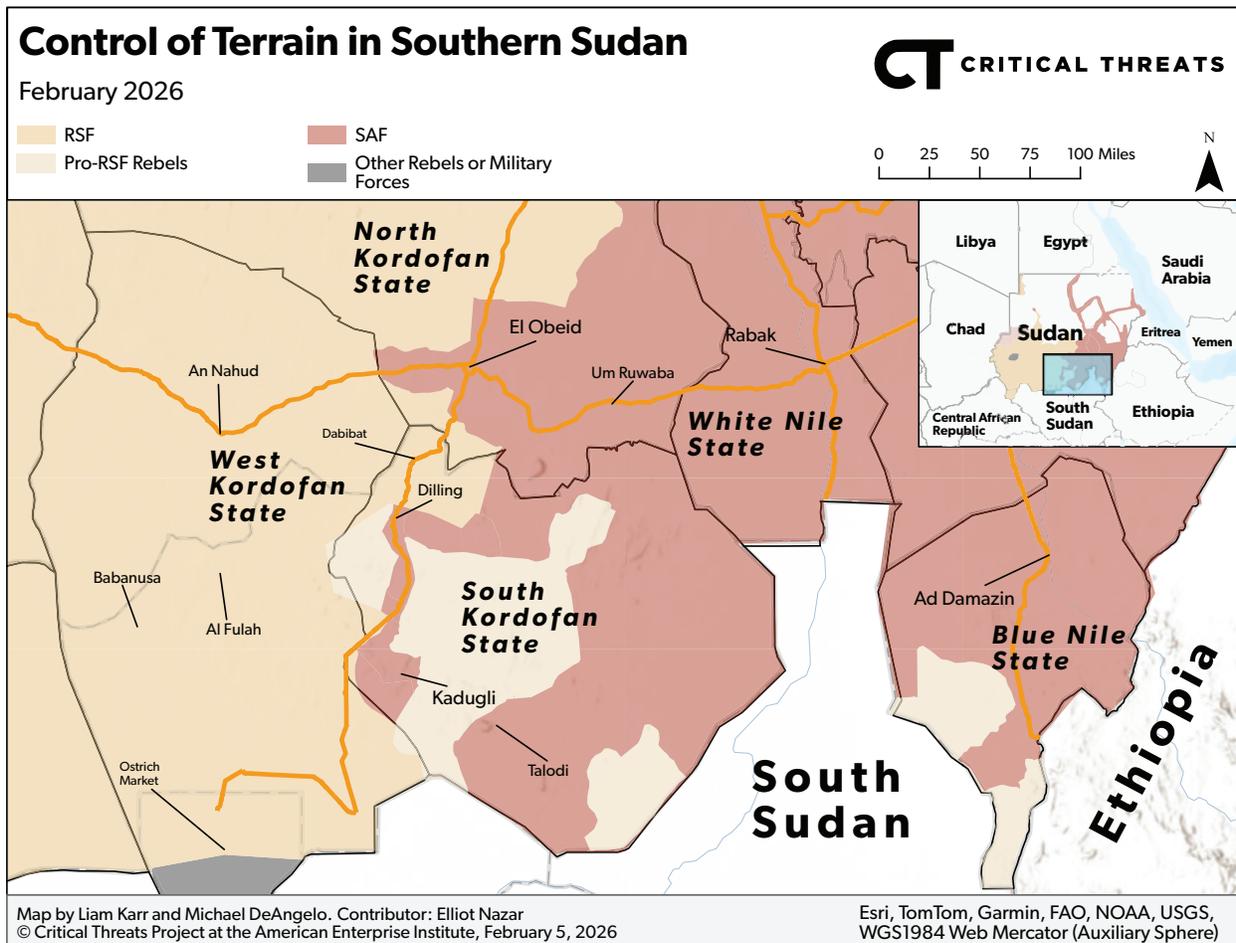
A more de-escalatory Emirati approach would likely manifest via its regional partners. Ethiopia would likely adopt a more conciliatory approach toward securing peaceful sea access without confidence in strong Emirati support. One clear pathway for Ethiopia would be cooperating with Djibouti and Saudi Arabia on the Tadjourah port project as another commercial sea-access option. The UAE notably refused to support another Ethiopian offensive in Tigray in 2022 and urged Abiy to open negotiations, which contributed to Abiy's decision to negotiate with the TPLF and end the war.⁵⁶⁷ The RSF would likely show more interest in ceasefire talks if it faced a reinforced SAF with decreased Emirati support. Emirati pressure on the RSF has led the RSF to call off planned offensives in rare instances.⁵⁶⁸

Key Issues on the Horizon

Sudan

All sides are escalating activity in Sudan, which has become even more important to the UAE amid the uncertainty in Somalia and Yemen (Figure 26). Egypt and Saudi Arabia have cooperated to disrupt Emirati air supply lines to the RSF in western Sudan since January 2026. Saudi Arabia likely closed its airspace to suspected Emirati weapons in early January, and

Figure 26. Control of Terrain in Southern Sudan



Source: Liam Karr; Michael DeAngelo; and Elliot Nazar.

Egypt pressured the eastern Libya authorities to temporarily close the Kufrah Airport in southeastern Libya, which was the RSF's largest support node and had received more than 100 Emirati cargo flights in the second half of 2025.⁵⁶⁹

Egypt and Saudi Arabia then rallied their Somali partners to disrupt the UAE's other supply route. Somalia closed its airspace to Emirati cargo and military flights on January 8 due to "hostile and destabilizing actions intended to undermine the sovereignty of Somalia."⁵⁷⁰ Somali officials referenced the UAE evacuating a Saudi-wanted STC official through Somalia as the "last straw," and Saudi officials reportedly encouraged their Somali counterparts to take action.⁵⁷¹ These moves temporarily disrupted the

main two air supply routes to Chad and southeastern Libya, which had flown through Puntland.⁵⁷²

The growing Egyptian, Saudi, and Turkish support for the SAF is likely in preparation for an SAF offensive to retake the initiative in central Sudan and push into the RSF's center of gravity in western Sudan. The SAF has been preparing to launch an offensive from el Obeid since late 2025.⁵⁷³ Hampered RSF supply lines, increased Egyptian and Turkish military coordination, and potential Saudi-funded arms are all setting conditions to give the SAF the upper hand in a massive new offensive. The SAF has recently captured several key areas in south-central Sudan in early 2026 and is now poised to open multiple potential lines of advance into western Sudan.⁵⁷⁴

The UAE is setting conditions to adapt to Egyptian-Saudi pressure and make its own move by opening another supply line and new front for the RSF via Ethiopia. Emirati weapons shipments to Ethiopia have increased since November, some of which open-source analysts have geolocated to western Ethiopia near the Sudan border.⁵⁷⁵ SAF officials claimed in December 2025 that the UAE is setting up a rear base in Ethiopia for a new RSF offensive in SAF-controlled eastern Sudan, and Reuters published an investigation in February 2026 confirming the existence an Emirati-funded RSF base holding 4,300 RSF fighters near the Ethiopia-Sudan border.⁵⁷⁶ RSF-aligned militias launched an offensive from positions in Ethiopia and South Sudan into eastern Sudan's Blue Nile state in January 2026, with the militias threatening to take control of a key border point between Ethiopia and Sudan at the time of publishing.⁵⁷⁷ A new RSF front on the SAF's flank from eastern Sudan would divert resources from central Sudan and create a second path by which the RSF can threaten to retake the Sudanese capital.

One clear off-ramp for all sides to de-escalate is the US-backed Sudan Quad peace talks among Egypt, Saudi Arabia, the UAE, and the United States. The UAE has repeatedly refused to accept any SAF presence in a future government, which has been a red line for Egypt and obstructed further progress.⁵⁷⁸

Northern Somalia

The two coalitions will likely intensify efforts to exert influence over northern Somalia. The UAE must strengthen its partnership with Somaliland if it seeks to maintain its posture in the Bab el Mandeb while fully withdrawing from Puntland and Yemen. Somaliland is also key to Emirati efforts to control Ethiopian trade, and the UAE would have to support Ethiopia's efforts to pursue access elsewhere if its plans in Somaliland collapse. The UAE could encourage allies such as Ethiopia or the United States to publicly support or recognize Somaliland as a pretext for increasing its own ties.

The newly created pro-FGS North East state serves as a counterpoint for the FGS and its allies. President Mohamud in January 2026 visited North East state,

a breakaway region from Somaliland that successfully ejected Somaliland forces from several districts during a revolt in 2023 and secured FGS recognition in July 2025.⁵⁷⁹ Mohamud formally inaugurated the new state and pledged that the FGS would facilitate "reconstruction and development" and provide security.⁵⁸⁰

Egypt, Saudi Arabia, and Turkey could equip the FGS to threaten Israeli or Emirati assets or personnel in neighboring Puntland and Somaliland from North East state or even establish positions in North East state to directly intervene on the FGS's behalf. Turkey is reportedly already in discussions to establish a base on the North East state coast and recently deployed F-16 fighter jets to Somalia, ostensibly for counterterrorism purposes.⁵⁸¹ Turkey has signed military deals with the FGS that authorize it to protect Somalia's territorial waters and remove "any external violations or threats."⁵⁸² Egypt already has 1,000 soldiers in Somalia as part of a bilateral agreement, and the impending Egypt-Saudi Arabia-Somalia pact may have similar clauses to the Turkey defense agreement.

Ethiopia and Eritrea

The clashes between Tigrayan and federal forces in the disputed regions heighten the risk of a direct conflict between Ethiopia and Eritrea. Ethiopian officials had escalated their rhetoric against Eritrea since late 2025, and the renewed clashes in Tigray seem to be the pretext Abiy and Isaias need to go to war. An anonymous Ethiopian military official alleged that Eritrean equipment and soldiers had begun infiltrating Tigray in early February and moving along key roads toward Tigrayan front lines. Anti-federal government sources and an independent journalist also alleged that the ENDF began a military buildup northern Ethiopia in early February, redeploying equipment and troops from other regions toward Tigray.⁵⁸³ The near miss in March 2025 underscores how quickly tensions in Tigray draw in Eritrea.

An Ethiopia-Eritrea war would threaten to replicate the current dynamics in Sudan, but this time on an interstate level. Middle-power backers would likely get pulled into another conflict, regardless of whether they explicitly support the reason the

African actors are going to war, much like in Sudan. The UAE would feel the need to back its key regional ally and see an opportunity to benefit from an Ethiopian victory. Egypt and Saudi Arabia would almost certainly view the war as another example of Ethiopian aggression and Emirati-backed instability, respectively, and take a strong approach in line with their recent regional stance.

The rival powers would also view the war as a zero-sum affair for Red Sea influence. An Ethiopian annexation of Assab would add another pro-Emirati port to the Red Sea at the expense of Egypt and Saudi Arabia. Egypt recently signed a deal for naval access at Assab, and both countries are considering investing in Assab.⁵⁸⁴ Ethiopia and Saudi Arabia's efforts to boost their economic ties could limit Saudi involvement compared with Egypt and position it as a possible mediator, with Saudi officials frequently discussing "regional stability" in recent high-level meetings with their Ethiopian and Eritrean counterparts.⁵⁸⁵ However, Saudi Arabia's stance on regional instability and the UAE would limit its tolerance for any perceived Ethiopian belligerence.

The UAE may be supporting an Ethiopian military buildup in northern Ethiopia, but not to the same extent as it has supported the RSF in Sudan or the new RSF rear base in Ethiopia. Several Emirati weapons shipments have gone to Bahir Dar, the capital of Amhara region in northern Ethiopia, since late 2025.⁵⁸⁶ An Ethiopian offensive against Eritrea would necessarily involve a buildup in the Amhara and Afar regions to invade Tigray and Eritrea.

CTP will publish at least four full-length reports in 2026 that will go into greater depth on these key tension points, potential courses of action, and their regional implications.

Recommendations: How to De-Escalate

The United States should seek to avoid a regional proxy war between multiple US allies, as it would be catastrophic for US interests on both sides of the Red Sea and cause a humanitarian disaster. Such an outcome could force the United States to pick among its

partners and would distract from US interests, such as containing Iran, counterterrorism, and Red Sea maritime security. These less-than-ideal outcomes would directly create opportunities for numerous US adversaries or competitors, including the Houthis, Iran, ISIS, Russia, and al Qaeda. Such challenges would distract from US efforts to compete with China and Russia elsewhere and secure US interests in the Western Hemisphere. Sudan is already the world's largest humanitarian crisis, and further escalation would cause a refugee crisis that would be felt in the Gulf and Europe and undermine the Trump administration's peacemaking agenda.

The following recommendations focus on easing regional tensions to create space to address the more local root causes of these conflicts. CTP will discuss recommendations to address these root causes in its subsequent reports on the specific conflict theaters.

Leverage the United States' Neutral Position

Seek to Mediate

The United States should use its neutral position to mediate conflicts in the region. The United States is uniquely positioned to mediate between the two sides, given its strong ties with countries on all sides. The Trump administration has designated the UAE a major defense partner and Saudi Arabia as a major non-NATO ally. Trump is an unabashed defender of Israel, is a fan of Sisi, and has worked to mend ties with Erdoğan. The United States has a base in Djibouti and a working relationship with Puntland, Somaliland, and the FGS to coordinate on counterterrorism issues.⁵⁸⁷ Trump administration officials have also engaged the actors on both sides in Sudan and contacted Abiy and Isaias more frequently to manage their feud.⁵⁸⁸

Shelve Somaliland Recognition

The United States should not recognize Somaliland amid the current regional standoff as it offers limited benefits to core US interests and would jeopardize its neutrality. Somaliland has a strong case for independence, which prominent US officials and figures associated with the Trump administration have

promoted.⁵⁸⁹ However, Saudi Arabia and other key partners aligned with it would view such a move as siding with Israel and the UAE.

US recognition would appear even more biased as it breaks with several major precedents from the cases of Eritrea and South Sudan, such as the AU being first to recognize the new countries and the federal governments agreeing to the independence of breakaway territories. US officials must weigh these costs against the questionable benefit Somaliland recognition would have for key US objectives, given that the United States already has a naval base in neighboring Djibouti and a strong partnership with Somaliland.⁵⁹⁰

Heighten Pressure on Destabilizing Actors

Compartmentalize and Apply Pressure

US officials must aggressively promote regional stability and apply pressure for inflammatory actions, including in Africa, if they want peace in the Middle East. Successive US administrations have not held their middle-power allies accountable for actions in the Horn of Africa in the name of preserving partnerships and stability in the Middle East. This approach fundamentally misunderstands that the Horn of Africa is an equally important part of the Red Sea theater and has unwittingly allowed tensions to fester in the region that are now dragging key Middle East partners toward conflict.

The United States should push back on the zero-sum outlook in the region and compartmentalize—an approach the Gulf monarchies use themselves when it suits them. The US partnerships with Israel and the UAE are more than strong enough to discuss shared visions for critical mineral investments in Africa, Middle East security, and more while still holding these partners accountable for fueling violence in Sudan or anywhere else.

US officials should heighten diplomatic pressure on all actors, but particularly the UAE, to cease activity detrimental to regional stability and levy sanctions against regional arms-trafficking networks. The UAE pressured the RSF to call off an assault in western Sudan in 2024 following a UN resolution demanding

a ceasefire, showing the UAE does respond occasionally to diplomatic pressure.⁵⁹¹

Sanction the RSF

The Trump administration should heed the call of congressional Republicans and sanction the RSF as a Foreign Terrorist Organization (FTO) or Specially Designated Global Terrorist (SDGT) organization. An FTO or SDGT designation would enable US officials to investigate and potentially prosecute any third parties providing material support to the RSF. Investigations can expose further misdealings and lead to direct sanctions on third parties, which further raises the risk for any third parties continuing to support the RSF.⁵⁹²

Promote Inclusive Solutions

Address Emirati Interests in Sudan

The United States should simultaneously push for inclusive solutions on divisive regional issues as part of a regional approach that rejects the current zero-sum outlook. US officials should first help address the UAE's concerns in Sudan, such as its investments and the SAF's Islamist ties, as part of ongoing Sudan peace talks. Egypt, Saudi Arabia, and the United States have already taken steps to contain Islamist influence in the SAF, which is a shared interest with the UAE.⁵⁹³

The United States can also try to negotiate a mutually beneficial deal with the UAE and SAF that would increase their willingness to cooperate with each other. Such a deal could involve SAF assurances to respect existing Emirati investments in the country, UAE promises to cut support for the RSF, and further UAE investments to help the future Sudanese government rebuild.⁵⁹⁴

Broker a GERD Compromise

The Trump administration should follow through on its intentions to reengage its Egyptian and Ethiopian counterparts to mediate a deal regarding the GERD and Nile River water usage. Ethiopia understandably wants full control over the GERD, but securing a deal that assures a minimum level of predictable downstream flow is key to addressing Egypt's concerns.

The time for talks is also ripe, given heightened fears among some Ethiopian leaders that their involvement in Sudan could serve as a pretext for an Egyptian or SAF attack on the GERD, which sits near the Sudanese border.⁵⁹⁵

US officials can help Egypt, Ethiopia, Sudan, and possibly other Nile Valley countries build on the existing 2015 declaration of principles to secure predictable water releases and create monitoring and dispute resolution mechanisms.⁵⁹⁶

Mediate Improved Ethiopian Sea Access

The United States should work to secure improved Ethiopian sea access, which would help minimize destabilizing Ethiopian activity and help secure Ethiopian concessions in GERD negotiations. Ethiopia is the most populous landlocked country in the world, and sea access is a widely supported domestic objective in Ethiopia and a legacy-defining challenge for Abiy. Djibouti has offered Ethiopia the opportunity to co-manage a commercial port in Tadjoura, and the FGS has offered Ethiopia commercial sea access via several ports in southern Somalia as part of the Ankara Declaration.⁵⁹⁷

US officials and their diplomatic and business partners can attempt to sweeten the deal by exploring additional investment options in Red Sea ports in Djibouti, Eritrea, and Somalia, supporting infrastructure projects to link these ports to Ethiopia's lucrative market, and negotiating preferential Ethiopian access to these outlets. However, commercial access alone will not fulfill Abiy's naval ambitions, which will require greater regional diplomatic effort to resolve.

Horn Inclusion in Abraham Accords Expansion

US officials should similarly mediate greater inclusivity in regional multilateral diplomatic initiatives. The Trump administration must keep the Horn of Africa in mind as it tries to expand the Abraham Accords. Securing Saudi participation remains key, but including Saudi Arabia's African allies—Djibouti and Somalia—would help bridge the gap between the two rival coalitions in the Red Sea.

Expand the Red Sea Council

The Trump administration should push to expand the Saudi-created Red Sea Council, which is currently unable to mediate regional tensions because it excludes Ethiopia, Israel, and the UAE. Israel has a Red Sea inlet, and Ethiopia and the UAE clearly have strategic stakes in the Red Sea, even if they do not have a Red Sea coast. The United States should seek to secure Emirati, Ethiopian, and Israeli observer status or membership to push the body away from being a one-sided coalition and toward a more impactful regional institution.

Engage Mediating Partners

The United States should engage other potential mediators in the region to amplify its efforts. The Trump administration's peace efforts in the eastern DRC form a template for mutually reinforcing peace tracks that involve African and international partners. The United States has led discussions between the Congolese and Rwandan governments, Qatar has led another track between the Congolese government and Rwandan-backed Congolese rebels, and the AU is leading a third platform that includes a broad array of actors across the DRC.

The United States will need to create a similar set of interlocking peace initiatives in the Red Sea at the international, regional, and domestic levels. Qatar is a possible partner since it has a comparatively small stake in the region and ties with several actors. Turkey should be a key mediator regarding Ethiopia, given Turkey's proven track record and position between Abiy and the rest of the Egyptian-Saudi axis. US officials should empower the AU to mediate internal domestic drivers of conflict, an area in which AU support has been crucial in previous US-backed peace agreements in Africa.⁵⁹⁸

Channel More Resources

Appoint an Envoy

The Trump administration should appoint and empower a Senate-confirmed envoy to the Horn of Africa, or at least Sudan, to support these various mediation efforts. Boulos has been key in spearheading

various business, health, and peace initiatives across Africa.⁵⁹⁹ His success demonstrates how impactful the United States can be when empowered officials get involved on the continent. But Boulos needs more support. He is one man covering an entire continent, including an ongoing peace process in the DRC.

Appointing a Horn envoy is essential to ensure that the region has the dedicated focus it needs, given the incredibly complex nature of these multilayered crises, which stretch across two continents and involve nearly a dozen different actors. Congressional approval and funding would be an even stronger statement of intent and empower an envoy to pursue US mediation and other cooperation efforts over the coming years.

Finance and Debt Relief Assistance

The United States should engage international partners and institutions to strengthen financing and debt

relief tools for African countries. African countries require capital as they develop their economies and support growing populations. Middle powers have become a leading source of money across Africa, especially in the Horn, where transactional partnerships have increasingly politicized regional development.

US officials should encourage more private US investment in the region, including joint projects alongside middle-power partners. The United States and other partners should also support greater debt relief via the International Monetary Fund and the World Bank to depoliticize African development and mitigate the influence of and need for Gulf “bailout diplomacy.”⁶⁰⁰ These tools could be particularly helpful regarding negotiation with Ethiopia, which is facing legal action after defaulting on debt payments to bondholders, partially due to a lack of support from China, France, and other bilateral lenders for Ethiopia’s latest debt restructuring effort.⁶⁰¹

V. Prospects for Peace

Pursuing the proactive measures described above will provide a solid foundation for a more peaceful and mutually beneficial Red Sea theater. The challenge is daunting. Resolving not only individual disputes but the multilayered regional crisis writ large will require years of sustained, high-level engagement with a wide array of partners.

The cost of failure is too high to continue to ignore these issues. The Red Sea cannot become a warzone between US allies and a vacuum to benefit Iran, Russia, and terrorists.

Such an outcome would come at the cost of an untold number of African lives and jeopardize US Middle East and Red Sea interests as the United States is trying to compete with China and Russia and secure American interests in the Western Hemisphere. It has never been clearer that if the United States wants peace in the Middle East, it will need to work toward peace in the Horn of Africa.

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The Critical Threats Project at the American Enterprise Institute equips policymakers, opinion leaders, and the military and intelligence communities with detailed and objective open-source analysis of America's current and emerging national security challenges. Through daily monitoring, in-depth studies, graphic presentations, private briefings, and public events, the project is a unique resource for those who need to fully understand the nuance and scale of the threats to America's security to effectively develop and execute policy. Follow the Critical Threats Project on X @criticalthreats.

Notes

The American Enterprise Institute sometimes cites sources from foreign domains. All such links are identified with an asterisk () for the reader's awareness.*

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