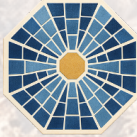




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The Red Sea: Divided by Water, United by Opportunities

Pathways from Competition to Cooperation

2026

The Red Sea:

Divided by Water, United by Opportunities

Pathways from Competition to Cooperation

Edited by

D.Ghanem, M.T.Maru, L.Narbone, C.Palleschi

2026

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Executive Summary

By *Dalia Ghanem*

Dalia Ghanem is a senior fellow and director of the Conflict and Security Program at the Middle East Council on Global Affairs. Her research focuses on Middle Eastern and North African politics, including issues of political violence, radicalization, civil-military relations, and gender studies. Previously, Ghanem served as director of the MENA Program and senior analyst at the European Union Institute for Security Studies (EUISS), an EU agency, where her research focused on the intricate interplay between the Middle East, North Africa, and the European Union. Prior to her tenure at EUISS, Ghanem was a senior resident scholar at the Carnegie Middle East Center in Beirut, where she worked extensively on Algeria's complex political, economic, and security landscape. Ghanem is the author of the cornerstone book of her research, *Understanding the Persistence of Competitive Authoritarianism in Algeria* (Palgrave Macmillan, 2022). She has contributed to numerous scholarly publications, including *How Border Peripheries Are Changing the Nature of Arab States* (Palgrave Macmillan, 2023) and *Russia Rising: Putin's Foreign Policy in the Middle East and North Africa* (I.B. Tauris, 2021). Ghanem's recent analysis has been featured in publications such as Chaillot Paper, where she explored Türkiye's global role, EU–North Africa relations, EU–Iraq relations, and China and India's growing presence in the Maghreb. Ghanem is a member of the Africa Board of the Global Initiative Against Transnational Organized Crime (GI-TOC).

Executive Summary

The Red Sea is back. But the old rules that governed this vital global waterway are gone, replaced by a volatile and crowded landscape of both old and new actors. The region's future is no longer being decided by the distant chess moves of great powers; it is being shaped, right now, by the assertive and competing interests of regional middle powers. Middle Eastern countries (MECs), such as the United Arab Emirates, Saudi Arabia, Türkiye, and Qatar are not waiting for permission. They are actively rewriting the security and political map of the Red Sea and the Horn of Africa (HoA) with a mix of money, diplomacy, and direct military and other forms of intervention. At the same time, the HoA is no longer a passive recipient of MECs' engagement. Its governments, elites, and local actors have learned to navigate and exploit MECs' ambitions, using external competition to bolster domestic legitimacy, attract investment, and diversify partnerships.

A New Approach: Breaking the Silos, Aligning Visions

To understand this critical corridor, we must discard the old, one-sided analytical lens. This book provides the first comprehensive analysis that breaks down the silos between MECs and the HoA. It argues that it is impossible to understand the region's trajectory by looking at one side of the water in isolation. By bringing perspectives from the Gulf into direct conversation with those from the Horn, this volume critically examines the interactions between the MECs and the HoA. It seeks to align visions and identify concrete steps toward realizing the vision of a Red Sea that, though divided by waters, is united by opportunities.

Core Drivers of the New Scramble

A New Geopolitical Game: The security boundaries have dissolved. Ideological and political fragmentation among MECs has turned the HoA into a proxy battleground, exploiting weak institutions for state-on-state competition. The collapse of states like Yemen and the war in Sudan are not isolated tragedies, rising tension between Ethiopia and Eritrea, their consequences, as seen in the Houthi attacks, and shifting alliances now pose a direct and tangible threat to global shipping and security.

Economics as Statecraft: This is not just about resources; it is about national survival. Water, food, and energy security form a strategic nexus that shapes policy on both shores of the Red Sea. From the GERD flashpoint to the Gulf's structural dependence on desalinated water and land, these pressures elevate resource security to a central national and foreign policy priority. Combined with climate change, they drive extensive investments within and into the Horn's transboundary basins, agricultural land, and energy corridors as governments seek to externalize or outsource production. Port investments are not merely commercial ventures but tools to control supply chains and project geopolitical clout. The strategic map is further complicated by Israel's latest recognition of Somaliland;

by exploring formal ties with Hargeisa, Israel seeks to secure its maritime flank against Houthi threats, effectively turning Somaliland into a pivotal node in the new Red Sea security architecture.

The Human Dimension: People are caught in the middle of this contest. The two sides of the Sea share the same migratory, religious, and cultural legacies. The Red Sea is the world's busiest, most dangerous, but least reported migration route. This has given rise to the "militarization of migration", where vulnerable people are exploited and forced to participate as combatants. Simultaneously, soft power, through schools and religious ideologies, is used as a tool to deepen influence and shape societies from the ground up.

This e-book, which offers forward-looking, actionable recommendations, is a sober look at a major shift in how power works. In this crowded and volatile sea, the next major conflict may be only a single miscalculation away.

Introduction

By *Dalia Ghanem*

The Red Sea is back. The old rules that governed this vital waterway are gone, replaced by a volatile and crowded landscape of new actors, each with their own agenda. The region's future is no longer being decided only by the distant chess moves of great powers. It is being shaped, right now, by the assertive and often competing interests of regional middle powers. Middle Eastern countries (MECs), such as Türkiye, the United Arab Emirates (UAE), Saudi Arabia, and Qatar are not waiting for permission. They are actively rewriting the security and political map of the Red Sea and the Horn of Africa (HoA) with a mix of money, diplomacy, and direct intervention. For global trade, energy flows, and international security, the stakes in this scramble are immense. The actors are not neutral. They are not simple proxies. They are active interested parties, and their actions, whether called mediation, investment, or security cooperation—are about influence, prestige, and hard national interests. This has turned the region into a theatre where the line between peacemaker and protagonist is dangerously blurred, and where local conflicts are easily internationalized.

At the same time, the HoA is an active participant, and no longer a passive recipient of MECs' engagement. Its governments, elites, and local actors have learned to navigate and exploit the ambitions of their Gulf and regional counterparts, using external competition to bolster domestic legitimacy, attract investment, and diversify alliances. This interplay has created a dynamic arena, where both regions shape—and are shaped by—each other's actions, ambitions, and constraints.

This eBook tackles that new reality, acknowledging that to understand this critical corridor, one must understand the motivations and contradictions of regional actors on both shores. Its distinctiveness—and, we believe, its most original contribution—lies in its deliberate effort to break down the usual analytical silos. For the first time, this volume brings perspectives from MECs into direct conversation with those from the HoA, arguing that it is impossible to understand the region's trajectory by looking at one side of the water in isolation. By reframing the Red Sea as a bidirectional arena, this approach seeks to foster mutual understanding, facilitate dialogue, and align agendas between the two shores, with the ultimate objective of contributing to mitigating risks and unlocking the opportunities that exist across the Red Sea.

To advance this goal, this eBook critically examines whether the MECs and the HoA perceive the opportunities and risks of the Red Sea in similar ways or whether their interests are fundamentally at odds. By prompting this reflection, the eBook identifies areas of convergence—where MECs and Horn states can align and collaborate effectively—and fault lines—where deep divergences persist, and interests collide. This approach offers policymakers practical guidance by providing a clearer understanding of how to capitalize on low-hanging fruits and design risk mitigation strategies to prevent escalating tensions that could overshadow future opportunities.

To map this new landscape, the eBook's analysis is built around three core drivers: the raw geopolitical rivalries, the foundational role of economics and resources, and the critical human dimension.

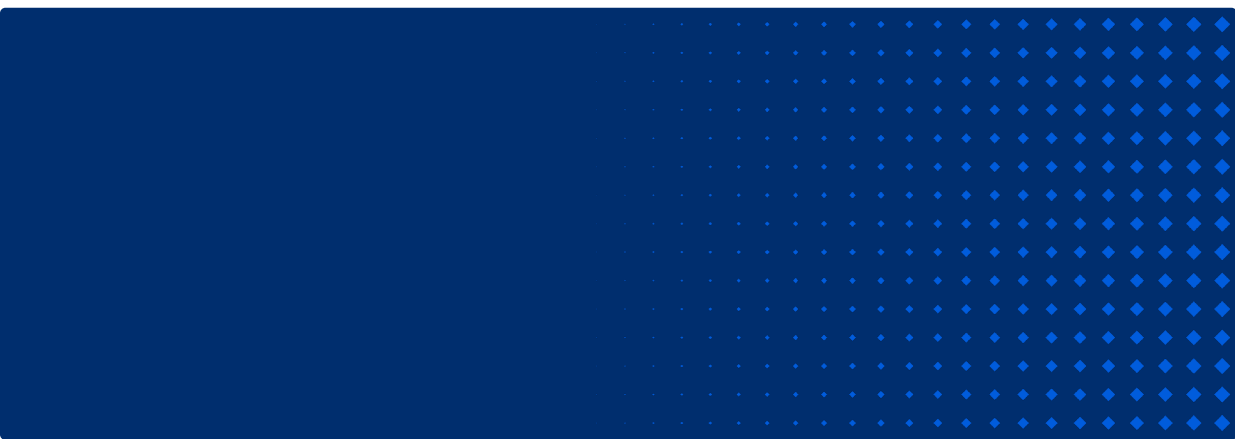
Mehari Taddele Maru opens the volume by setting the scene and advancing a foundational argument: maritime security and inland stability are inseparable. Sustainable order at sea depends on political stability, institutional legitimacy, and socioeconomic opportunities onshore. Building on this premise, the eBook then turns to the evolving geopolitical dynamics across the region. Federico Donelli argues that the security boundaries have effectively dissolved, creating a single “wider Red Sea region” for competition. Mahjoob Zweiri and Tasnim Mohamed Ali builds on this, showing how the ideological fragmentation among Gulf states—pitting the UAE against the Qatar/Türkiye axis—has turned the HoA into a proxy battleground, exploiting weak institutions for their own gain. Western and other powers are part of this complex web, but often without a clear plan. Cinzia Bianco, Gawdat Bahgat, and Katherine Holden reveal how US and EU strategies often boil down to a narrow focus on counterterrorism and maritime security, a reactive posture that leaves a strategic vacuum for others to fill. Imad Mansour and Meryem Merouane look at China's growing presence through its Belt and Road Initiative (BRI). They question Beijing's claims of neutrality, showing how its massive economic projects inevitably become entangled in the region's deep-seated rivalries. We then turn to the middle powers themselves. Kaan Devecioglu details Türkiye's “Blue Homeland” doctrine, a multi-dimensional strategy with Somalia as a key military and economic partner. Ahmed Morsy and Mostafa Mandour examine Egypt's defensive posture, driven by existential threats to its water security from the Grand Ethiopian Renaissance Dam (GERD) and the spiralling chaos in Sudan. Amaia Sánchez-Cacicedo outlines India's “Link and Act West” policy, viewing the Red Sea as a vital arena to secure its trade routes and counterbalance China. The consequences of state failure are laid bare by Nabil Al-Bukairi, whose analysis of Yemen shows how its collapse and the subsequent Houthi attacks now pose a direct, tangible threat to global shipping.

But this is not just about geopolitics. It is also about resources, trade, and investments. Luigi Narbone and Carlo Palleschi examine Gulf-Horn maritime exchanges, showing that beneath complementary economies lie persistent structural asymmetries. Mohamud Jama argues that water scarcity is now a primary driver of regional strategy, from the GERD flashpoint, which has brought Egypt and Ethiopia to the brink, to the Gulf's total reliance on energy-intensive desalination. That scarcity directly fuels economic statecraft. Nourah Shuaibi identifies food security as a core Gulf Cooperation Council (GCC) foreign policy goal, pushing massive investments into HoA farmlands in a strategic move to outsource their food production. Robert Mogielnicki details how Saudi Arabia's Vision 2030 projects like NEOM are creating new economic links, yet he also points out that real bilateral trade remains surprisingly weak, exposing a gap between ambition and reality. Asma Mohamed Ahmed looks at how port investments, like those by the UAE's DP World in Berbera, are not just commercial ventures but tools to control supply chains and project geopolitical clout.

Caught in the middle of all this are people. Leah Tesfamariam details the patterns of irregular migration through the Eastern corridor via Yemen—the world’s busiest and one of its most dangerous maritime migration routes but also underreported, a journey fuelled by poverty, war, and climate change. Faozi Al-Goidi introduces the grim concept of the “militarization of migration,” where vulnerable African migrants are systematically exploited and forcibly turned into combatants in conflicts like the war in Yemen, their bodies becoming another commodity in a brutal market. Rossella Marangio examines how soft power, through the construction of schools and the promotion of religious ideologies, is another tool used by Gulf countries and Türkiye to deepen their influence and shape societies from the ground up.

Finally, the book advances that neither Red Sea shore can succeed alone, proposing a development and security framework to transform competition into cooperation across both land and maritime domains.

This e-book is a sober look at a major shift in how power works. It details the opportunities and the real dangers of a world where the security of a vital waterway is no longer managed by great powers but is a contested field for a rising class of regional actors from both shores. In this crowded and volatile sea, the next major conflict may be only a single miscalculation away.



Setting the Scene: Why Maritime Security Begins on Land

By Mehari Taddele Maru

Professor Mehari Taddele is currently the Chair of Pan African Agenda Institute, Academic Coordinator of the Young African Leaders Programme (YALP) and Part-time Professor at the School of Transnational Governance, and Part-time Professor at the Migration Policy Centre, European University Institute, and Adjunct Professor at Johns Hopkins University, and Luiss University. Previously, he served as Lead Strategist for International Authority on Development (IGAD) Task Force on the Red Sea and the Gulf of Aden, Legal Expert and Programme Coordinator for Migration at the Office of the Legal Counsel of the African Union Commission (AUC). He also served as Chief Strategist, Lead Migration Expert and Legal Drafter for the IGAD and the AU High-level Advisory Group. Prof. Mehari Taddele is a graduate of Harvard and Oxford universities. He holds a PhD in Legal Sciences from J.L. Giessen University, Germany, an MPA from Harvard, an MSc from the University of Oxford, and an LLB from Addis Ababa University.

Setting the Scene: Why Maritime Security Begins on Land

Maritime security in the Red Sea is inseparable from the stability of littoral lands. Without land stability, maritime security is unthinkable. Troubles on the high seas originate on land, and inevitably return ashore. By linking terrestrial governance to maritime outcomes, the chapter reframes the Red Sea not as a frontier dividing continents, but as a mirror of the region's political economy of fragility and geopolitical rivalry.

Sea-land security interdependence in the Red Sea and HoA can be theorized through the intersection of geopolitical competition, international trade, the global and regional political economy of war, rentier dependency, and coastal livelihoods. The maritime and terrestrial spheres are mutually constitutive: global trade routes intersect with fragmented local economies, where coercive and extractive practices sustain conflict systems. Both Somali pirates and Yemeni Houthi operatives rely on inland patronage networks and geopolitically significant conflicts; ransom, smuggling, and illicit trade revenues circulate back to finance militias, corrupt bureaucracies, and parallel administrations.¹ It has been reported² an increasing al-Shabaab-Houthi cooperation through arms transfers, shared drone technologies, and coordinated piracy off Puntland, transforming the Bab-el-Mandeb into an integrated conflict complex. Each hijacking or missile strike thus reinforces the rentier logic of war economies, and deepens maritime-terrestrial interdependence.³

Beyond security, environmental degradation and economic inequality bind the two shores within a shared ecology of crisis. Illegal fishing, toxic waste dumping, and unregulated ship-breaking—all manifestations of weak environmental governance—generate local grievances and provide recruitment narratives for pirates and militants⁴. For HoA states, maritime security is existential but framed less by power projection than by the protection of livelihoods and economic access. Landlocked Ethiopia regards Red Sea access as an 'existential necessity' for sovereignty and regional stability.⁵ Somalia's anti-piracy strategy links maritime stability to restoring community fisheries and weakening al-Shabaab's revenue base, while Djibouti's rentier economy depends on port revenues that make maritime stability a national priority.⁶

1. Ursula Daxecker and Brandon Prins, *Pirate Lands: Governance and Maritime Piracy* (Oxford: Oxford University Press, 2021).

2. Africa Center for Strategic Studies, "Expanding al-Shabaab-Houthi Ties Escalate Security Threats to the Red Sea Region," ACSS Special Report, 2025.

3. Omar Mahmood, "The Roots of Somalia's Slow Piracy Resurgence," Institute for Security Studies, 2024, accessed November 2025,

4. George R. Trumbull IV, "On Piracy and the Afterlives of Failed States," Middle East Research and Information Project (MERIP), 2010; Africa Defense Forum, "Rough Waters: A Wave of Attacks Off the Horn of Africa Shuts Down Shipping," 16 October 2024; Curtis Bell, "Stable Seas: Somali Waters," Stable Seas Report (Broomfield, CO: One Earth Future Foundation, 2017).

5. Yordanos D., "Ethiopia's Quest for Red Sea Access: Existential Necessity Forging Regional Dividends," AllAfrica, 9 November 2025.

6. Africa Center for Strategic Studies, "Mapping Gulf State Actors' Expanding Engagements in East Africa," ACSS Spotlight Report (Washington, DC: National Defense University, 2025).

However, these states are constrained by a lack of capacity.⁷ Despite recognizing the strategic importance of maritime governance, most do not have sufficient capability to bring their maritime domains—including naval assets, surveillance systems, and enforcement mechanisms—under effective national control.⁸ Low state capability and rentier dependency reinforce reliance on external powers, Western coalitions, Gulf states, and China, whose interventions are often in pursuit of their own geo-economic and security interests.⁹ While international patrols reduced piracy incidents,¹⁰ they failed to address structural drivers such as state fragility, poverty, and resource predation, allowing cyclical resurgence once foreign deployments declined.¹¹

As maritime security scholars consistently observe, piracy and related threats invariably «begin on land»¹². Yet, current operations treat maritime threats as primarily naval problems, requiring maritime solutions. This chapter challenges that assumption, arguing that land stability constitutes the foundational prerequisite for sustainable maritime security.

The Red Sea in Context: in numbers, figures and graphs

The Red Sea measures approximately 2,300 kilometers in length and is bordered by eight coastal states. At its narrowest point, the Bab-el-Mandeb Strait is only 35 kilometers wide.¹³ Together, the Red Sea and Gulf of Aden form one of the world's most strategic maritime corridors, accounting for nearly 22-30 percent of global maritime-traded goods between non-neighboring states.¹⁴ Disruption at the Bab-el-Mandeb or Suez Canal reverberates through global trade systems.¹⁵ Alternative routes around the Cape of Good Hope extend journeys by up to two weeks, adding nearly 3,500-6,000 nautical miles and an estimated USD2.1 million in additional fuel and transit costs per vessel.¹⁶ What is more, in 2024, a total of 576 containers were lost at sea, a figure influenced by ongoing disruptions in the Red Sea region that forced a significant rerouting of global trade.¹⁷

7. Justin V. Hastings, "Geographies of State Failure and Sophistication in Maritime Piracy Hijackings," *Political Geography* 28, no. 4 (2009): 213–223.

8. George R. Trumbull IV, "On Piracy and the Afterlives of Failed States," *Middle East Research and Information Project (MERIP)*, September 2010.

9. Mehari Taddele Maru, "Beyond the 'Race to the Bottom': Africa on the Global Chessboard and the Call for Renewed Pan-African Agency," *UNU-CRIS*, 2023.

10. Samuel Oyewole, "Too Early to Celebrate! The Decline of Somali Piracy off the East Coast of Africa," *Strategic Analysis* 41, no. 6 (2017): 612–624.

11. Center for Preventive Action, "Conflict in Yemen and the Red Sea," *Council on Foreign Relations*, 26 March 2025.

12. Christian Bueger, "Learning from Piracy: Future Challenges of Maritime Security Governance," *Journal of the Indian Ocean Region* 11, no. 1 (2015): 63–83.

13. Congressional Research Service, *Red Sea Shipping Disruptions: Estimating Economic Effects*, CRS Report IF12657.

14. Lincoln F. Pratson, "Assessing Impacts to Maritime Shipping from Marine Chokepoint Closures," *Communications in Transportation Research* 3 (2023): 100083.

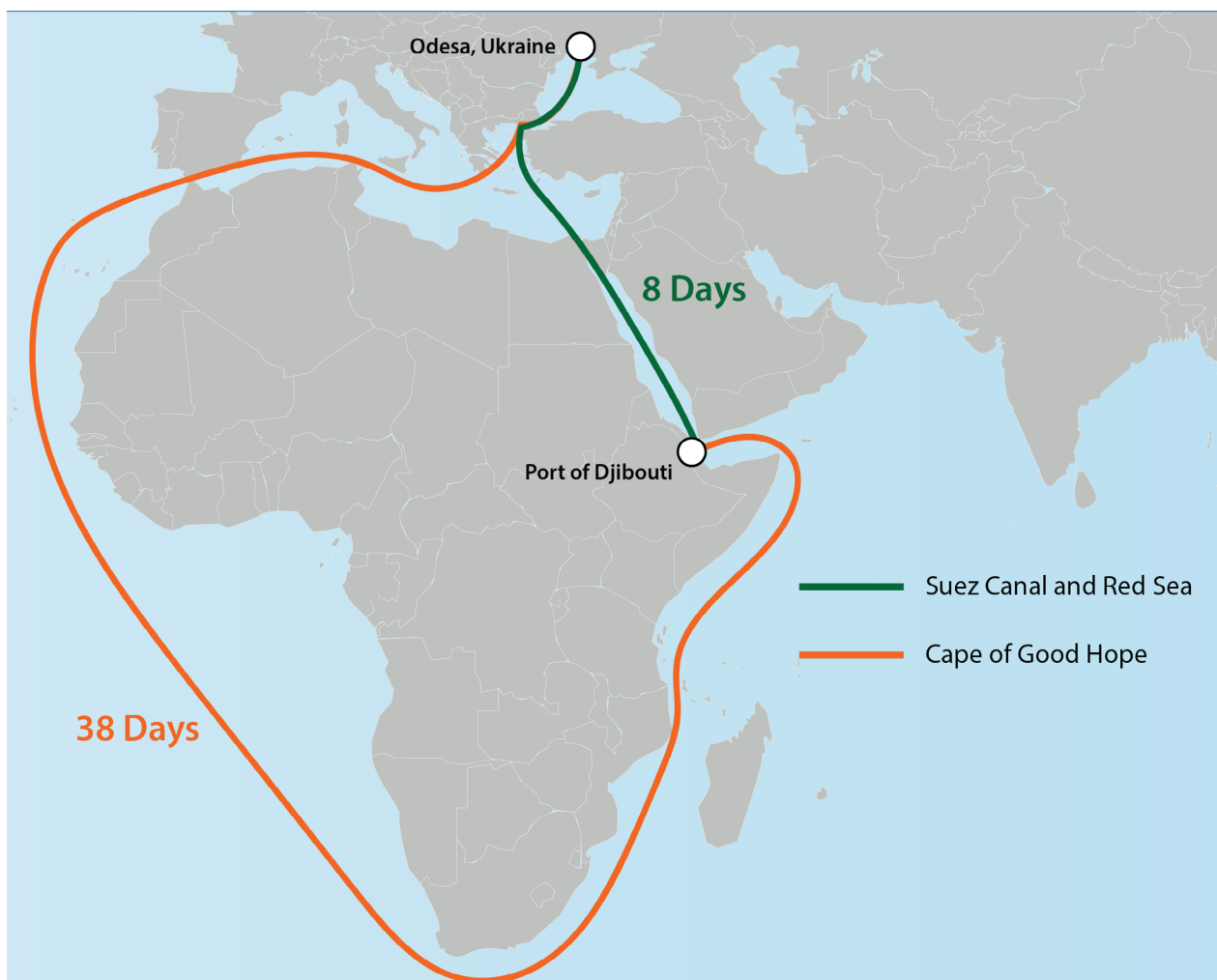
15. Katharina Buchholz, "Global Shipping's Chokepoints," *Statista*, 8 January 2024.

16. Anna Fleck, "Global Oil Shipments Depend on Major Chokepoints," *Statista*, 14 January 2025.

17. World Shipping Council, "World Shipping Council Releases Container Lost at Sea Report – 2025 Update," 18 June 2025.

The maritime security environment has deteriorated dramatically since November 2023, when Yemen-based Houthi forces began systematic attacks on commercial shipping in solidarity with Hamas during the Gaza conflict.¹⁸ By early 2025, Houthis had targeted over 100 commercial vessels, striking 48 and incapacitating six. These attacks forced a 50-60 percent reduction in Suez Canal traffic, with devastating economic consequences.¹⁹ Shipping costs jumped from USD1,660 per container in 2023 to nearly USD6,000 in 2024 – an increase of up to 500 percent. Egypt suffered monthly losses of USD800 million from reduced canal revenues, translating to a 70 percent drop.²⁰

Figure 1: Wheat shipment delays due to the Red Sea crisis



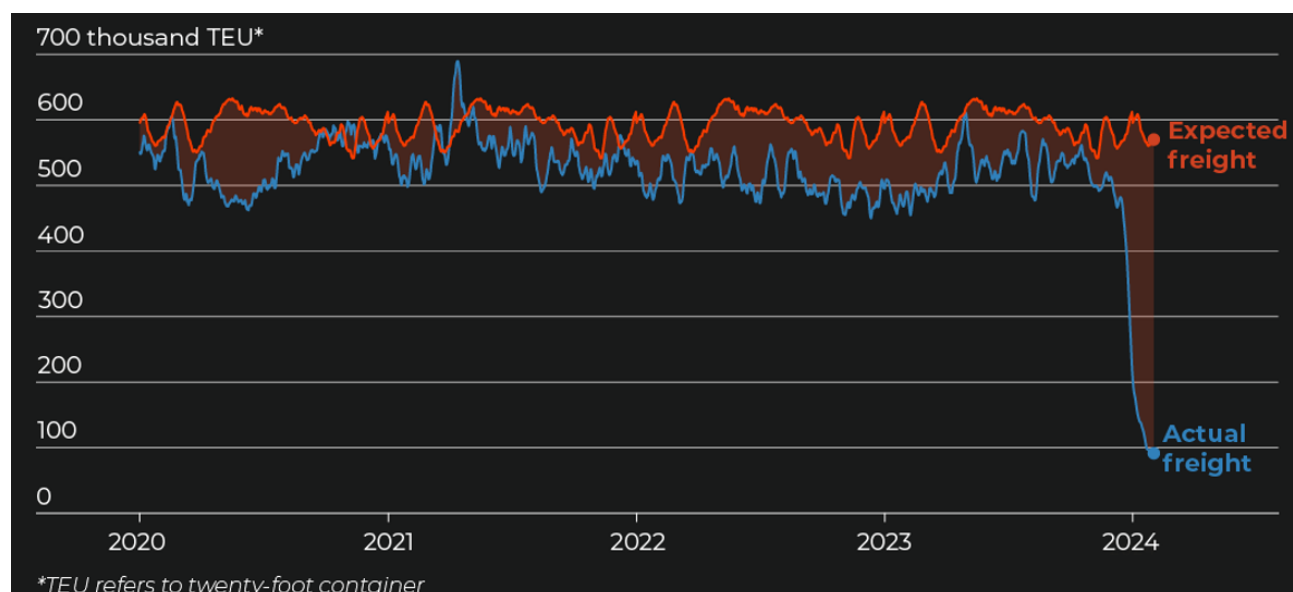
Source: African Center for Strategic Studies

18. Center for Preventive Action, “Conflict in Yemen and the Red Sea,” Council on Foreign Relations, 26 March 2025.

19. Andres B. Schwarzenberg, Red Sea Shipping Disruptions: Estimating Economic Effects, CRS In Focus IF12657 (Washington, DC: Congressional Research Service, 5 August 2024).

20. Africa Center for Strategic Studies, “Expanding al-Shabaab–Houthi Ties Escalate Security Threats to the Red Sea Region,” ACSS Spotlight Report.

Figure 2: Freight container volumes via the Red Sea



Source: Statista 2024

Simultaneously, Somali piracy has resurged after years of dormancy, exploiting the diversion of international navies toward Houthi threats. Between 2017 and 2020, only five pirate attacks were recorded. However, as international navies were deployed to confront Houthi missile threats in 2023-25, Somali pirates hijacked over 30 vessels.²¹ The first quarter of 2024 alone saw 33 incidents – a dramatic escalation, marking a troubling return to patterns last seen during piracy's 2011 peak of 212 attacks.²² The December 2023 hijacking of MV Ruen marked the first successful merchant ship capture since 2017, while the April 2024 hijacking of MV Abdullah netted pirates USD5 million in ransom.²³

The convergence of Houthi attacks and resurgent Somali piracy has created an unprecedented maritime security crisis. Yet, this maritime lifeline underscores a profoundly terrestrial problem: absence of peace and security, low human development, and misgovernance of political transitions.

Peace, Development, and Governance in the Horn of Africa

Despite its extensive inland and maritime natural resources, the Horn of Africa faces complex, mutually reinforcing challenges across human development, peace and security, and governance. While the Human Development Index shows an overall improvement since the end of the Cold War, the Horn remains a low performer compared to other regions. The region has witnessed devastating civil wars. According to the Uppsala

21. Statista, "Impact on Red Sea Vessel-Shipped Crude Oil Exports Caused by the Israel-Hamas Conflict from 7 October 2023 to 9 February 2024," Statista, 12 February 2024.

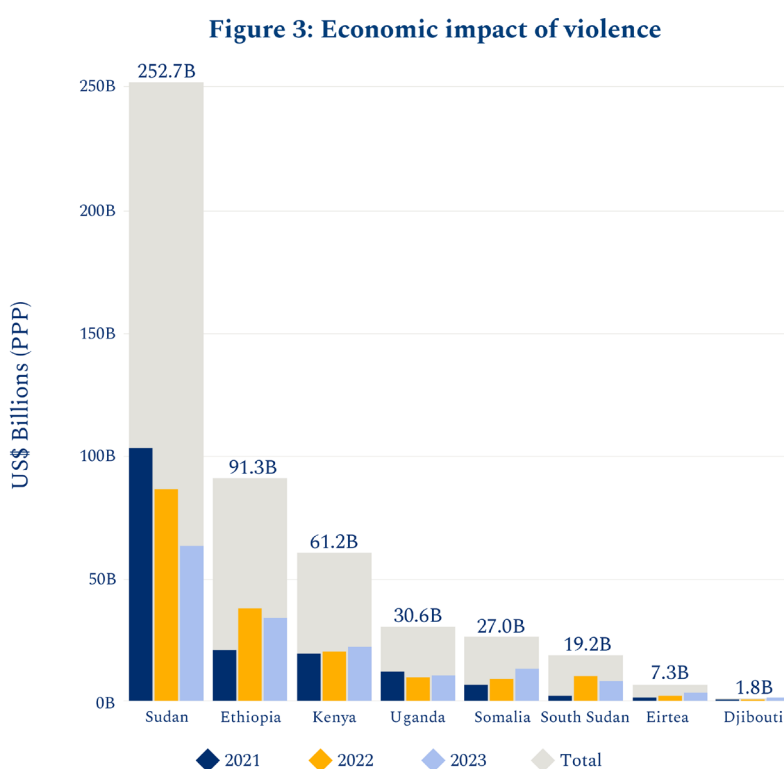
22. Statista, "Impact on Red Sea Vessel-Shipped Crude Oil Exports Caused by the Israel-Hamas Conflict from 7 October 2023 to 9 February 2024," Statista, 12 February 2024.

23. Kiel Institute for the World Economy, "Cargo Volume in the Red Sea Collapses," IfW Kiel, 11 January 2024.

University Conflict Data Program (UCDP), fatalities from organized violence increased by 97 percent in 2022 compared to 2021, from 120,000 to 237,000 – the highest death toll since the Rwandan genocide. Between 2020 and 2022, Africa experienced an estimated 378,000 deaths due to fighting, of which approximately 319,000 (61 percent) occurred in the Ethiopia-Eritrea war against Tigray forces.²⁴ Overall mortality, including indirect causes, exceeded 600,000, making it the deadliest conflict in the world in recent years.²⁵

In Sudan, fighting between the Sudanese Armed Forces (SAF) and Rapid Support Forces (RSF) erupted in April 2023. As of November 2025, estimates of death toll range from 150,000 – 400,000, with 26,000 civilians injured.²⁶ Another 25 million people – well over half of Sudan's population – are in desperate need of aid.²⁷ Sudan alone has over 15 million newly displaced, representing nearly one-third of its population.²⁸ As shown in the graph below, according to the GPI and Economics and Peace Institute, the economic impact of violence in Africa reached USD929 billion in 2023, between 2021 and 2023, with over half a trillion dollars of economic devastation incurred in the Horn of Africa alone.

Figure 3: Economic impact of violence²⁹



Source: Mehari Taddele Maru 2024, GPI

24. Uppsala Conflict Data Program, "UCDP Conflict Data," Uppsala University, 2022.

25. Financial Times, "War in Tigray May Have Killed 600,000 People, Peace Mediator Says," Financial Times, 21 January 2023.

26. Council on Foreign Relations, "Civil War in Sudan," CFR Global Conflict Tracker, 2025. Michael Froman, "The Forgotten War in Sudan," Council on Foreign Relations, 17 January 2025.

27. Mehari Taddele Maru, Sudan's Atrocious Political Transition: Resolving the Displacement and Humanitarian Crisis, UNU-CRIS Working Paper 23.10 (Bruges: United Nations University – CRIS, 2023).

28. UNHCR, UNHCR Refugee Data Finder, 2025, accessed October 2025.

29. Institute for Economics & Peace, Global Peace Index 2022: Measuring Peace in a Complex World, IEP Report (Sydney: Institute for Economics & Peace, June 2022).

The quality of national political and global governance remains the most significant single factor in ensuring peace, security, and human development.³⁰ The Horn is home to four of the ten worst-performing countries: Somalia, South Sudan, Eritrea, and Sudan. The region also hosts three of the 13 least-peaceful countries globally (South Sudan, Somalia, and Sudan), while Ethiopia and Eritrea rank relatively low on peace indices.

This governance crisis has eroded the primacy and effectiveness of the AU peace and security architecture. African high-profile crises now increasingly default to bilateral or extra-regional conveners, effectively sidelining AU mechanisms: Turkey mediating between Ethiopia and Somalia; Qatar and the United States between Democratic Republic of Congo and Rwanda; and Saudi Arabia and the United States dominating the Sudan peace process. The AU's longest-running mission in Somalia, deployed since 2007, now faces an existential crisis.

Four Determinants of the Land-sea Security Nexus in the Red Sea

The deterioration of regional and domestic governance, compounded by worsening economic conditions, has blurred security boundaries between maritime and terrestrial instability. From the African side of the Red Sea, four interrelated determinants shape this nexus: 1) geopolitical interests and great power competition; 2) sovereignty and transnational threats; 3) competition over transboundary natural resources; and 4) the Horn of Africa as a proxy battleground.

1. Geopolitical interests and great power competition

The Red Sea has re-emerged as a central arena for global and regional power rivalry. During the Cold War, the Red Sea became a theater for superpower competition, with coastal African states, particularly Ethiopia and Somalia, becoming pawns in global alignments. The post-9/11 era saw re-militarization through anti-piracy operations, while Gulf states such as Saudi Arabia, the UAE and Qatar deepened involvement through port acquisitions, military bases and investment. The current phase is characterized by polycentric competition, where global and regional powers—China, the United States, Russia, Turkey, Iran, Israel, and Gulf states—vie for influence.

Djibouti is the epitome of this strategic concentration, hosting military bases belonging to the United States, China, France, Japan, and Italy, thus making it the world's most militarized port city per capita. The early 2010s international naval campaigns such as Combined Task Force 151, NATO's Operation Ocean Shield, and the EU's Operation Atalanta – successfully curtailed Somali piracy which dropped from 212 attacks in 2011 to zero in 2020. Yet this naval success masked deeper governance failure: the land-based causes of piracy – weak institutions, poverty and lawlessness – remained unresolved. When international forces redeployed to counter Houthi attacks, piracy resurged, proving that naval dominance without political stabilization is only palliative, not curative.

30. UNDP, Human Development Reports: Country Insights, 2025, accessed October 2025.

Gulf states have emerged as dominant external players. The UAE's partnership with Ethiopia in developing Berbera Port (Somaliland) represents both economic enterprise and strategic declaration of reach. Turkey's extensive presence in Somalia, anchored by its 2017 military base and management of Mogadishu Port, merges economic engagement with security projection.

External actors—including Iran, the UAE, Turkey, Russia, and China—have shaped Red Sea geopolitics through arms, drone and information technological transfers, satellite intelligence, and infrastructure control. Iran has supplied Houthi forces with ballistic missile components and drone technology; Russia has provided intelligence and information; and China's Belt and Road investments in Djibouti now include a military base and control of vital internet infrastructure. Turkey's presence includes 'drone diplomacy' and military base. UAE's military support extends to states like Ethiopia and non-state parties in wars in Sudan. All these interventions have exacerbated these conflicts, increasing fatalities and undermining state integrity.

Figure 4: External projection in the Horn of Africa



Source: The North Africa Post 2024

2. Sovereignty, transnational threats, and maritime spillovers

Yemen's civil war has turned the Houthi movement into a maritime actor. Since 2023, Houthis have launched over 100 drone and missile attacks on ships in the Bab-el-Mandeb corridor, targeting vessels linked to the US and its allies. Collaboration between al-Shabaab and the Houthis exemplifies this symbiosis. In 2024, al-Shabaab operatives reportedly received training in Yemen in drone warfare, while Houthis provided weaponized UAVs used in Somalia and Puntland. The illicit 'protection fees' extracted by Houthis – estimated

at USD180 million per month – finance insurgencies and entrench weak governance across the region.³¹ These attacks have disrupted global supply chains, forcing shipping lines to reroute around the Cape of Good Hope; adding 6,000 nautical miles and increasing freight costs by 400 percent.³² This maritime insecurity feeds back into inland instability.

3. Competition for transboundary resources and border disputes

Competition for strategic natural resources terrestrial and maritime remains a core driver of instability. The Grand Ethiopian Renaissance Dam (GERD) exemplifies interdependence between water security and geopolitics. Egypt, reliant on the Nile for 95 percent of its freshwater, views GERD as an existential threat; Ethiopia regards it as a sovereign right and symbol of national modernization.

Unresolved border disputes between Ethiopia and Sudan in al-Fashaga; Kenya and Somalia over maritime boundaries; and Eritrea's ongoing tensions with Djibouti and Tigray further destabilize relations. The 100,000 km² Indian Ocean triangle dispute between Kenya and Somalia illustrates how discovery of potential oil and gas reserves can escalate into international legal battles. Declining fish stocks and widespread illegal, unreported and unregulated (IUU) fishing have eroded livelihoods and fueled local grievances and support for piracy.³³

4. The Horn of Africa as a proxy battleground

The war in the Horn has drawn in a complex web of regional and external sponsors. For instance, the conflict in Sudan brought Saudi Arabia, Egypt, Eritrea, Iran, and reportedly back SAF, while the UAE, Ethiopia, and Russia elements have ties to RSF. Such alignments illustrate how external rivalries amplify internal wars rather than resolve them.

Israel's 2025 recognition of Somaliland, potentially making it the second African signatory to the Abraham Accords after Morocco, has accelerated the crystallization of two competing geopolitical blocs with profound implications for Red Sea maritime security and regional stability. These developments unfold against escalating Saudi-UAE tensions in southern Yemen and competition over the strategically vital Port of Aden, compounding an already volatile regional security environment.

Two Competing Blocs

The first bloc, expanding around the Abraham Accords framework, includes Israel, UAE, Ethiopia, RSF-Sudan, and Haftar's Benghazi government (Libya). These actors share state-interest calculations prioritizing port access, maritime security cooperation, and counterbalancing traditional regional powers. The UAE serves as the linchpin, leveraging

31. Africa Center for Strategic Studies, "Expanding al-Shabaab-Houthi Ties Escalate Security Threats to the Red Sea Region," ACSS Spotlight Report, January 2025.

32. Katharina Buchholz, "Global Shipping's Chokepoints," Statista, 8 January 2024.

33. Mehari Taddele Maru, Mohamed Salih, and Martin Ndede, Transboundary Natural Resource Disputes in Africa: Policies, Institutions and Management Experiences, UNECA Report (Addis Ababa: United Nations Economic Commission for Africa, 2018).

investments in Berbera port (Somaliland), Bosaso (Puntland), and southern Yemeni ports to create an integrated maritime logistics network. Ethiopia's strategic imperative for Red Sea access—formalized through its January 2024 Memorandum of Understanding with Somaliland—aligns perfectly with bloc interests. Ethiopia's landlocked status magnifies regional tensions while Ethiopia-Eritrea border remains one of the Horn's most volatile flashpoints. The Ethiopian government views this as deliberate geopolitical injustice. The Ethiopia-Somaliland Memorandum of Understanding (2024)³⁴, granting Ethiopia potential port access in exchange for recognizing Somaliland, provoked strong opposition from Mogadishu, supported by Egypt and Eritrea. Addis Ababa's pursuit of sovereign port access, whether through Assab or Somaliland, has heightened fears in Eritrea and Somalia, raising the specter of renewed conflict. Eritrea claims that UAE is behind Ethiopia's claim for access to the sea.³⁵ In similar vein, the SAF in Port Sudan treats the RSF as an outfit of the UAE in its bid to control Sudan. Intra-Gulf competition also shapes Red Sea politics.

The second bloc—the Sovereignty and Territorial Integrity Coalition—comprises Somalia, Saudi Arabia, Turkey, Egypt, Eritrea, SAF-Sudan, Dbeibeh's GNU (Libya), Qatar, the Arab League, African Union, and United Nations. This coalition coalesces around territorial integrity principles and opposition to secessionism. Through the Southern Transitional Council (STC), the UAE effectively controls Aden port and has expanded influence across southern Yemen's oil-rich Hadramout and Shabwah governorates. Like Somaliland, the STC possesses capacity to declare independence, leveraging historical precedent: South Yemen existed independently (1967-1990) before reunifying with North Yemen. This mirrors Somaliland's trajectory—uniting with Somalia in 1960 after only five days of separate independence. The UAE has systematically built facilities across the Red Sea: Berbera port with major DP World expansion, Bosaso military shipment hub, Abd al-Kuri and Samhah islands (Socotra archipelago), Aden port via STC control, and Assab port (Eritrea).

Despite nominal alliance in Yemen's conflict, Saudi Arabia and UAE have emerged as competitors. Saudi Arabia counters UAE expansion through supporting Hadi's government, creating «Nation's Shield» forces specifically to counter UAE-backed southern forces, backing SAF in Sudan against UAE-supported RSF, and developing alternative ports. Notably, UAE is not necessarily hostile to the Houthis—who battle Saudi Arabia—recognizing that Houthi control of northern Yemen constrains Saudi influence. Hadramout and Al-Mahrah governorates have become primary stages for this proxy competition, directly undermining maritime security through fragmented governance that enables smuggling networks, piracy, and illicit trade.

Saudi Arabia spearheaded the 2020 Council of Arab and African Coastal States of the Red Sea and Gulf of Aden, where membership debates reflect broader contests of inclusion and exclusion. Egypt, Eritrea, and Sudan oppose participation of Ethiopia and the UAE, underscoring how alliances over port management and maritime commercialization have become proxies for influence and legitimacy.

34. Mehari Taddele Maru, "Unveiling Ethiopia-Somaliland MoU and Its Implications," *Addis Standard*, 3 January 2024.

35. Jeberti, "Eritrea, Afwerki: 'The Emirates Are Behind Ethiopia's Claims for Access to the Red Sea,'" 23 July 2025.

These developments accelerate the emerging Red Sea cold war without triggering effective preventive mechanisms. Regional organizations remain divided along bloc lines, unable to mediate disputes. The UN lacks leverage to broker compromises on contested sovereignty. External powers (U.S., China, Russia, EU) pursue competing interests rather than coordinating stabilization. The wait-and-see scenario now reflects not strategic patience but rather the absence of viable de-escalation pathways. As diplomatic fragmentation deepens and proxy conflicts intensify, the Red Sea risks becoming a protracted instability zone, a cold war that could readily turn hot.

From Continuum of Instability to Interdependency

The Horn of Africa and Red Sea region exemplify a continuum of insecurity, where instability on land and at sea are mutually reinforcing. Maritime security mirrors this land-based instability. Somali piracy thrives on coastal poverty, corruption, and weak law enforcement. Houthi strikes emanate from rebel-held western Yemen, where governance collapse meets geopolitical patronage. Both threats originate from poorly governed land spaces. Declining in governance, peace, and human development across the HoA directly affect shipping security, investment confidence, and sovereignty in coastal states. Despite possessing more than 15 port sites, port systems and infrastructure along the Horn of Africa are severely dilapidated. Assab and Massawa in Eritrea, Port Sudan, and key Somali ports, including Mogadishu, Kismayo, Bosaso, Berbera, and smaller facilities such as Barawe, are operating at minimal functional levels due to protracted conflict, political and economic fragmentation, and limited state capacity. This degradation undermines regional integration, trade, investment, and humanitarian access, while increasingly transforming these ports into theaters of maritime insecurity. Poorly governed ports become hubs of war economies, facilitating illegal exports of livestock, gold, and agricultural products. A key example is the «blood gold» rush from Sudan and Ethiopia to the UAE and other Middle Eastern countries. With instability on land and limited state capacity to govern maritime areas, irregular migration, smuggling, and human trafficking flourish. War economies breed rampant corruption, disruptions at sea leads to revenue loss, rising shipping costs and environmental damage which further weakens state capacity, creating a reinforcing cycle of decline.

The Red Sea no longer buffers regional conflicts but amplifies them, serving as an arena for competitive interventions by African, Gulf and global powers amid wars in Yemen, Ethiopia, Eritrea, Somalia and Sudan. Non-state actors mainly private military companies, logistics corporations and transnational investors, now shape the political economy of ports, information cables, and trade corridors, complicating state authority and accountability. The proliferation of foreign bases and private security actors entrenches dependency and geopolitical fragmentation, while multilateral paralysis among regional and global institutions underscores a governance vacuum; in essence, what analysts term a 'race to the bottom', where short-term strategic advantage eclipses collective stability and sustainable peace.

Naval patrols, maritime surveillance and interdiction operations are necessary, but insufficient. Only integrated governance can convert vulnerable borderlands from crime-enabling peripheries into resilient frontiers of sustainable order.

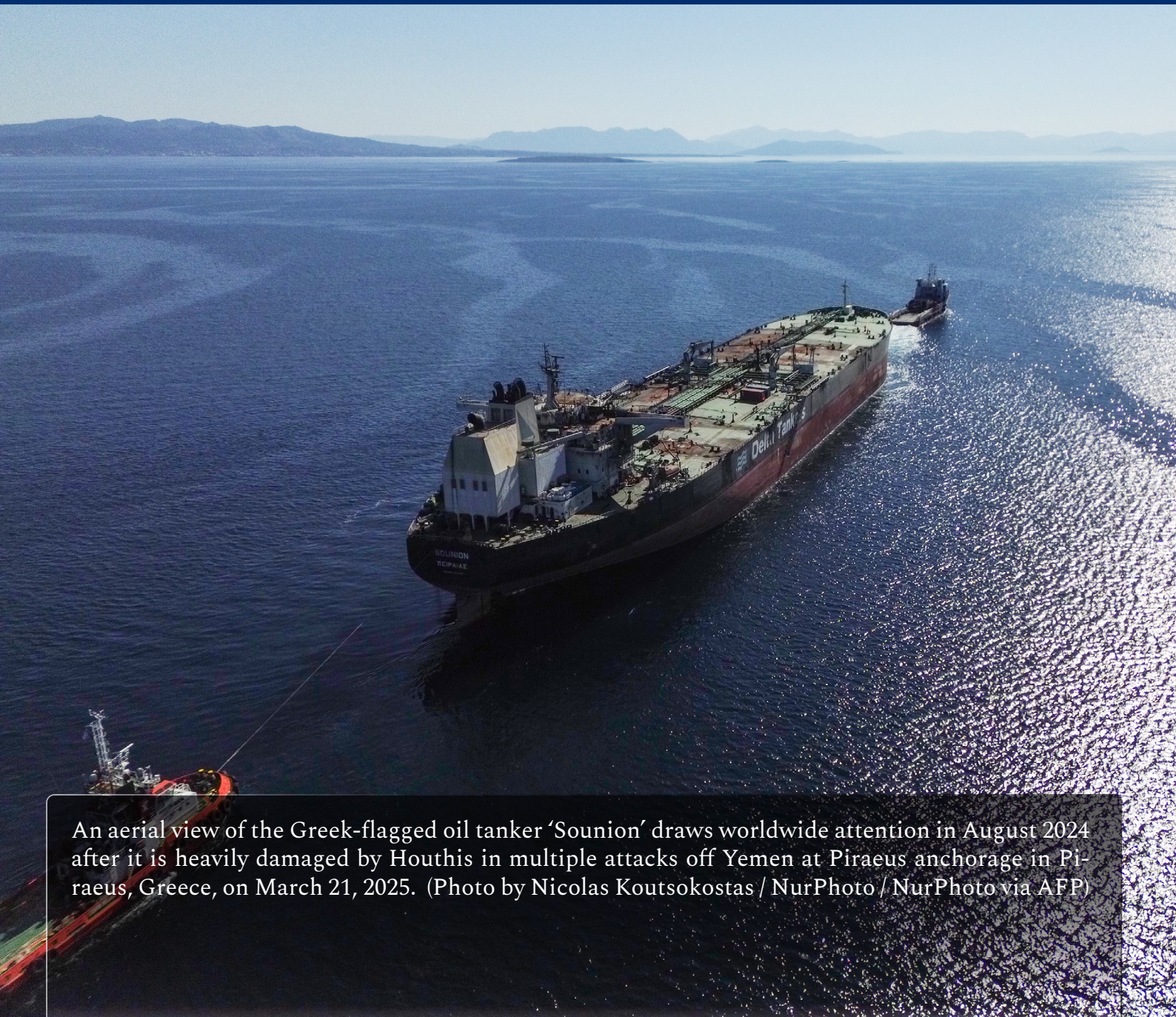
From Corridor of Crisis to Corridor of Cooperation

Despite evident challenges, this chapter advances application of an «opportunity lens» to demonstrate how the Red Sea can be transformed from a corridor of crisis into one of cooperation and shared development. Neither shore can succeed in isolation, nor will the sea be at peace without the land being at peace. To achieve this, there is a need to establish a red sea development and security framework that transform competition into cooperation through mutually reinforcing land-sea security measures.

Key concrete actions include the establishment of an inclusive «Big Tent» maritime stability forum under IGAD, the AU, the UN, the GCC, and Arab League auspice that aims to envision commonly shared maritime domain governance focused on building Red Sea free trade corridors and Blue Economy development zone aligned investments with development priorities of all states. A Red Sea Development and Security Framework needs to be established on a solid international law foundation while reinforcing existing normative and collaborative frameworks, including the Djibouti Code of Conduct and its Jeddah Amendment for piracy suppression, as well as the AU Integrated Maritime Strategy. This approach ensures legal coherence while building on proven cooperative mechanisms. By anchoring maritime security within a broader vision of regional integration and common development, the Red Sea can be transformed from a zone of competition into a corridor of shared peace and development.

Section 1

Geopolitics, Peace and Security



An aerial view of the Greek-flagged oil tanker 'Sounion' draws worldwide attention in August 2024 after it is heavily damaged by Houthis in multiple attacks off Yemen at Piraeus anchorage in Piraeus, Greece, on March 21, 2025. (Photo by Nicolas Koutsokostas / NurPhoto / NurPhoto via AFP)

Chapter 1

Geopolitical Shifts in the Wider Red Sea Region

By Federico Donelli

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Geopolitical Shifts in the Wider Red Sea Region

The political and security boundaries between the two sides of the Red Sea have become increasingly blurred over the past two decades. Historically, there have always been frequent and ongoing relations between the African and Middle Eastern coasts, especially in terms of commercial, cultural and religious interactions. However, institutionalised political and security interactions have been limited.³⁶ A significant change began at the turn of the millennium, characterised by a steady increase in economic and diplomatic interactions between countries on both sides of the Red Sea. This trend accelerated dramatically since 2008, when the reduction in the US's regional presence triggered a number of political and economic developments. These included the interplay of dynamics in the Middle East and the HoA. Increasing interactions between the two shores of the Red Sea were driven by multiple factors including the growing strategic importance of the Bab-el-Mandeb Strait for global trade and energy flows, the international response to piracy off the Somali coast, and renewed interest from Gulf states—particularly the Kingdom of Saudi Arabia (KSA), the United Arab Emirates (UAE) and Qatar—in projecting influence across the HoA through investment, mediation and a military presence. This chapter analyses the key factors that have intertwined the political and security affairs of the HoA and the Middle East, identifying the main drivers and potential consequences. The chapter's main argument is that the two regional complexes are deeply interconnected, and their futures are intertwined. Consequently, viewing the two regions as distinct and separate entities is becoming increasingly challenging. It may therefore be more helpful to consider the area as part of a wider Red Sea region.

Structural Change and Emerging Actors

Structural factors at both the global and regional levels have brought about change. Following the 2008 financial crisis, the transformation of the global environment has created new opportunities and challenges for emerging and non-traditional actors. Among these, many status-seeking Middle Eastern actors such as KSA, Türkiye, Qatar, and the UAE have played an active role in the HoA by increasing their economic and political engagement.³⁷ At the same time, the macro-regional context of the Red Sea was profoundly altered by the Arab uprisings, which produced a new regional landscape marked by heightened rivalries. The major regional players — KSA, Türkiye, the UAE and Iran — have embarked on a competition to reshape the regional order according to their preferences. Moreover, the independence of South Sudan, the internal political changes in Ethiopia following Zenawi's death, the beginning of Somalia's state-building process and Djibouti establishing its geostrategic importance all contributed to disrupting and redesigning the HoA balance of power.³⁸

36. Roberto Aliboni, "The Red Sea Region: Local Actors and the Superpowers" (London: Croom Helm, 1985).

37. Zach Vertin, "Red Sea Rivalries: The Gulf States and the HoA", Policy Briefing (Doha: Brookings Doha Center, 2019); Brendon J. Cannon and Federico Donelli, "Asymmetric Alliances and High Polarity: Gulf-Horn Relations in the Red Sea Arena," *International Affairs* 96, no. 6 (2020): 1649–1665; Luigi Narbone and Geert Widdershoven, "The Red Sea: Old Threats and New Strategies", Research Project Report (Florence: European University Institute, Middle East Directions, Wartime and Post-Conflict in Syria, 2021).

38. Alex de Waal, "The Real Politics of the HoA: Money, War and the Business of Power" (Cambridge: Polity Press, 2015).

In this context, leaders and policymakers' perceptions of the Middle East region have changed. The conceptualisation of the region, originally confined to the Gulf and the Levant, has progressively undergone a westward reconfiguration, extending to encompass the Red Sea and its adjacent littoral areas.

This led to a rapid process in which regional dynamics began overlapping with local ones. This process was also accompanied by a redefinition of the Middle East region. The concept of a 'Greater Middle East' emerged alongside other definitions, such as the 'Red Sea region' and 'Afrabia', which recall historical traditions. In political and security terms, the HoA has become an extension of the Middle East. In a period marked by intense rivalry, the countries on the African coast of the Red Sea became another arena of competition.³⁹ However, the regional context of the HoA was also affected by structural changes.

These pressures from both sides of the Red Sea contributed to the growing link between the political events on either side. All of the actors involved were pursuing their own political agendas. Even African countries, which are often perceived as passive, have tried to exploit the situation for their own benefit by securing financial and political support.

The Middle East's Deepening Footprint in the HoA

The war in Yemen epitomizes the interconnectedness of the two shores, drawing Middle Eastern powers into the epitomizes and sending Horn troops to Yemen, thereby reinforcing cross-regional security ties. As the Houthis expanded their control, Saudi Arabia, joined by the UAE, led a coalition against what they perceived as an existential, Iran-backed threat. This intervention made it imperative to cut off supply networks to the Houthis,⁴⁰ many of which ran through the African shore of the Red Sea, particularly Eritrea and Sudan, two of Iran's long-standing allies.

These two African countries had indeed developed closer ties with Tehran over the previous decade, driven more by pragmatism than ideology. Labelled rogue states during the US War on Terror and facing significant international isolation, both countries strengthened their ties with Iran as a counterweight to marginalization. Yet, these relationships were built on weak foundations.⁴¹ The fragility of these ties became evident as both regimes soon recalibrated their foreign policy. Convinced that stronger relations with the Gulf monarchies would have yielded greater diplomatic recognition and economic investment, Eritrea and Sudan shifted away from Tehran toward the Gulf monarchies. Consequently, Eritrea and Sudan eventually severed their ties with Iran and began supporting operations in Yemen in the face of the persuasive influence of KSA and the UAE. A key factor in understanding subsequent developments was Sudan's decision, under the leadership of Omar al-Bashir, to join the Saudi-led military coalition by deploying 10,000 soldiers, including both regular army (the SAF) and a paramilitary group (the RSF), respectively operating in Yemen under the Saudi and Emirati command. This enabled the leaders of both SAF and RSF, al-Burhan and Hemedti, to establish a trusting and loyal relationship with both KSA and UAE.

39. Federico Donelli, "Power Competition in the Red Sea: The Role of Middle Powers in a Changing Security Architecture" (London: Bloomsbury Academic, 2025).

40. May Darwich, "The Saudi Intervention in Yemen: Struggling for Status", *Insight Turkey* 20, no. 2 (2018): 125–141

41. Jeffrey A. Lefebvre, "Iran in the HoA: Outflanking the United States by Going South", *Middle East Policy* 19, no. 2 (2012): 117–133.

However, the internal conflicts within the GCC have had an even greater impact. Tensions between Sunni countries escalated in June 2017 when the UAE, KSA and Bahrain imposed an embargo on Qatar, which in turn could rely on support from Türkiye. This dispute reverberated across the Horn, as Abu Dhabi and Riyadh pressured African coastal countries to sever diplomatic relations with Doha. While some countries, such as Eritrea and Djibouti, accepted it, others, such as Somalia, opposed it due to their close ties with Qatar. Some countries, such as Ethiopia and Sudan, chose to strike a balance in order to capitalise on their position as much as possible.

As a result of Somali president Farmajo refusing to scale back relations with Doha, the UAE broke with Somalia's central government and began supporting the de-facto state Somaliland, where it formalized its backing by investing in the port of Berbera through a concession agreement signed by the Emirati company DP World. At the same time, the UAE also started building closer ties with Puntland, revitalising Somaliland's independence movement and increasing Puntland's political power. Following the rupture of relations between Sudan, Eritrea and Iran, Somalia's internal dynamics further demonstrated the influence of Middle Eastern politics on the HoA. Türkiye, by contrast, strengthened its alliance with Mogadishu through military training, infrastructure projects, and humanitarian aid, positioning itself as Somalia's principal external supporter.

Further confirmation came in 2018 when KSA and the UAE launched a joint initiative to facilitate dialogue between the Ethiopian Prime Minister, Abiy Ahmed, and the Eritrean President, Isaias Afwerki - a move driven by their ambition to expand political influence in the HoA, secure Red Sea maritime routes, and counterbalance Iran and Türkiye's regional role. The détente between Addis Ababa and Asmara, confirmed by a conference in Jeddah in September 2018, was considered to be the beginning of a new era in macro-regional politics. However, this prospect was quickly ruled out due to developments in Tigray and in Sudan. The temporary strategic alliance between Abiy and Isaias paved the way for two years of war against the Tigrayan authorities, one of the most violent and bloody conflicts in recent decades. By leveraging the détente to secure Eritrean support, Abiy was able to open a northern front against the Tigray People's Liberation Front (TPLF), effectively isolating the TPLF and consolidating the federal government's military position. Meanwhile in Sudan, the Omar al-Bashir regime was struggling with a severe financial crisis.

Sudan is another good example of how the internal split between the monarchies reverberated into the Horn. Confronted with widespread protests, the Sudanese president al-Bashir attempted to exploit his strategy of balancing between rival Middle Eastern players to secure backing from each side and shore up his regime. Driven by growing domestic instability, he pursued a swift rapprochement with Qatar and Türkiye, which culminated in the handover of the port of Suakin to Ankara and in turn triggered a reaction from the UAE and KSA. Abu Dhabi and Riyadh, along with their strong ally Egypt, used the ties they had forged during the conflict in Yemen to persuade the Sudanese security forces — the SAF and the RSF — to abandon al-Bashir and begin the transition process.⁴²

42. Jean-Loup Gallopin, "The Great Game of the UAE and Saudi Arabia in the HoA", POMEPS, 30 October 2020.

Shifting Alignments and Gulf Rivalries in the Post-2020

In 2020-21, rivalries were temporarily set aside in favour of a broader détente. Countries that had previously pursued opposing policies —Qatar and Türkiye on one side, Saudi Arabia and the UAE on the other— quickly began to reconcile their differences in response to crises in regions such as Somalia and Sudan. This marked the beginning of a transitional phase, characterised by the search for new balances and alignments in the region, which once again confirms the deep interconnection between political events on both shores of the Red Sea.

The conflict in Tigray exemplified this shift. When in 2021, the Tigray Defence Force (TDF) and its allies appeared to be gaining the upper hand, threatening the stability of the government of Ethiopian Prime Minister Abiy Ahmed, both the UAE and Türkiye decided to intervene in support of Addis Ababa by supplying ammunition and weaponry, including a limited number of Turkish Bayraktar TB2 drones. Deploying these drones alongside the Ethiopian National Defence Forces (ENDF) in late summer 2021 significantly shifted the balance of forces on the ground, forcing the TDF to retreat and leading to negotiations that culminated in the Pretoria Agreements in November 2022). The strategic alignment between the UAE and Türkiye played a significant role in shaping regional relationships, particularly those between Somalia, Eritrea and Ethiopia.

Mounting tensions in Khartoum revealed an ongoing internal power struggle within the Sudanese security apparatus, specifically between the SAF and the RSF. Against this backdrop, the involvement from the outset of Middle Eastern actors has been even more significant than in Tigray. Yet, while the war in Tigray was partly shaped by the 2021 détente and the ensuing realignment between Türkiye and the UAE, the Sudanese case follows a different logic: here, the rivalry between the SAF and the RSF has been directly fuelled by the competing agendas of the UAE and Saudi Arabia, two actors that had previously cooperated rather than been divided by the intra-Gulf rift.⁴³ The security forces' takeover in autumn 2022, involving both the RSF and SAF, marked the beginning of a period characterised by contrasting views between the two Gulf monarchies. Building on their alliances forged during the conflict in Yemen, Saudi Arabia and Egypt began supporting the SAF, led by General Abdel Fattah al-Burhan. In contrast, the UAE strengthened its ties with Mohamed Hamdan Daglo (Hemedti), the leader of the RSF, in a move reminiscent of Emirati earlier support for General Haftar in Libya.

As in Yemen, the main point of contention between the two Gulf monarchies in Sudan concerns the future structure of the country's leadership. In both scenarios (Yemen & Sudan), Riyadh opted for a calculated approach to integrating Islamist movements into the political landscape. In the case of Sudan, this involved the gradual incorporation of figures associated with the National Congress Party (NCP), led by former president Omar al-Bashir. In contrast, the UAE took a different stance. From their perspective, the rise of Islamist movements poses a significant threat to regional stability. The Emirati leadership is particularly concerned that empowering these movements could undermine their rule and security.⁴⁴

43. Noah Bassil and Xiangyu Zhang, "The Post-Bashir Era in Sudan: Uncertain Peace and Persistent Challenges", *Australian Journal of International Affairs* 75, 1-8.

44. Federico Donelli and Giuseppe Dentice, "Fluctuating Saudi and Emirati Alignment Behaviours in the HoA", *The International Spectator* 55, no. 1 (2020): 126-142.

As Sudan's internal rivalries deepened, tensions escalated into civil war in April 2023, further destabilizing the country and worsening the humanitarian crisis. While rooted in domestic factors, the conflict was intensified by the diplomatic, financial, and military backing that the SAF and RSF received from Gulf powers, which shaped its course and duration.⁴⁵

Entangled Futures: The Ethiopia–Somaliland Deal and the Deepening Red Sea Nexus

The growing interdependence between the HoA and the Middle East was highlighted once again by the signing of the MoU between Ethiopia and Somaliland. If implemented, the agreement would enable Ethiopia to increase its trade through the Port of Berbera, granting it a concession to establish a naval base in the Gulf of Aden. In exchange, Addis Ababa would formally recognize Somaliland's independence. Almost two years have passed since the agreement was announced, and it is now highly unlikely that it will be implemented by 2025 as originally outlined. Instead, it is expected that economic cooperation between Somaliland and Ethiopia will gradually increase along the Berbera corridor. For the time being, the issues of recognition and establishing a military base are likely to be sidelined. Nevertheless, the announcement has undoubtedly created divisions among regional and extra-regional players, regardless of how future events unfold. The UAE strongly supports the MoU, having invested significantly in the Berbera corridor over a long period of time. Conversely, some stakeholders view Ethiopia's decision as conflicting with the principles of sovereignty and non-interference, which could potentially destabilize Somalia. This perspective has gained substantial backing from a coalition including Egypt, Eritrea, Djibouti, KSA, Qatar and Türkiye. In response to Ethiopia's actions, Türkiye—which considers Somalia to be central to its investment and political strategy in Africa—has signed several defence agreements aimed at creating a deterrent. At the same time, Ankara is keen to maintain good relations with Ethiopia and does not wish to sever ties with the UAE after the 2021 détente. Consequently, Ankara has reiterated its position while striving to make progress with all parties through open dialogue

Meanwhile, KSA and the UAE have sought to strengthen coalitions in support of their respective positions. Saudi Arabia has formed alliances with Somalia that oppose Ethiopia, forming close ties with some of Addis Ababa's main rivals, including Egypt and Eritrea. Conversely, the UAE has exacerbated Somali fragmentation by supporting federal entities such as Puntland, while simultaneously consolidating its regional influence through closer ties with countries including Libya, Chad, Ethiopia, and Kenya. As tensions between Somalia and Ethiopia escalated in the following months, the risk of confrontation increased. However, Türkiye sought to ease these tensions by facilitating a rapprochement between Addis Ababa and Mogadishu. This initial effort culminated in the Ankara Agreement in December (2024). Despite this initial progress, the mediation process ultimately stalled by June (2025), as the parties were unable to find common ground.

45. Tekeste Ghebremeskel, "Conflict and Mediation in Sudan The prospect of peace", (2024) *Global Change, Peace & Security*. 35. 1-14.

Outlook and Conclusion

For over fifteen years, political events on both sides of the Red Sea have been closely interconnected, a trend that shows no sign of diminishing. This sustained intertwining has reshaped the regional landscape, with significant implications for the balance of power, patterns of external intervention and the behaviour of state and non-state actors. As shown, the increasing engagement of Middle Eastern powers in the HoA has led to the fragmentation of local political systems, creating fault lines, altering development trajectories and exacerbating the volatility of already unstable security environments. Nevertheless, new alignments have also emerged, creating opportunities for convergence in selected areas, such as port infrastructure, trade corridors, and counterterrorism initiatives.

Looking ahead, the Red Sea region is likely to remain an area of intensified political competition, but also of potential pragmatic cooperation. The longevity of this interconnectedness depends not only on the strategic interests of external actors, but also on how local elites manage and exploit these entanglements. Potential flashpoints, such as contested maritime spaces, proxy rivalries or resource-based tensions, may continue to fuel instability. However, there is also scope for more structured dialogue and inclusive regional frameworks that could mitigate conflict and promote cooperative governance. By acknowledging this interconnectedness, this publication on the Red Sea seeks to offer a fresh perspective — one that views the region not as a mere collection of separate states or subregions, but rather as an interconnected political arena shaped by transregional dynamics.

Chapter 2

Bridging or Breaking? Horn of Africa and Gulf State Ideological Divisions and the Security of the Red Sea

By Mahjoob Zweiri and Tasnim Mohamed Ali

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Bridging or Breaking? Horn of Africa and Gulf State Ideological Divisions and the Security of the Red Sea

The Red Sea functions as a critical artery connecting continents, economies, and civilizations. Extending from North Africa to the Arabian Peninsula, it serves as a crucial transit corridor linking Europe, Asia, and Africa through the Bab-el-Mandeb Strait and the Suez Canal. In 2022, approximately 14 percent of global trade was transmitted via this corridor, making it one of the most crucial channels for maritime trade worldwide, and accounting for nearly 30 percent of the world's seaborne container traffic.⁴⁶ The uninterrupted security of these waters is essential for energy supplies, consumer goods, and military equipment. The Red Sea is strategically bordered by a diverse array of states, including Israel, Egypt, Jordan, Yemen, Saudi Arabia, Sudan, Eritrea, Djibouti, and Somalia. These states present a distinct array of political systems, encompassing absolute monarchies and hereditary republics to nascent democracies, but alongside varying levels of internal cohesion. Some like Sudan and Somalia are plagued by ongoing civil conflicts and border disputes with neighbouring states. The GDP per capita discrepancy across the region adds further complexity: Saudi Arabia and Israel possess figures over USD30,000, while Somalia and Eritrea record just USD500 to USD800 annually.⁴⁷ On the other hand, the 2011 Arab uprisings, although initially focused on North Africa, set off a wave of political and ideological realignments extending well beyond the Arab world. In Egypt, the rise and fall of the Muslim Brotherhood (MB) exposed deep divisions among Gulf states over the future of political Islam. These rifts subsequently shaped how Gulf powers engaged with fragile states in the HoA. In countries like Somalia, Sudan, Eritrea and Djibouti, Gulf states began backing different factions based on their own regional visions. The result was a new layer of external competition in already fragile political systems, where local actors aligned themselves with Gulf patrons to gain leverage, resources, or legitimacy.

Against this backdrop, this chapter analyses intraregional relations arguing that ideological rivalries and the struggle for hegemony among the Gulf states, mainly the UAE, Saudi Arabia, and Qatar, have turned the HoA into a space of proxy competition, exploiting institutional fragility in countries such as Sudan, Somalia, Eritrea, Djibouti, and Egypt. The chapter begins by outlining the current trends shaping Gulf involvement in the Horn, then examines three main dimensions of this engagement: the UAE-Qatar/Turkey axis, the traditionalist bloc led by Saudi Arabia and Egypt, and the strategies of Horn states in navigating external pressures. It concludes with a reflection on the implications of these dynamics for regional security and the prospects for cooperative stability in the Red Sea arena.

Current Trends

Since the Arab uprisings, Gulf states, particularly the UAE, Qatar, and Saudi Arabia, have projected their rivalries into the HoA. These dynamics intensified after the Saudi- and Emirati-led war against Houthis in Yemen in 2015, which drew the Red Sea arena more directly into Gulf security concerns. Despite the scale of interest-driven Gulf interventions,

46. International Transport Forum, "The Red Sea Crisis: Impacts on Global Shipping and the Case for International Co-operation," Report (Paris: Organisation for Economic Co-operation and Development, 2024)

47. World Bank Group, "GDP per Capita (current US\$), Saudi Arabia," World Bank Data, accessed September 2025.

portraying the HoA merely as a passive stage for external power projection tells only part of the story. This perspective overlooks a complex and dynamic reality in which both regional and international actors interact with - and are influenced by - local political conditions of HoA countries.

Interventions by Middle Eastern Countries in the Horn of Africa

Type of Intervention	Example Country	Estimated Value / Impact
Military Basing	UAE in Eritrea, Turkey in Somalia	UAE base in Assab operational from 2015 till 2021; Turkish base in Mogadishu trains >10,000 Somali soldiers
Infrastructure Development	Qatar in Somalia (roads, hospitals, airports)	Qatar provided over USD200 million to Somalia in development aid from 2017 to end of 2021
Humanitarian Assistance	Saudi Arabia in Sudan (food, health aid)	Saudi Arabia provided USD100 million+ humanitarian aid to Sudan since 2021
Diplomatic Mediation	UAE & Saudi Arabia in Ethiopia-Eritrea (2018)	2018 Ethiopia-Eritrea peace process facilitated by UAE and Saudi Arabia
Lease of Military Ports/Bases	Djibouti, Sudan, Eritrea, Somalia, Puntland, Somaliland	Djibouti alone earns USD300 million/year from leasing to US, China, France, others
Counterterrorism & Security Cooperation	Ethiopia	Supported by the UAE through military training, intelligence sharing and financial assistance.

Source: Samira Gaid, *Gulf Soft Power in the Horn: Competition vs Cooperation*, Report (Pretoria: Institute for Security Studies, 2022).

This dynamic is evident in how foreign interventions in the HoA are often strategically instrumentalized by incumbent regimes to advance internal agendas. For instance, in countries like Ethiopia, external support from UAE for counterterrorism⁴⁸ has contributed to a slow but deliberate militarization of governance, with the objective⁴⁹ of repressing domestic dissent and attracting sustained flows of international security assistance. It has also enabled Ethiopia to project power externally, particularly through its sustained engagement in counterterrorism operations in Somalia.

The convergence between Gulf security interests and domestic regime survival thus creates a loop where development objectives are deprioritized in favour of regime consolidation. The prioritization of security over development has left governance across much of the HoA fragile, and this very fragility creates further openings for external influence from Gulf countries, which subsequently reinforces regimes' reliance on foreign support and deepens the cycle of securitized governance.

48. The UAE provided military training to Ethiopia's Republican Guard and has supplied around 30 armored personnel carriers to strengthen the country's internal security capabilities. See: The UAE as a Security Partner in Africa," Strategic Comments, December 2024, International Institute for Strategic Studies (IISS)

49. Jonathan Fisher and David M. Anderson, "Authoritarianism and the Securitization of Development in Africa," *International Affairs* 91, no. 1 (2015): 131-151.

Horn and Gulf Regional Actors: Diverging Strategic Visions and Common Ground

UAE vs. Qatar/Turkey Axis

The most visible rivalry shaping the HoA has been between the UAE and its partners on one side, and Qatar in close alignment with Turkey on the other. This divide reflects deeper ideological and strategic preferences that extend across the broader Middle East. On the UAE -Saudi side, political Islam is regarded as a destabilizing threat, with Abu Dhabi particularly focused on countering the influence of Islamist movements and consolidating authoritarian forms of governance. Conversely, Qatar and Turkey have invested in supporting governments and political actors with populist or Islamist leanings, especially in post-uprising contexts where central authorities were fragile and contested.

This cleavage has been especially pronounced in Somalia, which became a frontline for Gulf rivalries during and after the 2017 Gulf crisis. Mogadishu's federal government forged strong ties with Doha and Ankara, benefiting from infrastructure projects, financial assistance, and the Turkish military base that has trained thousands of Somali soldiers.⁵⁰ In contrast, semi-autonomous regions such as Puntland and Somaliland gravitated toward the UAE, which developed port facilities, provided security training, and entered into commercial partnerships that bypassed the federal government. This divergence not only deepened Somalia's internal fragmentation but also mirrored the broader ideological struggle: Qatar and Turkey engaging state institutions in Mogadishu, while the UAE cultivated relations with subnational entities to advance its maritime and security agenda.

The UAE's approach has been marked by visible investments in ports and military infrastructure, including its Assab base in Eritrea and its lease in Berbera, Somaliland. Abu Dhabi has deliberately partnered with local or breakaway authorities whenever this served its strategic interests, reinforcing their autonomy while undermining national coherence. In contrast, Qatar has pursued a state-centric model, emphasizing institutional support, diplomatic mediation, and humanitarian outreach. While Doha has at times been associated with Islamist movements, its Horn strategy has been more pragmatic, focusing on consolidating fragile central governments and projecting influence through soft power rather than permanent military presence.

These divergent approaches illustrate a wider pattern of institutional versus subnational engagement. The UAE's willingness to strike deals with non-state actors offers speed and flexibility but often weakens national unity, while Qatar and Turkey's preference for central governments strengthens formal institutions but can alienate powerful regional stakeholders. These different modalities of engagement have produced recurring tensions within host countries, where rival Gulf patrons empower competing factions.

In parallel, both states have relied heavily on strategic communication to advance their narratives in the region. Qatar has employed its Al Jazeera network as a key instrument of soft power, shaping regional discourse and amplifying Doha's diplomatic positions, while the UAE has leveraged Sky News Arabia and related media outlets to promote its security - oriented vision and counter rival narratives across the HoA.

50. Samira Gaid, *Gulf Soft Power in the Horn: Competition vs Cooperation*, Report (Pretoria: Institute for Security Studies, 2022).

Despite these contrasts, there are also areas of convergence. Both blocs share concerns over Iranian influence in the Red Sea and HoA, particularly Tehran's support for the Houthis in Yemen⁵¹, which has directly threatened maritime traffic through the Bab-el-Mandeb Strait. Likewise, both recognize the destabilizing effect of piracy, terrorism, and the growing internationalization of Red Sea security, where Western and Asian naval powers have established enduring footholds. These shared anxieties underscore that while Gulf competition in the Horn often appears zero-sum, it is also embedded in a larger security environment where certain interests, such as protecting shipping routes or containing Iran, converge.

In sum, the UAE - Qatar/Turkey rivalry has transformed fragile political landscapes like Somalia into extensions of Gulf ideological battles. What may appear as development or security assistance has often deepened institutional rifts, creating parallel tracks of governance and external dependence. Yet, paradoxically, the very actors locked in rivalry are also bound together by overlapping threats, making the HoA a space of both polarization and reluctant commonality.

The “Traditionalist” Bloc: Saudi Arabia and Egypt

Saudi Arabia and Egypt have long positioned themselves as guardians of regional order, bound together by a shared interest in preserving regime stability and curbing the advance of political Islam. Unlike the UAE's transactional subnational partnerships or Qatar's soft-power diplomacy, this bloc has framed its HoA engagement in terms of traditional state-to-state relations anchored in hard security concerns and geopolitical continuity.

For Saudi Arabia, the Red Sea has become a vital extension of its national security perimeter. The Red Sea Council, officially launched in January 2020 as the *Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden*⁵², was designed to institutionalize cooperation among littoral states on maritime security, environmental protection, and economic integration. With Saudi Arabia as its primary architect, the Council aims to provide a platform for joint responses to piracy, smuggling, and emerging maritime threats, while reinforcing Riyadh's ambition to lead regional orchestration of Red Sea stability. This leadership reflects its ambition to institutionalize cooperation among coastal states and create a regional platform that can counterbalance Iranian influence and secure maritime trade routes. Riyadh's approach is shaped by the war in Yemen, where Houthi attacks on international shipping have threatened both global trade and Saudi energy exports. The Red Sea Council thus embodies both a strategic hedge against Tehran and a bid to consolidate Saudi Arabia's role as a convener of regional order.

Egypt's perspective is equally grounded in existential security concerns, though shaped more by the Nile Basin than by Gulf rivalries. Cairo's fears over Ethiopia's GERD and its downstream implications for water security have heightened its stake in Sudan's stability and in Red Sea security. Egypt has consistently supported the SAF and cultivated alignment with Gulf partners, particularly Saudi Arabia and the UAE, in opposing Islamist movements and reinforcing centralized state authority. For Cairo, the Red Sea is part of its southern

51. International Crisis Group, *Intra-Gulf Competition in Africa's Horn: Lessening the Impact*, Report no. 206 (Brussels: International Crisis Group, 2019).

52. Desirée Custers, “Red Sea Multilateralism: Power Politics or Unlocked Potential,” Stimson Center, 8 December 2021.

strategic depth, where maritime security directly intersects with regime security at home. This bloc's cohesion lies in its authoritarian preference: both Riyadh and Cairo prioritize strong central governments over decentralized or populist experiments, regarding them as safeguards against both internal upheaval and external encroachment. Their approach differs from the UAE's flexibility toward non-state actors and Qatar/Turkey's engagement with Islamist or populist forces, yet all converge in opposing Iran's encirclement strategy and in resisting the further internationalization of Red Sea security.

At the same time, this bloc's actions are not merely defensive. By linking security with economic interdependence, through trade corridors, Suez Canal revenues, and Gulf investments - Saudi Arabia and Egypt seek to position themselves as indispensable anchors of Red Sea stability. However, their preference for hierarchical state structures and military-backed regimes often leaves limited room for inclusive political processes, sometimes reinforcing authoritarian resilience at the expense of long-term reform.

In sum, the Saudi-Egyptian axis represents a "traditionalist" response to HoA instability: cautious, state-centric, and anchored in regime preservation. Their strategies converge with broader Gulf concerns over Iran and maritime security but diverge in method and tone from both the UAE's opportunism and Qatar/Turkey's populist leanings. This makes them both partners and competitors in shaping the Horn's evolving security order.

HoA Agency and Strategy

While the Gulf states have projected their rivalries into the HoA, it would be misleading to depict Horn countries merely as passive recipients of external agendas. Local governments and regional authorities have consistently exercised strategic agency, leveraging Gulf divisions to secure resources, recognition, and bargaining power. Djibouti illustrates the clearest example of strategic pragmatism. By hosting military bases for the United States, China, France, and Japan, Djibouti has generated substantial revenue - estimated at around USD300 million annually- while simultaneously ensuring that no single foreign power can dominate its political space. Gulf rivalries have been carefully managed, with President Ismail Omar Guelleh balancing relationships without overtly siding with either the UAE or Qatar⁵³. This "base-hosting" model reflects a deliberate policy of extracting maximum benefit from international interest while maintaining a stable domestic framework.

Eritrea, in contrast, has pursued a transactional but cautious approach. Initially, Asmara aligned with the UAE and Saudi Arabia during the Yemen war, granting access to the port of Assab. Yet by 2022,⁵⁴ it distanced itself, accusing the UAE of fuelling conflict with Ethiopia. Eritrea remains reluctant to commit to multilateral frameworks like the Red Sea Council, preferring autonomy over integration. This underscores a broader divergence within the Horn: while some states seek collective platforms for security and development, others prioritize sovereignty and resist external institutionalization.

53. Alex de Waal, *Pax Africana or Middle East Security Alliance in the HoA and the Red Sea?*, Policy Paper (Medford, MA: World Peace Foundation, 2019).

54. Martin Plaut, "Eritrea Accuses UAE of Stoking War with Ethiopia, Appeals to Saudis to Intervene," Martin Plaut Blog (blog), 17 November 2023.

Taken together, these cases demonstrate that Horn states are not merely arenas of Gulf competition; they are strategic players in their own right, adept at navigating rivalries to extract resources and legitimacy. Yet, this agency comes at a cost. By inviting external sponsorship to reinforce domestic agendas, local actors deepen internal rivalries and perpetuate governance fragility.

At the same time, there are areas where Horn states share common ground with Gulf patrons. They remain wary of foreign naval encroachment in the Red Sea, particularly the proliferation of US, Chinese, Russian, and European forces around Djibouti and the Gulf of Aden. For fragile regimes, the internationalization of Red Sea security threatens to marginalize their own agency. Likewise, piracy, terrorism, and Houthi attacks represent shared threats that encourage at least partial cooperation between local and Gulf actors.

Ultimately, Horn governments navigate a delicate balance: exploiting Gulf competition for short-term gain while guarding against being subsumed by it. This balancing act reflects both resilience and vulnerability, making the Horn not just a theatre of Gulf rivalry but also a region where local strategies decisively shape external outcomes.

Reflection and Outlook

The evolution of the Red Sea from a critical commercial waterway into a fault line in geoeconomics has produced risks and opportunities. It remains a space where players in the Gulf and HoA can slide into zero-sum confrontations or create a framework of cooperative security and common prosperity. As regional and international powers pursue naval competitions, the Gulf states are faced with a fundamental choice: allow fragmented agendas prevail or come together around a common vision. The latter would require leadership marked by courage and consensus-building initiatives based on mutual interest.

First, all involved actors need to accept that fragmented unilateralism has negative dividends for all. The UAE's assertive acquisition of ports, along with its construction of military bases in the HoA, and Qatar's support for the "other side" is causing challenges to domestic legitimacy. For example, in Somalia, the federal government and regional administrations have developed divergent external alliances, leading to institutional incoherence and deepening distrust between the centre and the periphery. In Sudan, competing Gulf allegiances have exacerbated internal divides, contributing to the breakdown of political consensus and fuelling ongoing instability. For Gulf states, rising maritime risks, energy market volatility, and reputational costs associated with proxy conflicts have made unilateral interventions costly and unsustainable. Moving forward, Gulf powers must shift from zero-sum engagements to inclusive regional approaches, ones which uphold their strategic influence but are grounded in mutual respect, local ownership, and long-term regional stability. This shift could occur through a gradual institutionalization of cooperative security mechanisms already in place. The Red Sea Council offers a nascent framework for dialogue, maritime coordination, and crisis management among Red Sea littoral states, including both Gulf and African members. Strengthening this council, by expanding its agenda beyond narrow security concerns to include economic integration, environmental protection, and maritime infrastructure, would create shared incentives for stability. A cooperative framework, anchored in shared trade corridors, maritime safety, and regional logistics integration, would better protect

Gulf investments and supply chains while enhancing soft power across Africa and the Red Sea corridor. In this sense, the evolution from competitive securitization to cooperative regionalism is not merely idealistic but strategically rational: it aligns Gulf states' long-term economic diversification goals, such as those articulated in Saudi Vision 2030, with the stability of their surrounding maritime neighbourhood.

Second, institutionalizing Gulf–Horn cooperation requires building on lessons from past efforts. Initiatives like the Red Sea Council and IGAD have made important contributions, but they have struggled with limited inclusivity, weak coordination, and political rivalries. A more effective alternative would be a pragmatic, flexible framework that includes both coastal and non-coastal states, while offering concrete incentives for participation, such as shared port development funds, access to Gulf-backed trade corridors, customs harmonization, and maritime security coordination. Regional powers like Turkey could be included based on clear criteria of constructive engagement, while the inclusion of Ethiopia, though economically essential, must be carefully balanced to avoid triggering objections from Egypt, whose buy-in remains strategically vital. A tiered or modular format, combining full membership, observer roles, and issue-specific task forces, could help manage sensitivities without excluding key stakeholders. The goal is not to replace existing institutions, but to create a leaner, more focused platform anchored in mutual interest, shared benefits, and regional legitimacy.

Third, the management of narratives, perceptions, and the soft power influence of both Qatar and the UAE should not be overlooked. Media wars have played a role in the division, with channels such as Al Jazeera and Sky News Arabia reinforcing polarized views. A coordinated communications strategy can build public support for cooperative projects and reduce disinformation. Educational and cultural exchanges, particularly among youth, would foster a sense of shared destiny across the Red Sea.

Finally, security frameworks must be inclusive. Current security naval operations on the Red Sea are controlled by Western powers. A regional maritime security structure could be built around joint patrols, anti-piracy deterrence, and intelligence-sharing centres. A Red Sea naval force, modelled on Combined Maritime Forces but under a regionally commanded structure, would serve this purpose. The road to cooperation comes with hurdles. Different ideologies endure, trust is delicate, and worldwide competition over influence complicates effective action locally. A move towards constructive cooperation will not merely benefit the Gulf, but also enhance the robustness of worldwide trade, safeguard environmental assets, and secure local autonomy. The Red Sea does not have to be a fault line; it can be a bridge if these countries decide to make it collectively.

Chapter 3

A European Way in the Red Sea?

By Cinzia Bianco

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A European way in the Red Sea?

The Red Sea has become increasingly central in the calculations of European capitals, chiefly as a crossroads for global connectivity, whether in terms of trade, energy, and digital infrastructures. At the same time, Europeans are watching with increasing concern the proliferation of different challenges emanating from the region – from the operations of Yemen’s Houthi rebels to piracy, smuggling, and great power tensions causing simmering instability. For too long, the Red Sea has drifted below the radar of European policymakers, often falling between different regional departments within ministries or different areas of military command. The choice to look at the two shores of the Red Sea as belonging to two separate regions – namely, the Middle East and Africa – has created a lack of coherence in the European approach to this space, which no longer works in an era of interconnectedness. With more pressing geopolitical challenges arising, European policymakers may be tempted to overlook the Red Sea. But left unchecked, the region’s emergence as a flashpoint of security crises directly threatens Europe’s interests, aggravating risks of irregular migration and terrorism, destabilizing economic and energy security and inviting rival great powers like Russia or China to weaponize this strategic region against Europe. Both the European Union and individual EU Member States have been trying, especially over the past couple of years, to put forward policy responses to confront these challenges and defend strategic interests. Europeans are competing to be key investors, especially in sectors linked to the energy transition, and meaningful diplomatic actors, leveraging long-lasting relations with various regional actors. The premises are solid, but could be significantly strengthened in both consistency, scope, and weight in the way that this piece will explore. It is critical that Europeans prepare for these scenarios by reshaping their policy around the interconnectedness of these geopolitical theatres and their impacts.

Mapping the Engagement: Patterns and Trends

European engagement in the Red Sea —both at the national level and through the EU— has concentrated on two key domains, where Europe perceives a competitive advantage: maritime security and connectivity. However, the divergent —and at times competing— interests of individual Member States have contributed to uncertainty and lack of decisiveness in Brussels, ultimately limiting the EU’s influence in shaping the geopolitical dynamics unfolding in the Red Sea.

Despite this fragmentation, a core group of Member States has consistently demonstrated stronger interest and deeper involvement in the Red Sea arena, helping to drive and sustain European engagement. France views the Red Sea as a critical corridor for maintaining access to its overseas territories in the South-West Indian Ocean and consolidating its presence in Africa, a key geopolitical priority, also via its military base in Djibouti.⁵⁵ Italy - which has declared maritime security in the Red Sea a top priority in the 2024 G7⁵⁶ - has maintained a military base in Djibouti since 2013 to provide support to Italian military operations in

55. Marc Abensour, “The Geopolitics of the Indo-Pacific: France’s Strategy,” Groupe d’études géopolitiques, 27 February 2025.

56. Italian Ministry of Foreign Affairs, “UNGA79: Italy’s Minister of Foreign Affairs Tajani Chairs G7 Meeting of Ministers of Foreign Affairs in New York,” Press Release, 23 September 2024.

the area, as well as training services to partners such as Somalia. Other European countries with a maritime tradition, such as Greece and Denmark, also attach great importance to safety and freedom of navigation in the Red Sea and the Gulf of Aden. Twelve European nations are active members of the Combined Maritime Forces led by the US.

Recent years have seen the EU itself become a more active player, building on Member States' sustained presence and strategic interests in the region. In 2022, the EU defined the North-West Indian Ocean (NWIO) - an area stretching from the Strait of Hormuz to the Tropic of Capricorn and from the Northern Red Sea to the middle of the Indian Ocean - as a Maritime Area of Interest. Europeans are engaged in two different maritime security missions. The first, EUNAVFOR ATALANTA, was launched in 2008 with a focus on countering piracy off the Somali coasts. More recently, in 2024, the EU initiated ASPIDES to counter escalating Houthis attacks in the Red Sea, with naval assets provided by Italy, France, and Germany.⁵⁷ ASPIDES marks a significant shift from a narrow focus on piracy to a broader maritime security agenda. This strategic shift reflects Europe's growing effort to respond to emerging threats in the Red Sea and to assert a more autonomous role in regional security, particularly as the United States - traditionally, the region's security guarantor - has retrenched from its role and asked European allies for increased burden sharing. However, unlike US-led initiatives such as Operation Prosperity Guardian (launched in December 2023), which included offensive action, ASPIDES' tasks are defensive and include accompanying and protecting merchant ships, monitoring and assessing threats, and enhancing information-sharing.

Another key strand of European engagement in the Red Sea is on connectivity, both in terms of trade, energy, and digital. Red Sea ports, especially on the African shore, from Djibouti to Egypt, have for decades been central in connecting Europe to both Africa and Asia, with a particular reliance on the Suez Canal. Today, around 40 percent of EU trade with Asia passes through the Suez Canal.⁵⁸ With trade, energy, and digital infrastructure increasingly subject to power competition, actors such as China are building connectivity projects to enhance their own economic security - and disrupt Europe's. China in particular has emerged as the second largest investor in the area, with the EU following close behind.⁵⁹ Countries on the Eastern shore of the Red Sea are key nodes in the India-Middle East-Europe Economic Corridor (IMEC), the strategic connectivity route which will link Asia to Europe via the Red Sea through undersea digital cables, trade and logistic links as well as a hydrogen pipeline. As the Gulf, India and south-east Asia grow in economic importance to Europe, the Asia-Europe axis is becoming more vital. At the same time, IMEC is slated to transit through the Strait of Hormuz, exposing it to instability linked to rising tensions with Iran. The 2025 war between Israel and Iran, in particular, has come with fresh Iranian threats to blockade Hormuz. Despite also facing instability, especially in Yemen and in some HoA territories, maintaining an alternative that involves the Western shore of the Red Sea, countries of the Horn as well as Egypt, remains a sensible idea to diversify and de-risk connectivity projects.

57. ASPIDES' other members are Belgium, Denmark, Germany, Greece, the Netherlands, Portugal, and Norway

58. European Parliament, "Maritime Security: Situation in the Red Sea and EU Response," At a Glance Report (Brussels: European Parliamentary Research Service, 2024).

59. Middle East Institute, China's Maritime Silk Road and Security in the Red Sea Region, Report (Washington, DC: Middle East Institute, 2023).

Even if the EU continues to shorten supply chains through nearshoring and reshoring, Europe's scarcity of raw materials means safe, long-distance shipping routes remain an essential component of its long-term economic security. In this context, the Red Sea region will continue to grow in strategic importance for Europe. The EU, as well as European countries, is stepping up diplomatic engagement with littoral states and competing with other global and regional players to become partners-of-choice as strategic investors.

Impact on Regional Dynamics

Despite this commitment, European engagement in the Red Sea region has so far yielded limited results, falling short of its full potential and failing to significantly alter the underlying dynamics. Operational gains have not translated into strategic impact, as patterns of fragmentation, rivalry, and instability remain largely unchanged. As a result, Europe finds itself in a position of strategic marginality: it does not foster regional fragmentation, yet it lacks the capacity to meaningfully influence the region's trajectory or act as a facilitator of regional integration.

In the domain of maritime security, the EU missions, particularly ASPIDES, have contributed to maritime security efforts, but have not reaped the hoped-for results. The mission has successfully executed hundreds of close protection operations for commercial vessels and managed to repel numerous attacks by the Houthis in the southern Red Sea and the Gulf of Aden, demonstrating a degree of operational efficiency and resolve. However, despite these tactical successes, the broader strategic objectives remain unmet. Houthi attacks continue with high frequency, signalling the group's sustained capabilities and determination. Meanwhile, illicit trafficking activities have not only persisted but intensified, pointing to enduring structural weaknesses in the current approach.

European policy responses to these developments have been largely reactive and insufficient. While naval deployments signal a recognition of the problem, they fall short of addressing its root causes or stemming its expansion. Despite a consistent European naval presence, the majority of merchant vessels now avoid the region entirely. Between October 2023 and March 2025, the weekly moving average of daily ship passages through the Suez Canal fell by an estimated 55 percent.⁶⁰ This decline reflects a lack of confidence in the security environment. Major shipping companies have increasingly opted to reroute their vessels around the Cape of Good Hope, adding 10 to 12 days to their journeys but avoiding insurance surcharges and the high transit fees of the Suez Canal. This shift has led to a sharp increase in transportation costs along the Asia-Europe trade axis, straining supply chains and raising prices for European consumers and businesses.⁶¹

These limited results are attributable to some structural weaknesses of the EU's maritime presence, such as lack of appropriate resourcing – as European Member States have not deployed enough assets for a significant amount of continued time; a fragmentation across in multiple operations, each with its own separate chains of command and instruments, but partially overlapping mandates; and an insufficient level of integration with regional partners.

60. European Council for Foreign Relations, "Anatomy of a chokepoint: Mapping power and conflict in the Red Sea".

61. European Parliament, "Red Sea Crisis: Implications for EU Trade and Energy Prices," Briefing (Brussels: European Parliamentary Research Service, 2024).

Energy security represents another area of concern. Since the onset of the war in Ukraine, European nations have sought to reduce dependence on Russian gas and oil, turning instead to Gulf suppliers. This pivot has increased the strategic importance of the Red Sea as a transit corridor for energy resources, including liquefied natural gas and crude oil. Approximately 25 percent of the EU's oil and natural gas imports pass through the Red Sea and the Suez Canal.⁶² Any disruption to maritime traffic in this region, whether from attacks or logistical bottlenecks, poses a direct threat to Europe's energy resilience. Even though the EU and individual European countries have worked hard to diversify their energy supply routes, a single strike on a tanker or port infrastructure in the Red Sea could still reverberate across European markets, causing price spikes and potential shortages.⁶³

In addition to energy and goods, the Red Sea is a critical artery for global digital infrastructure. Submarine internet cables that connect Europe to Asia and the Middle East run through the Gulf of Aden. Houthi attacks between March and August 2024 have indirectly damaged this infrastructure, resulting in the rupture of four major submarine cables⁶⁴. This forced approximately 25 percent of data traffic between Europe and Asia to be rerouted, leading to connectivity issues, increased latency, and heightened vulnerability to cyber threats. Such incidents highlight the extent to which the Red Sea's instability impacts not only regional actors but the broader global system.

Reflections and Outlook

In an environment increasingly defined by competing fault lines and great power rivalries, this marginal position risks rendering Europe irrelevant in shaping the future of a region critical to its own economic and security interests. It is thus fundamental for the EU to adopt a more comprehensive, coordinated, and strategic approach—one capable of influencing the broader forces at play, mitigating security risks as well as regional fault lines, and ultimately safeguarding Europe's long-term interests in the Red Sea.

A crucial first step would be for European countries to approach the Red Sea as a coherent region, acknowledging the interconnection between dynamics on the African and Middle Eastern sides and how they inform regional geopolitics, as underlined in this book. This means bridging the compartmentalisation that often separates the African and Arab expertise within European administrations and encouraging the creation of comprehensive dialogue platforms. This requires a strategic reframing of the EU's compartmentalized approach to the region, bringing forward a comprehensive EU strategy for the Red Sea. Such a strategy should prioritize the deepening of political engagement with all main Red Sea stakeholders, particularly all coastal states.

62. Joint Research Centre, Impact of Red Sea Disruptions on EU Trade: Evidence from AIS and Trade Data, Technical Report (Luxembourg: Publications Office of the European Union, 2024).

63. European Parliament, "Red Sea Crisis: Implications for EU Trade and Energy Prices," Briefing (Brussels: European Parliamentary Research Service, 2024).

64. The damaged cables were: Asia-Africa-Europe 1 (AAE-1); Europe India Gateway (EIG); Seacom; TGN-Gulf. Source: Middle East Eye, "Rubymar Sinking: Did Houthi Ship Attack Sever Red Sea Internet Cables?", 7 March 2024.

Such an integrated approach would be crucial for strengthening European credibility, including as a maritime security provider, which should remain the primary focus for Europeans as an instrument to support their political and diplomatic engagements as well as safeguarding stability, connectivity, and trade interests. Recognizing that they have stretched resources and many interests in different parts of the globe, Europeans should not attempt to do too many things in the region at an inadequate level. They should find ways to make maritime security the pivot of their presence and build around it. For instance, Europeans should double down on their work enhancing the maritime security capabilities of regional partners. A number of European countries have for years regularly exercising, training, or cooperating with the Gulf monarchies on maritime security.

These individual countries have moved independently from the EU, both because they have competing interests in influence in Africa and because they could not get consensus in Brussels for a more robust and coordinated EU presence and strategy. Italy, France, and the EU all have maritime security projects in Somalia and Djibouti aimed at capacity-building among Red Sea states. In Somalia, European countries should maintain the counterterrorism effort, especially in case of US troop withdrawals, something that US President Donald Trump already decided in 2019.⁶⁵ European countries and the EU should also support the recent Ethiopia-Somalia agreement mediated by Turkey, which is key to alleviating tensions between Ethiopia and its neighbours.

However, a European approach would also demand broadening the scope of maritime security missions beyond the military mandate. This is something that the Europeans have not attempted to do in the Red Sea. Strengthening ASPIDES' mandate with a diplomatic and de-confliction dimension, specifically towards Iran, may be crucial in disentangling regional crises like those in Yemen. A similar deconfliction platform could open a channel to also address other conflicts, such as those of Sudan, where Red Sea actors have a fundamental role to play.

Although the Red Sea is becoming increasingly politicized, making cooperation more difficult, Europeans should not give up on multilateralism. The erosion of US leadership and the competitive, fragmenting political landscape have slowed down cooperation between the EU and other global and regional actors. In the face of growing instability in this body of water, this trend needs to be reversed, including through region-to-region fora. Europeans also should explore more seriously the opportunity to cooperate with Asian counterparts, despite current difficulties. China has been so far extremely reluctant to pressure Iran or the Houthis and has escorted very few ships since the beginning of the crisis – demonstrating the economic price Beijing is willing to pay in order to see the US bogged down in MENA conflicts.⁶⁶ However, in the longer term, the Chinese navy may be persuaded to step up to at least protect the infrastructure of the Red Sea countries that joined its Maritime Silk Road. India and Japan also have limited involvement in maritime security operations in the Red Sea. India, for whom 80 percent of trade with Europe and the US passes through the Red Sea, deployed two warships in the Gulf of Aden and ten in the Northern and Western Arabian Sea, as well as surveillance aircraft, but with an

65. Associated Press, “Biden to Deploy US Troops to Somalia, Reversing Trump’s Ordered Withdrawal,” PBS News, 16 May 2022.

66. David Scott, “China’s Calculated Inaction in the Red Sea,” Center for International Maritime Security (CIMSEC), 6 May 2024.

anti-piracy mandate.⁶⁷ The importance of the Red Sea in India's connectivity plans and Oman's recent decision to allow an Indian logistics outpost in the port of Duqm opens up the possibility of greater involvement from New Delhi's Navy. Japan, whose shipping companies have stopped transporting goods through the Red Sea, also contributes exclusively to anti-piracy activities from its small military outpost in Djibouti.⁶⁸ For Tokyo, despite its absolute dependence on Gulf hydrocarbons, the region is too far from concerns of the immediate neighbourhood of the Pacific Ocean.

From a regional perspective, both in the Horn and the Gulf, such a renewed European approach would strengthen Europe's credibility and make it a necessary interlocutor across the board. Regional countries crave committed partners that refrain from predatory practices and seriously work toward building political dialogue that respects the priorities and interests of actors in such a sensitive region. Red Sea actors also need a coherent European approach that avoids unnecessary intra-EU divisions and compartmentalization that only create strategic confusion. As such, Europeans need to confront and overcome their divisions and divergences and find a collective – or, at least, strictly aligned and coordinated – approach. If Europeans can do that, they can finally emerge as alternative interlocutors alongside other global actors.

67. Manoj Kumar and Mayank Bhardwaj, "India's Small Exporters Reel as Red Sea Crisis Helps Rivals Nab Business," Reuters, 16 February 2024.

68. Alessio Patalano, "Japan Should Play Part in Protecting Red Sea Shipping," Nikkei Asia, 27 May 2024.

Chapter 4

Assessing the United States Policy in the Red Sea

By Gawdat Bahgat and Katherine Holden

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Assessing the United States Policy in the Red Sea

Since the early 2000s, the Red Sea basin has attracted increasing attention from the United States and other global powers. This interest builds on the region's strategic location as a major corridor for international trade between Europe and the United States on one side and Asian markets on the other side. Yet the region's strategic value stands in stark contrast to its persistent fragility. For decades, several of these littoral states, particularly in East Africa, and some of their neighbours have experienced significant political stagnation, low or negative economic growth, civil wars, state failures, secession movements, terrorism, and piracy. This fragility and the strategic location have fuelled foreign intervention by several regional powers such as Qatar, Saudi Arabia, the United Arab Emirates (UAE), Iran, Israel, and Turkey, pursuing overlapping and often competing economic and strategic interests. The resulting rivalries have been further intensified by the lack of an effective mechanism to deescalate conflict between external powers and their regional allies.

Within this complex environment, Washington's engagement in the region has been marked by inconsistency and fragmentation. As this chapter points out, despite the Red Sea's growing commercial and strategic importance and the heightened security threats, the United States has not formulated a comprehensive strategy to address these challenges and promote its interests, failing to address the basin as a coherent geopolitical space. Within US foreign service and defence bureaucracy, there is no single bureau focusing on the Red Sea region: in the Department of State, the Bureau of Near Eastern Affairs and Bureau of African Affairs share oversight, while in the Pentagon, two combatant commands (CENTCOM and AFRICOM) split operational responsibilities for the Red Sea. The Arabian Peninsula and the sea itself fall under CENTCOM's area of responsibility, while the African littoral (except Egypt) is covered by AFRICOM. This fragmentation reflects Washington's approach, largely focused on interacting with local and regional developments without a clear holistic vision, reacting to crises rather than shaping long-term vision for peace and security for the whole Red Sea region. As a result, Washington's policy has remained primarily driven by counterterrorism and antipiracy efforts, especially in the aftermath of the 9/11 attack, with limited attention to supporting economic development and political stability.

To focus on this, this chapter examines the two main drivers which defined US policy in the Red Sea – terrorism and piracy, and then assesses how Washington has sought to address these challenges working with its regional allies. The third section then turns to the broader geopolitical landscape, examining the competition between Washington and both Moscow and Beijing. The chapter concludes by drawing together the main takeaways.

Counterterrorism and Antipiracy: the Core Drivers of US Policy in the Red Sea

One of the major drivers of US policy in the Red Sea has been the fight against piracy, a phenomenon rooted in political instability, insurgency, and civil war that fuelled its initial surge in the early 1990s. In the following decade and a half, Somali pirates intensified

their attacks in coastal and international waters driven by lucrative returns, inflicting significant losses on both global trade and regional economies. According to the World Bank, it is estimated that the pirate attacks cost the global economy roughly USD18 billion a year in increased trade expenses.⁶⁹

After the peak reached around 2012, the frequency and intensity of pirate attacks off Somalia have reduced in recent years, mainly as a result of naval patrols by a coalition of forces from the US, UK, Japan, Canada, and the EU, as well as the deployment of armed guards on commercial vessels and the arrest and prosecution of pirates.⁷⁰ Within this coalition, Washington played a prominent role, in particular by establishing its first permanent military base (Camp Lemonnier) in Djibouti in 2001. With approximately 4,000 US joint allied forces, military and civilian personnel, this base serves as AFRICOM's primary base of operations in the HoA.⁷¹ Yet despite these successes, Somali piracy is largely perceived as a dormant threat rather than a fully suppressed one. Indeed, the deployment of international naval forces has reduced pirate attacks at sea, but has not addressed the roots of the problem, i.e. stagnant economic conditions and corruption. Somalia continues to have a reputation as the launching point for terrorism, piracy, human trafficking, and smuggling operations.⁷² Prospects for stability were dealt a heavy blow in January 2024 when the government of landlocked Ethiopia signed a preliminary agreement with Somaliland, a self-declared breakaway republic in northwestern Somalia, granting Addis Ababa commercial and military access to the Red Sea.⁷³

In addition to piracy, terrorism has been a major concern and driver of US policy in the Red Sea, especially following the 9/11 attacks in the United States, as the southern part of the Red Sea region has emerged as a key front in the war on terrorism due to the presence of several terrorist organizations, including Al-Shabab, Al-Qaida in the Arabian Peninsula, Al-Houthis, and other non-state actors. These concerns have been further exacerbated by more recent events in Yemen and Gaza. The collapse of central authority in Yemen and the rise of the Houthis⁷⁴ and their attacks on commercial ships since 2023 have been Washington's main focus in the Red Sea. In response to Israeli attacks on Gaza, the Houthis, an armed group that controls much of northern Yemen, have used drones and missiles to target ships affiliated with Israel.

In particular, the Houthis' attacks on commercial ships and US efforts to stop these attacks have further complicated the fragile political and security environment in Yemen. After years of fighting between Saudi and Emirati forces on one side and the Houthis on the other, the UAE decided to end its involvement in the war and Riyadh successfully negotiated a temporary truce in 2022. While senior officials from Saudi Arabia and the

69. World Bank, "Ending Somali Piracy: Go After the System, Not Just the Pirates," Feature Story, 11 April 2013.

70. International Chamber of Commerce, "Piracy and Armed Robbery against Ships," International Maritime Bureau (IMB), 16 October 2025.

71. US Navy Region Europe, Africa, Central, "Welcome to Camp Lemonnier, Djibouti," Official Website, accessed 4 May 2025

72. United Nations Office on Drugs and Crime, "Gulf of Aden and the Red Sea," UNODC Maritime Crime Programme, 2024, accessed 27 May 2025.

73. Abdi Latif Dahir, "Why a Port Deal Has the HoA on Edge," The New York Times, 2 January 2024.

74. For a recent analysis of the conflict in Yemen and US policy see: Congressional Research Service, Yemen: Conflict, Red Sea Attacks and US Policy, Report no. IF12581 (Washington, DC: Congressional Research Service, 22 July 2025).

Houthis exchanged visits in 2023, and peace seemed in sight⁷⁵, the attacks on commercial vessels brought these political negotiations to a standstill. A close examination of the Saudi reaction to the al-Houthis' attacks on commercial vessels underscores Riyadh's unwillingness to join Western powers in any efforts to protect Israel and its preference to place a high priority on reaching a permanent peace in Yemen.⁷⁶ Indeed, despite the key commercial and strategic significance of the safety of oil and gas shipments from the Gulf through Bab-el-Mandeb Strait, regional powers have not succeeded in reaching a consensus on a regional strategy to ensure peace and security in these two crucial waterways⁷⁷. Rather, global powers have taken the lead in securing the safety of commercial vessels and oil and gas tankers.

This evolving security environment builds on a much longer history of US security-oriented engagement in the region. As early as 1949, the US Navy created the Middle East Force (MEF), marking the transition of the Navy's presence from periodic to essentially permanent. Since then, the US naval presence and role in maritime security in the Gulf has grown and become more institutionalized. In 1971, the MEF established a base in Bahrain and 12 years later (1983) the US Naval Forces Central Command (NAVCENT) was founded. In 2002, the Combined Maritime Forces (CMF), a coalition between the US and its international and regional partners was created.⁷⁸ The 39 state partners support 5 task forces focusing on counterterrorism, counter-piracy, and maritime security in both the Strait of Hormuz and the Gulf of Aden. This last one, known as the International Maritime Security Construct (IMSC) was established in 2019 and headquartered in Bahrain. Its main objective is to deter threats in and around the Strait of Hormuz and Bab-el-Mandeb.⁷⁹

Responding to rising tension in the Gulf, the CMF launched Operation Sentinel in 2019, with the goal of ensuring freedom of navigation and free flow of commerce in international waters of the broad Middle East.⁸⁰ Four years later (2023) and in response to the Houthis' attacks on commercial vessels in the Red Sea, then Secretary of Defense Lloyd Austin announced a new initiative called Operation Prosperity Guardian as an extension of CMF, with the objective of protecting merchant vessels in the Red Sea.

It is interesting to note that, with the exception of Bahrain, other US partners have chosen not to join the newly formed US led operation. At least four reasons can explain their reluctance and their desire to publicly distance themselves from Washington. First, given the Biden and Trump administrations' strong support for Israel and the overwhelming Arab public opinion's backing of the Palestinians, many Arab governments preferred to keep their distance from the United States. Second, US Arab partners and other nations might have wanted to avoid being targets the al-Houthis' retaliation if they took the US (and Israeli) side. Third, the GCC states, Turkey, Egypt, and other Arab states had sought to de-escalate tension with Iran in the last few years, and siding with the United States

75. Sana'a Center for Strategic Studies, "Houthis Make Official Visit to Riyadh for Talks with Saudi Arabia," Analysis, 18 September 2023.

76. Reuters, "Saudi Arabia Urges US Restraint as Houthis Attack Ships in Red Sea," 6 December 2023.

77. Arab Center Washington DC, "Assessing GCC Perspectives on American-British Strikes against Yemen's Houthis," Analysis, September 2024.

78. US Naval Forces Central Command, "History: US Naval Forces Central Command," Official Website, 2024.

79. US Naval Forces Central Command, "International Maritime Security Construct Holds Change of Command," Press Release, February 2024.

80. The Defense Post, "New US-Led Coalition Launches Operation Sentinel to Protect Persian Gulf Shipping," 7 November 2019.

and attacking the Houthis would have undermined this policy. Finally, since the early 2020s, the Saudi leaders appear to have concluded that the war in Yemen was unwinnable and represented a significant burden on their ambitious economic development plans. Under the second Trump administration, the United States and the United Kingdom have intensified their military operations against the Houthis. Whether these operations can stop attacks on commercial shipping remains uncertain, reinforcing the view that there is no substitute for a diplomatic solution coordinated with regional powers.⁸¹

Reasserting US security-driven approach amid rising global competing

With the largest economy in the world and strategic objectives around the globe, the United States has obvious interests in the security and stability of the Red Sea basin, even though US interests are arguably less critical than those of other global powers in Europe and Asia. About 15 percent of trade between these two regions traverses through Bab-el-Mandeb, the Red Sea, the Suez Canal and the Mediterranean Sea.⁸² This means that for these global powers, engagement in the Red Sea reflects a complex mix of cooperation and competition, as each seeks to secure trade routes while advancing its geopolitical influence. These intertwined patterns of cooperation and competition among global powers have inevitably shaped the environment in which the United States defines and pursues its own interests in the Red Sea.

Russia's engagement in the region illustrates this dynamic well. Containing and resisting perceived Western domination of the maritime domain and projecting power have been key drivers of Soviet and later Russian policies for decades, as Moscow has always perceived the Red Sea as a gateway to expand its influence in the Indian Ocean, the Mediterranean Sea, and Africa. Within this context, the Soviet Union established strong strategic ties with several regional powers, including Egypt, Sudan, Ethiopia, Somalia, Eritrea, and the People's Democratic Republic of Yemen (South Yemen). However, instability in some of these countries and the dissolution of the Soviet Union dealt a temporary blow to the its influence in the Red Sea basin.

However, Moscow's ambitions in the Red Sea did not disappear with the end of the Cold War. In recent years, Russia has sought to revive its regional presence and project its maritime power, most notably through the 2015 Maritime Doctrine and the 2022 Maritime Strategy. Additionally, the fall of the Assad regime in Syria in late 2024 has fuelled Russia's interest in establishing a presence in the Red Sea,⁸³ Under President Assad, Russia used its Memmi airbase and Tartus naval base to support its operations in the Middle East and Africa, and the future of these facilities under the new regime in Damascus is not clear. Despite this growing Russian interest in the Red Sea, it faces major challenges, particularly instability in both Sudan and Yemen and the lack of financial resources to cement its influence.

81. International Crisis Group, *Calming the Red Sea's Turbulent Waters*, Report no. 248 (Brussels: International Crisis Group, 21 March 2025).

82. International Monetary Fund, "Red Sea Attacks Disrupt Global Trade," IMF Blog, 7 March 2024.

83. International Institute for Strategic Studies, "Tartus Port and Syria's New Geo-economic Strategy," Online Analysis, July 2025.

With one of the fastest growing economies in the world and rising military capabilities, China's global economic and strategic interests have expanded in the last two decades. Chinese leaders present their country as a rising global power that opposes foreign intervention in other countries' domestic affairs and often as a victim of regional instability in the Red Sea and elsewhere due to misguided US foreign and defence policies. In order to foster its economic and political global outreach, Beijing has taken several initiatives, such as the Belt and Road Initiative and the Maritime Silk Road - the latter seeks to promote cooperation in maritime security in South Asia, the Indian Ocean, the Red Sea, and Europe.

In line with these strategies, China has expanded and deepened its economic and security ties with the Red Sea littoral states. Beijing is the main investor in the construction of Egypt's new administrative capital and a key player in the Suez Canal economic zone. Chinese companies are involved in building infrastructure facilities in Jeddah on Saudi Arabia's Red Sea coast. The country's first overseas military base is in Djibouti. In Yemen, Beijing opposes US and United Kingdom military strikes on Houthi targets and unlike American (and Israeli) ships, Chinese vessels have enjoyed relative safety in crossing Bab-el-Mandeb and the Red Sea.⁸⁴

The way forward

In the last decade, several governments and private corporations have proposed different schemes to facilitate trade between Asia and Europe. The long list includes the India-Middle East-Europe Economic Corridor (connecting Asia to Europe via Saudi Arabia, Jordan, and Israel), the International North-South Transport Corridor (linking Russia, Iran, Azerbaijan and Central Asia); and the and Development Road Project (extending from Asia to Europe via Iraq and Turkey). These ambitious projects can significantly transform global trade. However, they all face tremendous financial and geopolitical challenges. It will take many years for these projects to be completed and some of them might never materialize. This means that at least in the near future the Red Sea will continue to be the major trade link between east and west.

The enduring centrality of the Red Sea to global commerce therefore underscores the importance for the US to shift its approach and adopt a coherent and holistic framework for the region. Indeed, as shown in this chapter, the US policy in the Red Sea basin demonstrates a lack of a comprehensive strategy to promote and maintain peace and stability in the region and an over-reliance on military force. Washington needs to work with governments and civil society on both sides of the Red Sea to promote an inclusive approach that would include all ethnic and religious communities and support building institutional capacity. Similar efforts should be made with regional powers to de-conflict their economic and strategic interests and build a consensus on regional cooperation. Finally, the global competition between Washington, Moscow, and Beijing should not be seen in zero-sum terms. Restoring security to this strategic waterway would stabilize the global economy and serve the interests of local, regional, and global powers.

84. Atlantic Council, "How China Turned the Red Sea into a Strategic Trap for the US," MENASource Blog, May 2025.

Chapter 5

China's Active Engagement across the Red Sea: Testing the Limits of Great Power "Strategic Neutrality"

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China's Active Engagement across the Red Sea: Testing the Limits of Great Power “Strategic Neutrality”

China's presence in the Red Sea region has been strengthened by the BRI. The extensive size of the BRI provides China with distinct advantages over many local economies and allows it to compete with global ventures in the region.⁸⁵ In pursuing the expansion of economic ties, Beijing remains politically cautious, presenting itself as a neutral actor committed to the principles of sovereignty and non-interference, one that avoids entanglement in local conflicts. China also cloaks these asymmetric relationships in a discourse of Global South (GS) solidarity.⁸⁶ In addition to economic ties, China established its first overseas military base in Djibouti in 2017. This base demonstrates China's military presence and blue-water capabilities granting its naval power a direct foothold in the region. Beijing frames its military presence as primarily aimed at protecting its trade routes and the safety of its nationals and portrays these policies as neutral and defined by a deliberate abstention from intervening in domestic political affairs. Yet this military dimension, which feeds into regional rivalries, stands in tension with its claimed strategic neutrality.

This chapter analyses the implications of China's expanding engagement with the broader Red Sea region, in order to evaluate the boundaries of the notion of strategic neutrality. This concept captures China's pursuit of expansive economic embeddedness combined with a military presence, while championing discourses of political caution and neutrality. Strategic neutrality allows China to benefit from economic and security entrenchment without incurring political risks or costs typically associated with hegemonic presence. This chapter questions the limits of championing strategic neutrality amid complex forms of interventions in an arena rife with rivalries and institutional weaknesses (within and among states).

The argument of this chapter unfolds in the following sections: First, the chapter maps patterns in China's political-economic engagements. It then explains how these patterns reinforce regional fragmentation and favour bilateralism, paying attention to the agency of local states in tailoring their reactions to China's policies to avoid framing Red Sea actors as passive recipients or China's policies. The chapter concludes with reflections on three issues: the spill over into the HoA from competitive Gulf politics, regional implications of US-China rivalry, and local civil society and media reactions to China's engagements.

Mapping Engagement: Patterns and Trends

Economic and political dimensions in China's Red Sea engagement are inseparable. Civilian infrastructure and investment projects often possess dual-use capabilities that could be leveraged for military purposes if necessary.⁸⁷ Djibouti serves as one focal point of China's presence in the region, and hosts several Chinese-funded infrastructure projects,

85. Cumulatively, Chinese BRI engagement has reached USD 1.308 trillion since 2013 of which USD 775 billion in construction and USD 533 billion in investments. See: Green Finance & Development Center (Fudan University), China Belt and Road Initiative (BRI) Investment Report 2025 H1, Report (Shanghai: Fudan University, 2025)

86. Ministry of Foreign Affairs of the People's Republic of China, “Remarks by Foreign Ministry Spokesperson Mao Ning,” Belt and Road Portal, 2024.

87. Xiaoqing Diana Lin, Anja Matwijkiw, Bronik Matwijkiw, and Su Yun Woo, “China's ‘Belt and Road Initiative’: A Research Study of a Multifaceted Policy,” in *The Global Community Yearbook of International Law and Jurisprudence* 2020, ed. Giuliana Ziccardi Capaldo (New York: Oxford University Press, 2021), 325–358.

including the Doraleh Multi-Purpose Port and the Djibouti International Free Trade Zone.⁸⁸ These projects have contested benefits: rents and infrastructure contrast with Djibouti's USD1.4 billion debt to China in 2025, which represents more than 70 percent of Djibouti's total external debt and about 37–45 percent of its GDP.⁸⁹ Moreover, establishing the first overseas military base in Djibouti marked a historical shift in China's military posture away from strict non-interventionism. The base is consistently explained to be of a logistics support purpose to facilitate trade and regional stability; it still, however, raises questions on the extent to which China is willing to entrench its foothold in this geostrategic region.⁹⁰

China's projects, in Djibouti and broadly in the Horn, carry geopolitical implications. For example, the Addis Ababa–Djibouti Railway, financed mainly by the Export-Import Bank of China and constructed by Chinese companies, connects Ethiopia's capital to Djibouti's ports. This project offers landlocked Ethiopia access to global markets. Beyond improving infrastructure capacity, however, such projects empower certain states' growing global and regional roles such as Ethiopia and give them additional policy leverage. In other cases, China's investment in Oman's Duqm Special Economic Zone provides not only trade access but also a strategic maritime foothold. Beijing's close ties with all Gulf powers and its capital and/or technical assistance/investments have effectively enabled their own regional or global geopolitical agendas. In Sudan, China's involvement in expanding the telecommunications sector, especially through companies like Huawei and ZTE, raises concerns of digital sovereignty and political influence since these actors provide critical infrastructure for state surveillance.⁹¹ Some even argue that Sudan's current situation is partly the result of selective neutrality by great powers (as China, but also the US), which could have more firmly supported the transitional government.⁹²

In sum, China's economic initiatives cannot be understood in isolation from their political and strategic contexts, and they effectively become part of complex rivalries and thus a form of intervention in regional dynamics.⁹³

Impact on Regional Dynamics

While China's discourses of strategic neutrality often align with regional priorities such as development and connectivity, the underlying structure of its engagement introduces new fault lines and deepens divisions across the Red Sea region.

88. Monty Khanna, "The Shifting Sands of Djibouti," ORF Issue Brief no. 331 (New Delhi: Observer Research Foundation, 2019), 1–8.

89. International Monetary Fund, Middle East and Central Asia Department, Djibouti: 2024 Article IV Consultation – Press Release; Staff Report; and Statement by the Executive Director for Djibouti, IMF Staff Country Report no. 148 (Washington, DC: International Monetary Fund, 2024), 1–71.

90. Somaliland Standard, "Djibouti Has 'No Choice' but China for Infrastructure Development," 29 August 2019; Ministry of National Defense of the People's Republic of China, "Official Announcement on the Opening of the Djibouti Base," News Release, 2019.

91. Amr Salah Mohamed, "China's Growing Maritime Presence in Egypt's Ports and the Suez Canal," Middle East Institute, 3 November 2023.

92. Mehari Taddele Maru, "Sudan's Atrocious Political Transition," UNU-CRIS Working Paper no. 10 (Bruges: United Nations University – Institute on Comparative Regional Integration Studies, 2023).

93. Imad Mansour, "Treading with Caution: China's Multidimensional Interventions in the Gulf Region," *The China Quarterly* 239 (2019): 656–678.

China's approach to the Red Sea is best described as fragmented: it does not constitute one coherent strategy but rather a set of piecemeal engagements that are largely bilateral and vary significantly by country. For example, its engagements with Gulf states (e.g., with UAE, Saudi Arabia) focus on trade (China buying energy) and technology transfer (China sells technology such as with wireless providers), while engagements in HoA (e.g., Djibouti, Ethiopia) emphasize the building of infrastructure logistics projects, especially ports. Chinese investments are less averse to operating in fragile or conflict-affected environments than many other international partners. However, long-term investments are still likely to be constrained by geopolitical risks, especially those associated with strategic planning. Since BRI-related investments are primarily politically driven, there remains potential for aligning policies with China's discourse of Global South solidarity and regional pacifism, but the fragmented approach limits the transformative potential of these investments.

China's strategic neutrality has also deepened regional mistrust among Gulf states and Horn countries, where rivals fear that others may gain advantages through exclusive bilateral agreements with Beijing. Ports across the Horn of Africa, for example, attract simultaneous interest from China, the UAE (e.g., Berbera Port in Somaliland),⁹⁴ and Saudi Arabia (notably in Sudan and Eritrea). While the BRI is not the sole avenue through which such ports acquire global relevance, its connectivity ambitions position China as a key player. Yet Beijing has not sought to organise these emergent interests into a coherent regional framework, instead becoming entangled in competing regional policies.⁹⁵

Beijing's engagement with regional institutions is limited, showing a clear preference for bilateral arrangements. This approach is efficient for China and for local states, as it offers greater control, flexibility, and speed compared to multilateral processes. However, it reinforces fragmentation, particularly given intra-African rivalries. China has made some attempts to incorporate African agendas through the Forum on China-Africa Cooperation and BRI frameworks, integrating references to the African Continental Free Trade Area, the African Development Bank's Program for Infrastructure Development in Africa, and the AU's Agenda 2063. Critics argue that such integration occurs through anchoring African goals within China's national security priorities, which limits the bargaining power and agency of African institutional actors.⁹⁶ A similar pattern appears in relations with the Arab League: While China expresses rhetorical support for the League,⁹⁷ rarely coordinates substantively, relying instead on bilateral forums and declaratory support for "Arab causes." China is not responsible for structural weaknesses in the region nor for achieving pacific relations among its members, but its policy remains in tension with its discourse of solidarity and inclusion.

This reluctance to engage regionally, though tactically effective for Beijing, comes at a cost for the region. It limits coordinated policy responses to transnational challenges, including climate change, migration, refugee flows, persistent rivalries, armed conflicts, and

94. Sankalp Gurjar, "The Port of Berbera and Geopolitics of the Western Indian Ocean," *International Studies* 60, no. 3 (2023): 313–327.

95. Yahia H. Zoubir, "The Gulf and the HoA: Investing in Security," in *The Gulf and the HoA: Crossroads of Influence in the Trans-Red Sea Region*, Conference Proceedings (Doha: Middle East Council on Global Affairs, 2024).

96. Paul Nantulya, "Reimagining African Agency in Africa-China Relations: Lessons from FOCAC 2024," *Africa Center for Strategic Studies*, 7 October 2024.

97. Xinhua, "China's Arab Policy Paper," *The State Council of the People's Republic of China*, 13 January 2016.

infrastructure development—all of which require multilateral cooperation.⁹⁸ Furthermore, bypassing regional frameworks undermines broader contributions to neighbouring development strategies and reinforces the perception among rivals that de-escalation through collective efforts is futile. This outcome is notable because it contradicts China's advocacy for multilateralism within frameworks such as BRICS+.

Any reflection on China's regional engagements should not ignore the agency of local states, which have not only welcomed but actively shaped the contours of Chinese involvement to serve their own interests. Red Sea region states, such as Ethiopia or Saudi Arabia, have not been passive recipients of China's interests, but have actively shaped and negotiated the terms of China's involvement to align with their own domestic and regional interests. China's preference for bilateral relations and strategic neutrality is not solely self-serving; it is also welcomed by local actors seeking freedom from conditionalities associated with external oversight. In a context of weak and fragmented regional institutions—often encompassing states with incompatible interests—many governments view China's flexible bilateralism as an opportunity to maximise leverage.⁹⁹ In other words, promoting regional collaboration is not merely a function of external initiatives but is contingent on the political will and institutional capacity of member states to cooperate with their neighbours.¹⁰⁰ Ethiopia's collaboration with China on projects such as the Addis-Djibouti railway and industrial park development illustrates a deliberate choice to bypass regional planning structures in favour of direct, state-to-state arrangements. Similarly, Sudan and Eritrea have sought Chinese investment in port and energy infrastructure outside of African Union frameworks. These cases exemplify how, in the absence of robust regional institutions, local actors strategically instrumentalize China's strategic neutrality to advance national interests.

Reflections and Outlook

The greater Red Sea arena will be a critical node in China's 21st-century geopolitics as it links its Indian Ocean interests and its ambitions in Europe, Africa, and the Middle East. Strategic neutrality is increasingly stress-tested by the contradictions and tensions emerging from dissonance between discourses and practices. Strategic neutrality is likely to face increasing pressures from three sets of challenges.

First, the spillover of competitive Gulf politics into the HoA creates a volatile and fragmented operating environment for external powers, including China, by injecting fluid allegiances and militarization into the region. In a very fluid scene, reports paint a picture of axes forming with the UAE, Ethiopia and Sudan's Rapid Support Forces on one hand, and Saudi Arabia joined by Egypt, Eritrea, and the Sudanese Armed Forces

98. Oscar Otele and Otiato Guguyu, "Region-Centric Infrastructure Policies and the Regional Politics Surrounding Chinese Railway Projects: Insights from the East Africa Region," *Politics & Policy* 51, no. 5 (2023): 919–935.

99. Aschale Abie Dubale, "The Geopolitics of the HoA: Navigating Regional Conflicts and Global Interests," *International and Public Affairs* 8, no. 2 (2024): 27–31.

100. Mohamed Farah Hersi and Adeoye O. Akinola, *IGAD and Multilateral Security in the HoA: Through the Lens of the Somali Conflict* (Cham: Springer, 2024).

on the other.¹⁰¹ Clashes over port development and the Red Sea corridor will complicate China's infrastructure diplomacy, particularly if Chinese investments rely on stable long-term access to logistics hubs or ports influenced by rival Gulf actors.

Second, the US military reinforcement in the Red Sea arena, particularly in Djibouti, Somalia, and the Gulf of Aden, reflects Washington's strategic concern with China's growing presence. However, China is not displacing the US in a zero-sum manner; rather, China's disengagement from collective security action and its focus on bilateral (largely economic) engagement, leaves much of the security provision to the US. So far, both powers are operating in parallel, with overlapping but not identical priorities: the US focuses on counterterrorism, military dominance, and alliance maintenance, while China emphasizes economic access, political non-alignment, and commercial logistics. This so-far non-confrontational strategic duality in the region will be tested as the greater Red Sea arena will increasingly become a geopolitical fault line for the heating China-US rivalry.

Third, China's momentum in the arena is increasingly matched by local scrutiny and backlash. Despite substantial investment, China is being framed by local civil society and opposition actors as a debt trap enabler, an exploitative employer (e.g., poor labour conditions, imported workers), and an elite-aligned actor fuelling corruption or opaque governance. This weakens China's professed Global South solidarity principled position, and likely faces Beijing with substantial local criticism. To be sure, any external player working through such fractured local dynamics will face criticism. Here, China's own discourse of global reform augments regional expectations and hence frustrations.

101. Mehari Taddele Maru, "Beyond the 'Race to the Bottom,'" UNU-CRIS Working Paper no. 11 (Bruges: United Nations University – Institute on Comparative Regional Integration Studies, 2023).

Chapter 6

Türkiye's Red Sea Policy and the Case of Somalia: A Strategic Instance of Inter-Coastal Engagement

By Kaan Devecioglu

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Türkiye's Red Sea Policy and the Case of Somalia: A Strategic Instance of Inter-Coastal Engagement

Türkiye's growing interest in the Red Sea region represents a multidimensional orientation that transcends a superficial regional outreach; it is grounded in historical depth, doctrinal continuity, and strategic rationale. During the Ottoman era, naval policies developed in the Red Sea from the 16th century onwards were not only aimed at protecting the Hejaz, but also reflected a broader strategy of maintaining balance in Indian Ocean trade routes. While this historical legacy remained dormant throughout much of the Republican era, it has resurfaced as an institutional and strategic reference point in the post-2000 period under the "Africa Opening" and the subsequent "Africa Partnership Policy".¹⁰² Türkiye's foreign policy approach, based on the construction of transoceanic capacity, has thus been redefined in this new era to align not only with historical missions but also with contemporary security and development imperatives.

At the heart of this transformation lies the "Blue Homeland" (*Mavi Vatan*) doctrine,¹⁰³ a sovereignty-based maritime vision originally conceived for the Eastern Mediterranean and the Aegean Sea, which has since expanded to encompass the Red Sea, the Gulf of Aden, and the Indian Ocean. In its expanded interpretation, the doctrine integrates several dimensions, such as maritime security, energy diplomacy, port management, maritime trade corridors, and the governance of marine natural resources. Türkiye's investments in naval capabilities, overseas base initiatives, and diplomatic engagements constitute tangible manifestations of this doctrine in the field. In this regard, Türkiye has begun to move beyond the classical land-centric security paradigm, positioning itself as a maritime power shaped by multilateral cooperation and regional stability efforts in coordination with littoral states.

One of the most visible examples of Türkiye's multidimensional strategy in the Red Sea region is its engagement in Somalia. The multilayered interactions conducted in areas such as security, energy, economy, diplomacy,¹⁰⁴ and cultural influence have rendered Somalia not merely a subject of bilateral relations, but a central component of Türkiye's Red Sea security architecture and broader African policy. This chapter offers an assessment of Türkiye's Red Sea strategy, tracing its historical foundations and contemporary doctrinal frameworks. It examines how the strategy has evolved, deepened, and expanded its regional influence—illustrated through the case of Somalia—and evaluates its broader implications for the Red Sea region.

102. "Speech at the 5th Türkiye–Africa Business and Economic Forum", Presidency of the Republic of Türkiye (TCCB), 17 October 2025.

103. Cihat Yaycı, *Blue Homeland: A Book of a Map and a Doctrine*, Istanbul University Press, 2022.

104. "Ethiopia–Somalia Ankara Declaration under facilitation of the Republic of Türkiye", The Republic of Türkiye Directorate of Communications, 12 December 2024.

Türkiye's Multidimensional Engagement in the Red Sea

Türkiye's engagement in the Red Sea is shaped by dynamics of both cooperation and competition with Gulf states. Its strategic partnership with Qatar has laid the groundwork for strong military and economic cooperation, establishing Doha as Türkiye's closest ally in the Gulf region. In contrast, relations with the UAE and Saudi Arabia were marked by cautious pragmatism, particularly during the post-2011 Arab Uprisings, which revealed significant political divergences. However, since 2021, Türkiye has normalized ties with Riyadh and Abu Dhabi.¹⁰⁵ This shift has been reflected in various domains, including logistics infrastructure, port management, and investment competition in countries such as Sudan and Somalia. Türkiye's joint security initiatives in Somalia (TURKSOM) with Qatar (Tarık ibn Ziyad Military Base) can be seen as a balancing effort against the influence exerted by the UAE and Saudi Arabia in Ethiopia and Sudan respectively. In this sense, Türkiye's relations with Gulf actors have evolved beyond a zero-sum rivalry and toward a more complex, layered diplomacy.

Türkiye's diplomatic and security interactions with Red Sea littoral African states represent an attempt to anchor its overseas engagement capacity within an Africa-centred framework. High-level engagements with Djibouti, Ethiopia, Somalia, and Sudan have reinforced Türkiye's growing influence in areas such as port development, military bases, and maritime security. Although the development project on Sudan's Suakin Island has seen limited progress due to the outbreak of war, it still signifies Türkiye's enduring maritime geopolitical aspirations in the region.¹⁰⁶ Accordingly, Türkiye is fostering closer ties with western Red Sea coastal states such as Sudan, Djibouti, and Somalia while simultaneously developing balancing relations with eastern coastal actors like Yemen and Saudi Arabia.¹⁰⁷ This strategy aims to ensure inter-coastal equilibrium and reposition Türkiye's maritime power not only along Africa's shores but also along the Arabian Peninsula. Thus, Türkiye's Red Sea strategy can be seen as a hybrid approach, integrating bilateral relations with littoral states into a broader framework of multilateral security cooperation and energy-geopolitical connectivity.

Somalia: A Central Case in Türkiye's Red Sea Strategy

Somalia has long been one of the geopolitical fault lines of the Horn of Africa due to its fragile state structure, strategic coastline, and central position in global power competition. In this context, Türkiye's policy toward Somalia not only strengthens bilateral relations but also serves as a multifaceted engagement model that contributes to regional security architecture. Türkiye's multilayered presence in Somalia functions as more than a conventional model of military basing; it serves as a strategic reference point for redefining a state's maritime security, energy access, economic projection, and diplomatic positioning

105. İsmail Numan Telci and Gökhan Erel, *Transforming Türkiye-Gulf Relations: Crises, Opportunities and Expectations*, Ortadoğu Yayınları, 2022, pp. 137–138; Mehmet Rakipoğlu, "Saudi Arabia", *Middle East Annual 2020*, Ortadoğu Yayınları, Vol. 16, pp. 142–147.

106. "Türkiye's Ambassador to Khartoum Visited the City of Suakin", [Haberler.com](https://haberler.com), 10 December 2023.

107. Marwa Maziad, "The Turkey-Qatar Alliance: Through the Gulf and into the HoA", in *The Gulf States and the HoA*, Manchester University Press, 2022, pp. 127–150.

in an integrated manner. This engagement is not merely a military reflection of regional competition, but a hybrid foreign policy practice where state-building, energy diplomacy, multilateral facilitation, and cultural influence converge. Within this framework, Türkiye has transformed the infrastructure it has built in Somalia into a core component of the Red Sea's security and geoeconomic architecture, thereby asserting itself as a lasting actor in the region's shifting balance of power.

Engagement in the Fields of Military and Economic Security

Turkey–Somalia defence cooperation began in the early 2010s, primarily through military training and the restructuring of Somali security institutions. The signing of the ten-year Defence and Economic Cooperation Framework Agreement in 2024 marked a significant qualitative and quantitative leap in this partnership. The agreement expands Türkiye's role in training and equipping the Somali National Armed Forces and aims to strengthen the country's capacity, particularly in maritime and coastal security.¹⁰⁸ Türkiye's Military Training Base in Somalia (TURKSOM), inaugurated in 2017, is not just a capacity-building mechanism but the institutional foundation of Türkiye's direct involvement in the Red Sea security architecture. Through this base, Türkiye contributes to the reconstruction of Somali state authority by training elite segments of the Somali Armed Forces, while also securing a long-term presence as a legitimate security actor on the ground.¹⁰⁹ The new defence cooperation agreements signed in 2024 and 2025 extended this engagement beyond capacity-building by introducing provisions for Turkish military deployment to safeguard Somalia's offshore hydrocarbon resources.

Türkiye's economic and energy-based presence in Somalia extends beyond bilateral relations and constitutes part of a broader geoeconomic vision shaped by energy security and maritime trade dynamics in the Red Sea basin. In line with the "Energy and Security Framework Agreement" signed in 2024, the Turkish Petroleum Corporation (TPC) initiated natural gas and oil exploration activities in three designated offshore blocks within Somalia's maritime jurisdiction.¹¹⁰ These operations, supported on-site by the Oruç Reis vessel and its auxiliary ships, established a direct link between energy exploration and maritime security. The operation of Mogadishu Port by the Turkish company Albayrak, along with increased investment in port infrastructure, complements this energy-driven initiative by enhancing Somalia's integration into regional trade chains. Through these developments, Türkiye has strengthened not only Somalia's coastal infrastructure but also the broader logistics and transport network of East Africa, facilitating inland access from coastal gateways. The interconnectedness between energy security, coastal protection, and port investment shows that Türkiye's economic engagement in Somalia should be understood not merely as development assistance, but as geostrategic positioning rooted in maritime trade and energy diplomacy.

108. "Turkish Parliament Approves 2-Year Military Deployment in Somalia", Anadolu Agency, 22 July 2024; "Turkey Said to Supply Somalia's Military with Combat Helicopters", Bloomberg, 6 June 2025; "Somalia Sacks Defence Minister amid US Pressure over His Turkey Ties", Middle East Eye, 18 March 2024.

109. Mohammad Abdelrahman Banisalamah and Mariam Ibrahim Al-Hamadi, "The New Turkey: The Spread of Turkish Military Bases Abroad, Role and Indications 2002–2020", *Dirasat: Human and Social Sciences*, Vol. 50, No. 2, 2023, pp. 553–568.

110. Ibidem.

Türkiye is contributing not only to counterterrorism efforts against al-Shabaab but also to Somalia's broader state-building process through military advising, equipment support, and institutional development. Türkiye's identity in the Red Sea is therefore defined not only by the protection of maritime routes, but by its contribution to the internal stability of coastal states.

Mediation and Diplomatic Initiatives

Türkiye's mediation efforts in response to the maritime access crisis between Ethiopia and Somalia, which began in early 2024, have positioned Ankara not only as a military or economic actor but also as a regional diplomatic balancer.¹¹¹ Ethiopia's signing of a MoU with Somaliland on January 1, 2024,¹¹² granting port and military base rights, was widely perceived by Mogadishu as a direct affront to Somali sovereignty. This development not only triggered bilateral tensions but also introduced a new fault line within the broader Red Sea security architecture.

Following Türkiye's diplomatic intervention, a series of three negotiation rounds were convened in Ankara, beginning on July 2, 2024, and culminating in December 2024 with the issuance of the "Ankara Declaration." These talks produced a diplomatic framework that reaffirmed both parties' adherence to international law and committed them to constructive engagement. Türkiye's approach in this process can best be described as facilitative diplomacy, which differs from traditional mediation by focusing on rebuilding trust between the parties, keeping channels of dialogue open, and safeguarding normative frameworks. In this context, Türkiye adopted a legitimacy-based stance by upholding Somalia's territorial integrity, while also crafting a diplomatic language that maintained its balanced relations with a key African actor, Ethiopia.¹¹³ As a result, Türkiye reinforced its diplomatic agency in the Red Sea through a careful balance of principled support and pragmatic engagement. With the adoption of the Ankara Declaration, the process has entered a new phase centred on technical issues, signifying that Türkiye's facilitation mission has been fulfilled and that the path forward will now be shaped by the efforts and negotiations of the parties themselves.

The dialogue process between Somalia and Somaliland, mediated by Türkiye, began in 2013 with the "Ankara Conference," which has since become a landmark in the history of the talks. Hosted by the Turkish Ministry of Foreign Affairs, the conference brought together then-Somali President Hassan Sheikh Mohamud and Somaliland President Ahmed Mohamed Silanyo. The meeting concluded with the signing of the "Ankara Communiqué," in which both sides agreed to rebuild mutual trust and continue regular

111. Kaan Devecioğlu and Tunç Demirtaş, "Opinion: Turkey Showcases Growing Mediation Role through Ethiopia-Somalia Talks", *The Africa Report*, 12 July 2024.

112. Esra Tekin, "Türkiye Voices Concern over Agreement between Ethiopia and Somalia's Breakaway Region", *Anadolu Agency*, 4 January 2024.

113. "Ethiopia-Somalia Ankara Declaration under Facilitation of the Republic of Türkiye", Presidency of the Republic of Türkiye Directorate of Communications, 12 December 2024.

dialogue meetings.¹¹⁴ Following this, the Istanbul II Conference was held in 2014, where the establishment of technical committees and the continuation of direct contacts were agreed upon.¹¹⁵ However, after 2015, Türkiye's facilitation efforts slowed down as the deepening trust crisis between the parties hindered sustained dialogue.

In 2019, 2020, and 2023, Djibouti and Kenya launched new mediation attempts to revive the process¹¹⁶, with Türkiye maintaining its supportive role as a "facilitating country." In subsequent years, Ankara continued consultations with representatives from Mogadishu and Hargeisa, yet no tangible political outcome was achieved due to Somaliland's insistence on independence and Somalia's emphasis on territorial integrity. Nevertheless, the conferences initiated by Türkiye established a regional framework for dialogue and remain regarded today as the most comprehensive and structured effort to resolve the Somalia–Somaliland dispute.

Cultural and Humanitarian Diplomacy

Türkiye's presence in Somalia is not limited to military and economic instruments; it is equally rooted in soft power strategies, which have turned Türkiye into a legitimacy-producing, community-engaged actor. Since 2011, the Turkish Cooperation and Coordination Agency (TİKA) has implemented infrastructure development projects, particularly in healthcare, education, and water access, which have built sustainable public trust.¹¹⁷ Cultural programs and Turkish language courses offered by the Yunus Emre Institute (YEE) have created avenues for cultural proximity, while the Turkish Maarif Foundation's institutionalization of education has deepened ties with Somalia's emerging elite.¹¹⁸ Furthermore, the growing number of Somali students studying in Türkiye under the Türkiye Scholarships program is fostering long-term societal bonds and strengthening Türkiye's public diplomacy capacity.¹¹⁹ According to the Presidency for Turks Abroad and Related Communities (YTB), a total of 1,277 Somali students have been awarded scholarships through the Türkiye Scholarships program. Additionally, the launch of Turkish Airlines' Istanbul–Mogadishu flights following President Erdoğan's visit to Mogadishu in 2011 marked a significant step in opening Somalia to the world, and these flights now operate daily.

When combined with security and economic engagement, this soft power strategy situates Türkiye's role in Somalia not as a short-term, interest-driven actor, but as a multidimensional partner grounded in mutual societal benefit. Türkiye's cultural and humanitarian diplomacy efforts, therefore, not only cultivate the image of a "helping nation," but also function as a geopolitical tool for institutionalizing Türkiye's identity as a "reliable partner" in the Red Sea.

114. "Historic Somalia Summit in Ankara. Presidents of Somalia and Somaliland Met in Ankara", Republic of Türkiye Ministry of Foreign Affairs, 13 April 2013.

115. "No: 22, 20 January 2014, Press Release Regarding the Third Round of Negotiations between Somalia and Somaliland", Republic of Türkiye Ministry of Foreign Affairs, 20 January 2014.

116. "Historic Dialogue Initiated between Somalia and Somaliland with Djibouti as Mediator", Somali National News Agency (SONNA), 30 December 2023.

117. For more information: <https://tika.gov.tr/en/press-room/publications/turkish-development-assistance-reports/>

118. Kaan Devecioğlu, "Türkiye's Vision for Africa: Humanitarian Diplomacy and Development Cooperation", Insight Turkey, Vol. 26, No. 3, 2024, pp. 131–154.

119. For more information: <https://www.turkiyeburslari.gov.tr/>

Is Türkiye an Inter-Coastal Mediator or a Strategic Balancer?

Türkiye's approach to the Red Sea is not grounded in a classical strategy of power projection but rather built around a framework of facilitator diplomacy. While elements such as the TURKSOM Military Training Base, the operation of Mogadishu Port, and the military presence for protecting hydrocarbon activities might suggest capacity projection, Türkiye generally employs these instruments not as tools of unilateral pressure, but as mechanisms to reinforce diplomatic influence based on mutual interdependence. Türkiye's role in the Ethiopia–Somalia crisis serves as a notable example of this framework. During the process, Ankara refrained from forcefully defending the sovereignty claims of either party and instead adopted a foreign policy line focused on fostering minimum dialogue and promoting compromise over confrontation.¹²⁰ Türkiye has sought to expand its presence on the ground while simultaneously constructing its diplomatic legitimacy through its facilitator identity—marking a significant departure from the traditional strategies employed by major powers.

At a time when the Red Sea basin is undergoing increasing militarization, Türkiye's positioning does not fall neatly into revisionist or status quo categories. In contrast to the permanent military bases established by the United States, France, China, and Gulf countries along the shores of Djibouti, Eritrea, and Yemen, Türkiye's security architecture in the region is primarily shaped by coordination with regional actors and the transfer of institutional capacity. For example, through the TURKSOM military training base it established in Somalia, Türkiye provides training to Somali soldiers and contributes to the country's fight against terrorism. This positions Türkiye as a “semi-militarized balancing actor”, one that maintains a military presence but does not convert it into hard power. Türkiye's military presence in Somalia primarily focuses on supporting stability along the Red Sea maritime corridor and promoting the continuity of sea trade. In this context, Türkiye plays a role in enhancing regional security cooperation and contributing to the development of a more inclusive security framework.

A conceptualization based on the Somali case suggests that Türkiye should not be seen as a “third-party actor” in the competitive dynamics of the Red Sea, but rather as a strategic bridge between coasts. Türkiye's engagement is neither limited to the African shores nor exclusively focused on the Arabian Peninsula; on the contrary, it is one of the few actors actively working to establish political, economic, and security linkages between these two coasts. Its activities in Somalia, ranging from energy and infrastructure development to military training and humanitarian aid, not only contribute to Somalia's stabilization and development but also serve as diplomatic leverage in Türkiye's broader relations with other littoral states such as Sudan, Eritrea, Djibouti, Yemen, and even Saudi Arabia.

120. “Ethiopia–Somalia Ankara Declaration under Facilitation of the Republic of Türkiye”, The Republic of Türkiye Directorate of Communications, 12 December 2024.

Outlook and Conclusion

Türkiye's foreign policy approach toward the Red Sea has evolved over the past two decades into a comprehensive vision blending historical memory with strategic foresight. Somalia is not merely a partner country; it serves as a strategic pilot case through which Türkiye has tested its overseas engagement capacity, coordinated multilayered foreign policy instruments, and materialized its identity as an emerging maritime power. Türkiye's involvement in Somalia should therefore be viewed not as a by-product of its Red Sea policy, but as a foundational pillar.

The military base established by Türkiye in Somalia, its cooperation on maritime jurisdiction, energy exploration activities, port investments, and diplomatic mediation efforts function not only as components of bilateral relations but also as a litmus test for Türkiye's ability to establish cross-littoral strategic equilibrium. Its facilitative diplomacy during the Ethiopia–Somalia maritime access crisis and its hydrocarbon activities in Somali waters reveal that Türkiye aims to contribute to Red Sea security and stability through a multidimensional, long-term approach.

Türkiye has begun to extend the strategic engagement model developed through Somalia to other littoral states such as Djibouti, Sudan, and Eritrea. Its outreach to actors on the Arabian Peninsula has enabled this model to mature into a form of cross-littoral diplomatic capacity. Türkiye's approach, neither fully revisionist nor strictly status quo-oriented, signals an attempt to construct a balancing architecture that offers an alternative to both Western great-power militarization and Gulf economic expansionism.

In conclusion, the Somali case represents the initial testing ground for a new generation of Turkish foreign policy that contributes to peace, energy security, and stability in the Red Sea. This model encompasses a broad spectrum of policies, ranging from security and diplomacy to development and soft power, and reflects Türkiye's distinctive contribution to the evolving multilateral maritime order. In the coming period, a deepening of Türkiye's cross-littoral diplomacy capacity will likely consolidate its role not only in the Red Sea but across the Indian Ocean and East Africa as a stabilizing and balancing actor. In this sense, Türkiye's Somalia policy constitutes one of the foundational components of a foreign policy paradigm that has transformed from a regional engagement into a global strategic vision.

Chapter 7

Balancing the Red Sea: Egypt's Strategy in a Crowded Field

By Ahmed Morsy and Mostafa Mandour

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Balancing the Red Sea: Egypt's Strategy in a Crowded Field

The Red Sea represents a vital geopolitical and economic extension to Egypt's national security, given its direct connection to the only source of fresh water, the Nile River, and feeds a critical artery for trade. However, recently Egypt has shown signs of an interest in undertaking strategic repositioning" or "is showing signs of a strategic repositioning. This is reflected in security agreements with Somalia, the exchange of high-level official visits and meetings with several states, the launch of direct flights to Djibouti and Mogadishu, and an expanding presence through infrastructure and trade agreements with Kenya, Uganda and South Sudan among others.

The Egyptian repositioning comes amid perceived threats, from the stalled negotiations on the GERD, Ethiopia's agreement with Somaliland over a sovereign seaport and military base,¹²¹ the expanding role of extremist and violent groups like al-Shabab and the Islamic State, and growing presence and competition between regional players as well as international actors.

Against this backdrop, this chapter aims to answer these questions: What are the pillars driving Egypt's position in the HoA? Can Egypt move from a marginal player into a regional balancing actor? And how can it ensure that this new engagement is the beginning of a long-term strategy, rather than merely a response to temporary crises? Answering these questions, this chapter argues that Egypt's policies are driven by three factors: escalating threats to Egypt's water and maritime security and the economic impacts from the Bab-el-Mandeb disruptions; The growing regional security concerns especially with the ongoing war in Sudan and endemic weaknesses in Somalia; and a desire to balance the influence of other geopolitical rivals like the UAE, Ethiopia and Türkiye. To this end, Egypt is deploying a multi-faceted strategy involving security agreements, diplomatic engagement, economic initiatives, and cultural tools to reassert its historical relations, and establish itself as a possible balancer in the volatile Red Sea region.

However, the sustainability and effectiveness of Egypt's approach face several obstacles, most notably modest financial and economic resources compared to actors such as the UAE, Türkiye or China, as well as the absence of a comprehensive long-term strategy, and the reliance on reactive measures.

To develop this analysis, this chapter first looks at how Egypt projects itself in the Red Sea region by highlighting its interests and the different approaches deployed to reconnect with the region. Thereafter, the chapter offers a succinct section on activities by competing regional actors and the limitations of Egypt's approach, to then conclude with a summary and overall assessment of Egypt's strategies ahead.

121. Kalkidan Yibeltal, "Ethiopia Signs Agreement with Somaliland Paving Way to Sea Access," BBC News, 2 January 2024.

Egypt in the Red Sea: Interests, Tools and Actions

The current Egyptian approach to the Red Sea region is based on several intertwined strategic motives and threats. The first is water security, which is threatened by the conclusion of the GERD and the possibility of building other dams, posing existential risks to Egypt's share of the Nile waters.¹²² Egypt depends on the Nile for over 90 percent of its freshwater use. Since 1954, it has received about 55 billion cubic meters annually, which leaves the country at a deficit since it needs about 90 billion cubic meters to cover its growing needs. In addition, the Entebbe Agreement, which redefined the principles of 'equitable use' without recognizing Egypt's historical rights, is also critical to this issue.¹²³ This leaves Egypt vulnerable to changes in upstream countries, rapid climate change and its population growth.

Maritime security and navigation of international waters are another critical driver for Egypt, given the importance of the Suez Canal as a strategic corridor for international trade, and its revenue as a pillar of foreign currency to the Egyptian economy, with revenues stemming from the canal estimated at USD61 billion over the past 10 years.¹²⁴ The canal witnessed a sharp decline in shipping traffic at the end of 2024 due to continued regional tensions originated by the Houthis' attacks, the conflict in Yemen and Palestine, and the surge in piracy, reinforcing the importance of protecting navigation in and across the Red Sea.¹²⁵

Traditional and conventional security threats is another challenge for Egypt, particularly through its southern borders, which reinforces the need for preventive engagement to mitigate the security threats. Most notably are the activities of armed actors such as al-Shabab and Islamic State in Somalia, and the Houthis in Yemen, with reports of nascent cooperation among these actors across the strait.¹²⁶ The prevalence of illicit activities among these actors further destabilizes the already weak governing systems in the region, increases migration and displacement, and turns young men into mercenaries as illustrated recently by the case of Yemen.¹²⁷ Moreover, the ongoing war in Sudan poses additional security threats and socio-economic challenges to the already ailing Egyptian economy. Since the war started in April 2023, Egypt estimates receiving over 1.5 million Sudanese, but recent economic hardships and restrictions by the Egyptian government are pushing Sudanese to dangerous routes through Libya and across the Mediterranean to Europe.¹²⁸

122. Ahmed Morsy and Tsedenya Girmay, "With Ethiopia's GERD Active, Tensions Mount Along the Nile," Afkar Blog, Middle East Council on Global Affairs, 25 September 2025; Dawit Endeshaw, "Ethiopia Opens Africa's Largest Hydroelectric Dam to Egyptian Protest," Reuters, 9 September 2025.

123. The Cooperative Framework Agreement (CFA), also known as The Entebbe Agreement, where it was signed in 2010, is an attempt by Nile Basin countries to establish a treaty that rather than quantifying 'equitable rights' or water use allocations, it intends to establish a framework to "promote integrated management, sustainable development, and harmonious utilization of the water resources of the Basin, as well as their conservation and protection for the benefit of present and future generations.

124. Asharq Bloomberg, "Egypt Earns USD 61 Billion in Revenues from the Suez Canal over Ten Years," Asharq Business, 3 May 2025.

125. Fatma Khaled, "Egypt's Revenue from the Suez Canal Plunged Sharply in 2024," Associated Press, 17 April 2025.

126. Ibrahim Jalal and Adnan al-Jabarni, Dhows, Drones, and Dollars: Ansar Allah's Expansion into Somalia (Beirut: Carnegie Middle East Center, 14 March 2025); Samar Khader, "A Pact Between al-Shabab and the Houthis Threatens Red Sea Shipping," New Lines Magazine, 1 July 2025.

127. Ahmed Morsy and Faozi Al-Goidi, *The Wages of War: Yemeni Gunmen for Hire* (Doha: Middle East Council on Global Affairs, April 2025).

128. Amina Ismail, Nafisa Eltahir, and Renee Maltezou, "Egypt's Crackdown Drives Sudanese Refugees on New Route to Libya and Beyond," Reuters, 11 June 2025.

Finally, Egypt seeks to strengthen its economic presence in the region by investing in infrastructure and energy projects and expanding bilateral and multilateral commercial and financial activities. This serves dual purposes, opening new markets for goods and services and building geopolitical clout and relevance in light of the active roles of Ethiopia, Türkiye and the UAE in the HoA. In sum, these intertwined motives reinforce each other, while also challenging Egypt to act more steadily and strategically.

What Tools are Egypt Deploying?

As part of its efforts to reposition itself as a balancing actor in the Red Sea region, Egypt has adopted a multifaceted foreign policy based on security, diplomatic, economic, and cultural tools. The impetus for this approach is directly linked to a lack of resolution on the GERD, the fallout between Ethiopia and Eritrea after the end of the Tigray war in 2022, and to Ethiopia's MoU with Somaliland. The latter would have broader implications for the HoA and Somalia if enforced.

On the security and military front, Egypt and Somalia signed an agreement in August 2024, and immediately two Egyptian military planes with armaments arrived in Mogadishu,¹²⁹ followed by a warship with additional military equipment.¹³⁰ Cairo officially joined the African Union Support and Stabilization Mission in Somalia (AUSSOM), with 1,091 soldiers, marking the first field participation in Somalia since the 1970s.¹³¹ In addition, in April 2025, Egypt took over the leadership of the multinational naval force tasked with securing the Red Sea and Gulf of Aden, as part of a US initiative aimed at protecting shipping lanes from Houthi threats. This gives Cairo an opportunity to influence positions and security decisions in a critical maritime strait.

Diplomatically, Egypt continued its positive engagement and coordination with Somalia, Eritrea, and Djibouti, which gained momentum after the Ethiopian MoU with Somaliland. Cairo announced the reopening of its embassy in Mogadishu, which previously operated from Nairobi, and the launching of an EgyptAir flight to Somalia via Djibouti.¹³² The coordination resulted in a tripartite summit in Asmara in October 2024, bringing together the leaders of Egypt, Somalia, and Eritrea. This summit resulted in the establishment of a closer tripartite coordination aimed at containing Ethiopian expansion and rebalancing influence in the Red Sea and the HoA. Egypt also coordinated with Djibouti to support the election of its former foreign minister Mahamoud Ali Youssouf, to lead the African Union Commission.¹³³

Simultaneously, Egypt worked to develop and facilitate economic and trade relations and expand its infrastructure and development support across the region. It reflects an expanded vision, despite being modest in comparison to others, aimed at reconnecting

129. Abdi Sheikh and Giulia Paravicini, "Egypt Sends Arms to Somalia Following Security Deal, Sources Say," Reuters, 29 August 2024.

130. Will Ross and Damian Zane, "Egyptian Ship Delivers Weapons to Somalia," BBC News, 24 September 2024; Mostafa Mandour, "Egypt, Ethiopia and Somalia: Can Agreements Silence the Guns?" Alternative Policy Solutions, The American University in Cairo, 25 September 2024.

131. African Union Support and Stabilization Mission in Somalia: <https://au-ssom.org/>

132. Ahram Online, "Egyptian Ministers Join First Flights to Djibouti and Mogadishu from Cairo," 12 July 2024

133. Samuel Getachew and Rodney Muhumuza, "African Leaders Elect Djibouti's Foreign Minister as New Leader of the African Union Commission," Associated Press, 15 February 2025.

Cairo to several key HoA countries. For instance, Egypt received approvals to open Banque Misr branches in Mogadishu and announced the transformation of the CIB-Kenya branch into a strategic hub on the continent.¹³⁴

Building on the enhanced diplomatic relations, Egypt signed numerous memoranda of understanding with Djibouti in the fields of transportation, energy, and development.¹³⁵ These efforts followed the signing of a strategic partnership with Somalia and Kenya in January 2025.¹³⁶

While relations with South Sudan were briefly strained after its ratification of the Nile Basin Agreement, Egypt welcomed a high-level delegation from Juba in January 2025, to discuss official and development cooperation issues. Meanwhile, Egypt opened a medical centre and supported multiple water projects in South Sudan, reflecting a strategy to expand its influence through engagement and developmental projects.

Finally, Egypt did not neglect soft power tools, through increasing scholarship programs for students from the HoA countries and expanding the activities of Al-Azhar and educational and cultural institutions in Somalia and Djibouti, to reaffirm historical ties with the peoples of the region.

The Frantic and Overlapping Race for the Red Sea region

The Red Sea region is witnessing a frantic race to reshape the balance of influence between regional and international powers, amid escalating tensions within the region and their spillover across its borders and the Red Sea. Djibouti is a telling example of this competition, as it hosts several foreign military bases, including American, Chinese, and French, adding a highly complex international dimension to regional interactions.

The most prominent manifestation of this overlap is the intersection of interests between Ethiopia, the UAE, and Türkiye in the Horn and Somalia in particular. For Egypt, while the relationship with Türkiye is characterized by a renewed level of coordination on several issues—despite divergent positions on Ethiopia—the UAE's presence in ports and areas of influence in Somalia and Sudan raises questions about the degree of strategic coordination with Cairo.¹³⁷

The signing of the MoU between Ethiopia and Somaliland is just one of several examples whereby sovereign states are engaging directly the de facto autonomous regions of Somaliland and Puntland. Both territories have a longstanding relationship around infrastructure projects and security engagement with the UAE, independent of the federal government in Mogadishu. Most notably, Dubai Ports operates both naval ports

134. "Banque Misr Obtains License to Operate in Somalia," Daily News Egypt, 5 July 2022; "CIB Egypt Fully Acquires Mayfair CIB in Kenya," African Markets, 30 January 2023.

135. "Joint Statement by the Arab Republic of Egypt and the Republic of Djibouti," The Egyptian Presidency, 23 April 2025.

136. "Joint Political Declaration to Elevate Relations between Egypt and Somalia to Strategic Partnership," The Egyptian Presidency, 23 January 2025; "Egypt and Kenya Elevate Relations to Strategic Partnership," Egyptian Gazette, 29 January 2025.

137. Ahmed Morsy. Egypt and Türkiye: A Pragmatic Turn? Middle East Council on Global Affairs, May 15, 2025; Wedali Chibelushi and Kalkidan Yibeltal. Sudan cuts ties with UAE over alleged paramilitary support. BBC. May 7, 2025.

in Berbera and Bosaso, among many others across the continent.¹³⁸ Recent news reports proposed transferring Palestinians from Gaza to several African countries, including to Somaliland.¹³⁹ While this move is unlikely at the moment, it reflects the UAE influence and the geopolitical overlap that goes beyond the HoA regional dynamics.

The intersection and deepening of economic and military support between Ethiopia and the UAE is viewed with unease in Egypt, which perceives it as an attempt to encircle its vital sphere in the HoA.¹⁴⁰ This is particularly critical as Abu Dhabi played a decisive role in tipping the balance in favor of the Addis Ababa forces in the Tigray war.¹⁴¹ The UAE's presence extends well beyond the Horn of Africa, as it has emerged as the continent's leading investor, consolidating its role across Africa in ways that surpass traditional security cooperation.¹⁴²

The growing Emirati role raises concerns beyond Egypt as it directly competes with Turkish presence and investments. Ankara has been investing steadily in relationships with African states across multiple sectors and using different tools as paths for influence.¹⁴³ Türkiye leveraged its relationship with Ethiopia and Somalia to reduce tensions and reconcile their differences over the Somaliland MoU.¹⁴⁴ But since then, it is not clear where do the two neighbours stand especially with Somaliland recently offering the United States a military base and minerals deal in exchange for recognizing its independence.¹⁴⁵

Conclusion

The rapid transformations in the Red Sea challenge the abilities of the Egyptian approach and its sustainability in a highly volatile environment. Egypt's strategic repositioning in the region is a belated effort to regain presence in a region that has long been an extension of its vital national security. As such, to maintain the apparent momentum, Egypt must shift from ad hoc approaches and reactionary decisions to a long-term flexible strategy capable of addressing and engaging with the region's complexities and intertwined interests.

The Egyptian growing engagement in the HoA remains constrained by several structural limitations. Egypt above all has limited financial resources, given the state's focus on domestic mega infrastructural projects and mitigating the socio-economic impacts of its policies. This cannot be separated from other economic and political knock-on effects from the COVID-19 pandemic, the wars in Ukraine and Palestine, and uncertainties gripping the world economy from Donald Trump's erratic decisions.

138. Rohan Advani. *Constructing Commercial Empire: The United Arab Emirates in the Red Sea and the Horn*. The Century Foundation. December 9, 2019.

139. Josef Federman, Matthew Lee and Samy Magdy. *US and Israel look to Africa for moving Palestinians uprooted from Gaza*. Associated Press. March 14, 2025.

140. Micheale Kihishen Gebru. *The United Arab Emirates Engagement in Ethiopia*. SWP. March 2025.

141. *UAE air bridge provides military support to Ethiopia gov't*. November 21, 2025.

142. *The UAE as a Security Partner in Africa*. International Institute for Strategic Studies. December 2024.

143. Rosella Marangio, "Türkiye's long game in Africa," in Dalia Ghanem, ed. *Türkiye's Cards in the World*. European Union Institute for Security Studies. May 2024.

144. Kalkidan Yibeltal and Basillioh Rukanga. *Ethiopia and Somalia agree to end bitter Somaliland port feud*. BBC. December 14, 2024.

145. Simon Marks. *Breakaway Africa Region Seeks US Recognition with Base, Minerals*. Bloomberg. July 30, 2025.

Additionally, Egypt's borders are surrounded by overlapping crises in Palestine, Libya and Sudan, which exacerbates and stretches the ability of the government to streamline its policies toward the HoA and weakens its ability to mobilize its tools effectively. This further exposes the disparity in the tools of influence and flexibility of deployment compared to other regional actors like the Gulf states and Türkiye.

Nonetheless, Cairo still possesses inherent strengths, like respecting and supporting state sovereignty and non-interference, capacity building as well as religious and cultural connections. But translating these elements into actual influence requires clear political will, long-term investment in both soft and hard power tools, expanding economic and institutional reach across the HoA, as well as monitoring (and coordinating with) other state's activities.

To this effect, several areas of proposed cooperation between Egypt and the HoA countries stand out. Most notably is supporting critical infrastructure projects (schools, hospitals, roads...etc.), expanding the education and medical missions and providing necessary training through local organizations, enhancing cooperation in maritime security and counterterrorism, supporting moderate religious and civic education through al-Azhar among others, and coordinating in the fields of renewable energy and agriculture. Thus, contributing to the creation of a sustainable partnership model.

Egypt can leverage the concerns of some HoA countries regarding Ethiopian, Emirati and Turkish pressures, to build flexible alignments based on the principles of shared interests and respect for sovereignty. Opportunities for tactical cooperation with countries such as Türkiye and the UAE remain, despite the strategic competition inherent in the bilateral relationship. Cairo may seek to create a cautious balance within the intertwined spheres of influence, capitalizing on circumstantial intersections such as shared concern by some parties about the monopolization of influence by one actor. This could represent an opportunity for Cairo to strengthen its role as an acceptable partner between rivals and a balancing actor in a highly complex environment. In this regard, Egypt should be more proactive and open to bilateral or tripartite coordination with Turkey and the UAE to minimize tensions, remain relevant and broaden regional manoeuvrability.

Chapter 8

India's Connector Role in the Red Sea Region: Opportunities and Caveats?

By Amaia Sánchez-Cacicedo

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India's Connector Role in the Red Sea Region: Opportunities and Caveats?

India's engagement with West Asia and East Africa dates back thousands of years, rooted in maritime trade and reinforced by the presence of Indian diaspora communities. India has thus viewed the Red Sea region¹⁴⁶ through the lens of its engagement with the broader Indian Ocean Region (IOR). At a time of growing US-China rivalry, India is becoming a pole with increased geopolitical leverage in the neighbourhood. It is also Africa's third largest trade partner, behind the EU and China.¹⁴⁷

India remains an energy-dependent country that imports more than half of its oil resources from MECs.¹⁴⁸ It therefore seeks to secure resources and critical raw materials, as well as access to strategically positioned Indian Ocean littoral states. New Delhi's approach to the Red Sea region has increasingly gained a geo-strategic dimension linked to securing crucial trade routes and counterbalancing China's presence along the coast of the Western Indian Ocean. India remains a pivot to the IOR while its pro-active minilateralism fits well into its 'connector' role across the region. This approach aligns with India's historical quest for strategic autonomy and its current multi-alignment.¹⁴⁹ New Delhi aims to advance its interests by strategically diversifying both its partnerships and the domains in which it engages.

As the most populous country in the world and the fifth-largest economy in the world, countries in the Red Sea region look to its great economic potential. New Delhi conceives the region as part of West Asia and North Africa (WANA), East and Southern Africa, as well as the littoral Indian Ocean.¹⁵⁰ The HoA is not viewed as a distinct regional construct. India has come to acknowledge the relevance of West Asian partners as part of its "Look West" policy launched in 2005. This was ramped up during Modi's first term under its "Link and Act West" policy, particularly in a post-'Arab Spring' environment. India's relationship with GCC countries has achieved an unprecedented degree of strategic heft to both sides' advantage. In the case of East Africa and littoral Indian Ocean states, the relationship is more imbalanced: the bulk of investment flows and technical know-how stem from India towards infrastructure and development projects in the region.

This chapter first unpacks the nature of India's growing footprint in the Red Sea region - rather a compilation of sub-regions from an Indian perspective - and its implications. It then looks at India's convergence with its key partners across a wide range of issue areas: this could trigger New Delhi's 'connector potential' across the Red Sea region, as explained in the following lines. Key fault lines exist too, such as New Delhi's flourishing relationship with Israel and long-term partnership with Iran, which may

146. This conceptualisation excludes Israel.

147. Confederation of Indian Industry, *Pathways for Shared Progress: India-Africa Economic Cooperation* (New Delhi: Confederation of Indian Industry, August 2024).

148. Nidhi Verma, "OPEC's Share in India's Annual Oil Imports Rises after Eight-Year Drop," Reuters, 17 January 2025.

149. New Delhi will cooperate and engage with all those that it can work with on the fundamental issues – such as national security, world trade and climate change – rather than take sides between powers in disputes. Shivshankar Menon, *India and Asian Geopolitics: The past, present*, (Penguin Random House India), 2021, p. 360.

150. Ministry of External Affairs, Government of India, "Divisions", n.d.a.

lead India's connectivity initiatives to become prisoners of complex regional dynamics. In addition, great power rivalry in the IOR may well lead to hedging among India's regional partners resulting in fragmentation and hindering New Delhi's sought-after 'connector' effect.

New Delhi's Multi-Alignment

New Delhi's multi-aligned foreign policy seeks to achieve national development by preserving its strategic autonomy¹⁵¹. India's wide-ranging engagement in the Red Sea region is no different. In the specific case of East African countries, the approach is development-focused without neglecting its geo-strategic importance as a trade transit route. The FDI-led model, including Public Private Partnerships (PPP) projects is the preferred option going forward to avoid debt stress, though technology transfer, concessional finance and lines of credit remain pervasive.¹⁵² New Delhi has further provided development and humanitarian assistance for disaster relief activities to countries across this sub-region, as well as grants and soft loans for infrastructure, education, energy, agriculture and health.¹⁵³ India has taken part in critical infrastructure projects, including the construction of a new railway line between Sebeta (Ethiopia) and the port of Doraleh (Djibouti).¹⁵⁴

The case of India's relationship with the Gulf countries is *sui generis*. Energy exports and the remittances sent home by an estimated 9 million Indian expat workers in GCC countries have traditionally been the cornerstones of the India-Gulf geo-economic relationship;¹⁵⁵ the UAE alone hosts 3.5 million Indian workers, which is three times the population of the UAE.¹⁵⁶ The signing of the Comprehensive Economic Partnership Agreement (CEPA) between India and the UAE in 2022 – India's third largest trading partner in 2022-23¹⁵⁷ – is reinforced by Gulf countries' eagerness to invest in large-scale construction projects in India since the 2010s.¹⁵⁸ In the case of Saudi Arabia and the UAE, the partnership has further integrated a strategic security dimension: India has ongoing activities in the realm of intelligence, counterterrorism and maritime co-ordination¹⁵⁹. The security relationship with the UAE further includes the co-production or licensed production of defence equipment.¹⁶⁰

Promoting inter-regional connectivity projects has become a priority for India's foreign policy. The launch of inter-regional connectivity initiatives such as the I2U2 (India-Israel-UAE-US) in October 2021 or IMEC (India-Middle East-Europe Economic Corridor) with New Delhi's strong backing in 2023 illustrate how this is happening across the Indian

151. Shivshankar Menon, "Thinking about India's Future", Centre for Social and Economic Progress (CSEP), August 2024.

152. Confederation of Indian Industry, Pathways for Shared Progress: India-Africa Economic Cooperation, op. cit.

153. K.M. Seethi, "India's HoA Engagements: Emerging Ties with Djibouti and Implications for Regional Dynamics", Asian Journal of Middle Eastern and Islamic Studies, Vol.1(74) (2024):371-385.

154. Ibid.

155. Dalia Ghanem and Amaia Sánchez-Cacicedo, "From Hype to Horizon: What the EU needs to know to bring IMEC to Life", op cit.

156. Navdeep Suri, "A Hindu Temple in a Muslim Nation: Religious Tolerance in the UAE", in Jabin Jacob et al. (eds.) Rethinking the Middle East, op cit., pp.77-80.

157. Ministry of External Affairs, Government of India, "India-UAE Bilateral Relations", 2024.

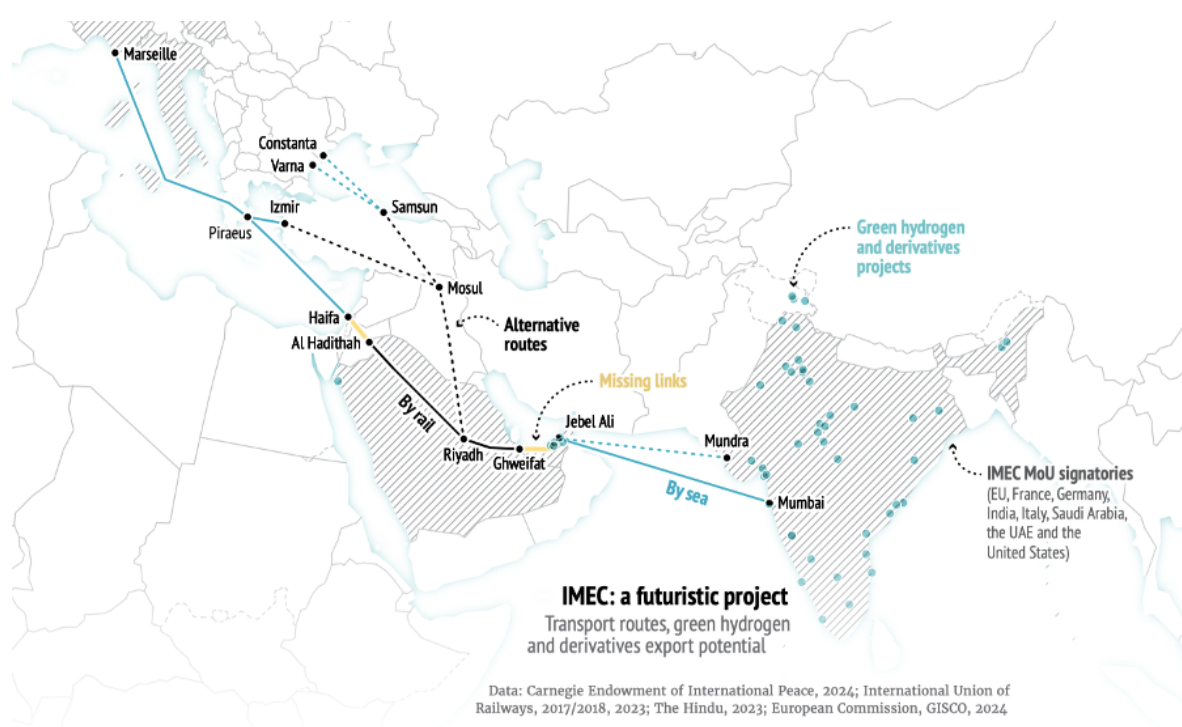
158. Jean-Loup Samaan, "India, a New Key Player in the Middle East", Institut Montaigne, October 14, 2024.

159. Nicolas Blarel, "Tradition and Transformation 2025: India's Evolving West Asia Playbook", in Jacob, Jabin et al. (eds.) Rethinking the Middle East, India's World. Vol. 1 (3) (2025):12-14.

160. International Institute for Strategic Studies (IISS), "Concerted Autonomy: Defence-Industrial Partnerships in the Asia-Pacific: Key Developments and Trends 2025", May 28, 2025.

Ocean specifically. India's determination to bring IMEC to fruition is remarkable. This vision, for now, involves the US, European countries (France, Germany and Italy), the European Union (EU), Saudi Arabia and the UAE. The exclusion of certain East and North African countries, most blatantly Egypt, and Oman in the Gulf region, constitutes a caveat for India's sought 'connector' role. As of late, however, New Delhi is pushing for the addition of an Egyptian-led alternative route via Alexandria (Egypt) to the original corridor that was meant to pass through Haifa (Israel) and continue to the port of Piraeus (Greece) and/or Marseille (France)¹⁶¹. This new route would avoid the geopolitical risk of the Haifa Port (Israel); it further comes with added cost efficiencies and the inclusion of North Africa's emerging economies.¹⁶²

Figure 5: The originally planned IMEC



Source: D. Ghanem and A. Sánchez-Cacicedo (2024)

161. Dalia Ghanem and Amaia Sánchez-Cacicedo, "From Hype to Horizon: What the EU needs to know to bring IMEC to Life", EU Institute for Security Studies (EUISS), June 18, 2024; Nilanjan Ghosh et al., "Rethinking India-Europe Trade Routes: In a New Era of Connectivity", Observer Research Foundation (ORF), June 2025 and Abba Abdel-Latif et al., "Introducing Egypt to the India-Middle East-Europe Corridor: A New Paradigm for Connectivity", The Egyptian Centre for Economic Studies (ECES), June 2025.

162. Abba Abdel-Latif et al., "Introducing Egypt to the India-Middle East-Europe Corridor: A New Paradigm for Connectivity", op. cit.

Figure 6: Suggested alternative by Egypt



Source: Abla Abdel-Latif et al. “The Golden Bridge Between Continents” (2025)

New Delhi further aims to achieve a leadership role as the voice of the Global South and future leader in ‘South-South cooperation’. This will also enhance its capacity to counterbalance Beijing’s expansive foothold in infrastructure building in the digital, maritime and health domains. India is particularly keen to export its Digital Public Infrastructure (DPI) model that leads to digital transformation and eventual financial inclusion to other parts of the world, as has been the case in Kenya.¹⁶³ India’s Pan-African e-Network launched in 2009 has successfully supported African countries, including in the Red Sea region, in distant education and tele-medicine activities through telecommunication links;¹⁶⁴ the project has now been renamed e-VidyaBharati AarogyaBharati (e-VBAB) and has been prolonged for another five years.¹⁶⁵

India as a ‘Connector’: Convergences and Fault Lines

India’s overall role towards the Red Sea region is consolidating as one of a ‘connector’. At this moment in time, convergences between India and the Gulf are most obvious, linked to shared geo-strategic interests, as well as the large Indian diaspora residing in the region. It is worth highlighting that a Hindu temple – the BAPS Swaminarayan Mandir – was inaugurated by India’s Prime Minister Modi in February 2024 in Abu Dhabi. This speaks to both the strategic convergence between the Gulf countries as well as the existing people-to-people connections that will likely endure. The difficulty of achieving naturalization or citizenship in Gulf countries for Indian residents – certainly impossible for low-skilled workers – remains a caveat.

163. Amaia Sanchez-Cacicedo, “India’s Digital Public Infrastructure: a Success Story for the World?”, Institut Montaigne, December 16, 2024.

164. Ministry of External Affairs, Government of India, “EAM inaugurates 2nd phase of Pan-African e-Network Project”, August 16, 2010.

165. Embassy of India, Asmara, Eritrea, “e-VidyaBharati AarogyaBharati (e-VBAB) Network Project”, n.d.a.

India's bet on South-South cooperation will, by definition, continue to seek engagement with its other partners in West Asia and North Africa, as well as the broader IOR. Egypt's strong alignment with the IMEC-E (IMEC–Egypt) corridor, which already enhances intra-regional connectivity between Gulf and West Asian countries, underscores this dynamic. New Delhi's active participation in the Indian Ocean Naval Symposium and the Indian Ocean Rim Association further demonstrates India's capacity to serve as a regional connector. India also reinforced this role by joining the Djibouti Code of Conduct / Jeddah Amendment as an Observer in 2020.¹⁶⁶

However, Beijing's growing footprint in the region is unquestionable. Much like India, Beijing is energy-dependent on its Middle Eastern partners which are all part of BRI, hereby benefitting from large-scale Chinese investments in their logistical facilities and infrastructure.¹⁶⁷ China has further invested in critical ports across Oman, the UAE, Saudi Arabia and Yemen; the US, nonetheless, remains the region's ultimate security provider as its military bases spread across countries in the Gulf illustrate.¹⁶⁸ This has not stopped Beijing from undertaking bilateral and trilateral maritime exercises with countries across the region, bringing Iran, Pakistan and Russia into the equation.¹⁶⁹

India does not have military bases in the HoA but has been involved in United Nations (UN) peacekeeping missions in Somalia, South Sudan and Ethiopia-Eritrea. New Delhi is not oblivious to the need to further protect crucial sea lines of communication (SLOCs) between the Suez Canal and the Strait of Hormuz, having sought to increase its defence and security relations with Sudan while regularly making port calls at the Port of Djibouti on transit.¹⁷⁰ India has further established significant naval cooperation with Oman, having conducted bilateral exercises with the latter, as well as with Qatar, Saudi Arabia and the UAE.

New Delhi is catching up with Chinese naval presence in the Indian Ocean by setting up naval listening outposts in Madagascar and Oman, and a naval military base on Agalega island (Mauritius).¹⁷¹ In addition, it has strategic investments in key ports such as the Colombo Port (Sri Lanka), Chabahar Port and Haifa. This speaks to India becoming an additional strategic pole with growing weight across the IOR. This can provide a much-welcome 'middle path' for countries in the IOR which may not seek to clearly position themselves on the side of the US or China: we are seeing this in India's backyard, as well as with Gulf countries and the HoA. Its strong investments in inter-regional connectivity projects can provide linkages across countries in the Red Sea region and between these and beyond.

166. Ministry of External Affairs, Government of India, "India joins the Djibouti Code of Conduct as Observer", September 16, 2020.

167. See visual in Amaia Sanchez-Cacicedo, "Maritime Contestation in the Indian Ocean: The Reengagement of Regional and Extraregional powers", in Alice Ekman and Steven Everts (eds.), "Contestation: The new dynamic driving global politics", EUISS, May 22, 2024, p.17.

168. Frédéric Grare and Jean-Loup Samaan, *The Indian Ocean as a New Political and Security Region*, (Palgrave Macmillan Cham), 2022.

169. Darshana Baruah, "China in the Indian Ocean: A Stronger Indo-Pacific Presence", IISS, May 22, 2025.

170. Ibid.

171. Amaia Sanchez-Cacicedo, "Maritime Contestation in the Indian Ocean: The Reengagement of Regional and Extraregional powers, op cit.

Yet, rising geopolitical stakes across the IOR could result in heightened fragmentation for countries across the Red Sea region. Economic and security co-option by China or India adds to the existing US-China rivalry. In the specific case of HoA countries, India's engagement feeds into extra-regional competition among the big powers that are increasingly present in this subregion¹⁷². The escalation of piracy off the coast of Somalia, which has spread across littoral East and Southeast Africa, is an example of this. Extra-regional powers have become further involved in countering non-traditional and transnational threats that include terrorism, drug trafficking, illegal, unreported and unregulated (IUU) fishing and maritime safety concerns. Djibouti, on its own, offers facilities for the military bases of the US, China, France, Japan and Italy; Saudi Arabia is planning to build one too. The UAE established military bases in Eritrea and Somaliland during the war on Yemen, while Russia has achieved an agreement to establish a naval base in Port Sudan.

From an Indian perspective, Russian and US presence in the region are strategically not particularly worrying as compared to China. New Delhi has conducted bilateral naval exercises with both Washington – which have now become multilateral in nature as part of QUAD arrangements – and Moscow across the Indian Ocean.¹⁷³ Russia's role is perceived as limited in West Asia, particularly after Assad's fall in 2024 and the recent Israel-US attack on Iran, while the US and India align under the 'like-minded' banner. New Delhi is however aware of Russia's ongoing quest for influence in North Africa and the Sahel.

India is also having to juggle competing interests vis-à-vis its partners in the region, which may not always coalesce for these. New Delhi's 'Link and Act West' equation very much includes Israel which may evolve into potential "fault lines" in New Delhi's relationship with its Arab partners, particularly against Israel's ongoing virulence against its Arab neighbours, most obviously so in Gaza. New Delhi has developed a low-profile but vital defence industrial relationship with Tel Aviv; India has become Israel's largest arms importer in 2024.¹⁷⁴ In fact, Israeli-Indian interests have expanded to include the pharmaceutical industry, technology, tourism, as well as agriculture and water management.¹⁷⁵ Despite the challenge, New Delhi has been able to strike a balance along the Israel-Gulf axis following the Abraham Accords.

Iran is also very much part of India's strategic interests in the region: the Chabahar Port (Iran) constitutes a gateway for New Delhi into Central Asia and Afghanistan. New Delhi needs to co-ordinate its Afghanistan policy with Teheran, while seeking a counterbalance to Pakistan. Turkey's influence across littoral countries in the Western Indian Ocean is, on the other hand, currently perceived as a growing risk for New Delhi. This is linked to Ankara's strategic alignment with Islamabad as its open support for Pakistan during the recent India-Pakistan crisis following the terror attacks in Pahalgam, Kashmir, illustrated.

172. K.M. Seethi, "India's HoA Engagements: Emerging Ties with Djibouti and Implications for Regional Dynamics", op cit.

173. Sayantan Haldar, "Advancing India's Maritime Interests Through Naval Diplomacy", op cit.

174. SIPRI Fact Sheet, "Trends in International Arms Transfers, 2024", SIPRI, March 2025.

175. Druva Jaishankar, *Vishwa Shatra: India and the World*, (Penguin Random House India), 2024.

The India - Red Sea Region Relationship: Untapped Potential

The Red Sea region's fate will be shaped by both regional and global geopolitical developments and, in particular, by the degree of volatility and armed conflict that the region is bound to endure. There are those who argue that connectivity initiatives such as the I2U2 or IMEC (still more of a futuristic project than a tangible reality) are mere wishful thinking against a region ravaged by instability and unpredictability. In contrast, others argue that guaranteeing economic development, be it in the form of intra-regional development projects or inter-regional connectivity initiatives, is the path to follow towards stronger inter-dependence and peace. This was part of the rationale behind the signing of the Abraham Accords and President Trump's current 'Riviera plans' for Gaza. China is also a proponent of key infrastructure and livelihood projects as the centre piece of economic development, as the laying out of the BRI has shown.¹⁷⁶ So where does India feature in these considerations?

New Delhi has the tools and desire to become a bridge across countries in the Red Sea region, which it can achieve if bringing IMEC to fruition with Egypt's inclusion. More importantly, it can play a 'connector' role with its multi-aligned and more nuanced positioning vis-à-vis leading regional players that can enable grand-scale inter-regional development initiatives, against many odds. New Delhi is keen to contain Turkish and Pakistani influence across Indian Ocean African littoral states while contributing to the economic emergence of North Africa and geopolitical stability in the GCC, home to 66 percent of non-resident Indians.¹⁷⁷ Countries in the Red Sea region stand to gain from increased connectivity both at intra- and inter-regional levels, precisely because of their own geopolitical concerns, as well as linked to influence ambitions of their own.

India's quest for a leading voice amidst the Global South can also be used strategically by partners in the region seeking to counterbalance Chinese influence while gaining leverage in fora such as the BRICS or the G-20, which include members from the Red Sea region. New Delhi is highly pragmatic in its dealings with partner countries, having learnt that parties need not agree on all issue areas to reach a worthwhile agreement with a given partner. Red Sea countries could adopt a more proactive role as a region with New Delhi's acquiescence amidst those arrangements where India has played a pivotal role, such as the International Solar Alliance (ISA) or the Global Partnership for Artificial Intelligence (GPAI), which New Delhi is an active part of despite its non-OECD status. Both the green tech and digital domains are crucial for the Red Sea region's future development.

In its 'connector' role towards the Red Sea region, however, New Delhi will have to continue walking a tightrope linked to its tight security relationship with Israel, the growing implications of a Turkish-Pakistani strategic alliance and its acquiescence towards Iran. New Delhi must be aware of its regional partners' own relationship and sensitivities vis-à-vis these crucial actors - Israel, Turkey and Iran respectively - in order not to tread on anyone's toes. The Red Sea region remains central to global geopolitical stability and prosperity.

176. Degang Sun and Jieying Zhang, "Peace through Development: China's Peace Initiative for the Middle Eastern Conflict Resolution", *China Quarterly of International Strategic Studies*, Vol. 07 (4) (2021): 383-408 and Neomi Neumann, "When the Riviera Meets the Sumud: Why Palestinian Realities Don't Mesh with Trump's Gaza Plan", *The Washington Institute for Near East Policy*, February 18, 2025.

177. Embassy of India, Riyadh, Saudi Arabia, "India and Gulf Cooperation Council", 2025.

Chapter 9

The Ruins of the Nation-State: Conflict and Interdependence in the Red Sea Region

By Nabil Al-Bukairi

Nabil Al-Bukairi is a Yemeni academic researcher specializing in issues of political thought, religion and the state, violent groups and terrorism, social movements, and democratic transformations in the Arab world and the Horn of Africa. He has published numerous studies, research papers, and books on Yemen, as well as topics related to security, terrorism, identity, culture, and the revolution. In 2012, he founded the Arab Forum for Studies in Sana'a and established and led the intellectual periodical magazine Muqarabat. He has supervised numerous research programs for various study centers and serves as an advisor to many of them.

The Ruins of the Nation-State: Conflict and Interdependence in the Red Sea Region

Yemen, along with other HoA countries, particularly Somalia and Sudan, is currently experiencing the repercussions of the collapse of the nation-state. This trend has transformed the region into a hotspot of perpetual conflicts that only pause to restart anew, threatening not only the regional security framework of this geopolitically significant area but also the global maritime security system as a whole. Indeed, at the forefront of this is the Bab-el-Mandeb Strait, which connects the Red Sea to the Gulf of Aden and the Arabian Sea, one of the world's most critical waterways, through which 6.7 to 12 percent of annual global oil production passes.

The idea of the nation-state emerged in these societies following the departure of colonial powers, introducing them to a modern concept of national identity that was largely unfamiliar. Northern Somalia, like southern Yemen, was under British colonial rule until 1967, while northern Yemen was governed by local Yemeni forces represented by the Zaydi Imamate system, to which the Houthi group today is affiliated. Southern Somalia and Eritrea were Italian colonies, while Djibouti was under French influence. However, the course of these countries towards consolidated nationhood was undermined by internal societal contradictions and the policies of the colonial powers, leading to long-standing and bloody conflicts whose effects continue to this day on both sides, most notably border disputes.

The fragility of these post-colonial states not only fuelled recurring conflicts but also reshaped population movements across the Red Sea. During the five last decades, mutual migrations, particularly Yemeni migration to the HoA, were a key feature of the post-colonial state. Yemenis migrated to East Africa in search of job opportunities and a dignified life, fleeing the oligarchic Zaydi Imamate system. This created a significant Yemeni presence in these societies.¹⁷⁸ Conversely, with the collapse of the Somali state and the wars in the HoA, there was a substantial influx of Somalis, Ethiopians, and Eritreans fleeing conflict to Yemen, many of whom have settled there and remain to this day. This chapter aims to discuss the dynamics governing societies on both sides of the Red Sea, emphasizing how the collapse of the nation-state, the persistence of external interference, and the rise of non-state actors have reshaped political authority, security, and migration across the region. It explores how these interconnected forces have transformed the Red Sea from a historical space of exchange into a fragmented arena of competition, where local fragility intersects with regional and global rivalries.

The Current Scene on Both Shores of the Red Sea

All the conflicts currently unfolding on both shores of the Red Sea are a natural consequence of the collapse of the nation-state in these societies. The return of tribal authority and the rise of violent groups have become the dominant dynamics shaping political and social life. This fragility stems from the weakness and lack of rootedness of the nation-state concept, which was expected to provide stability and cohesion but instead failed to take

178. Samson A. Bezabeh, "Yemeni Families in the Early History of Addis Ababa, Ethiopia ca. 1900-1950: A Revisionist Approach in Diasporic Historiography," *Cahiers d'études africaines* 51, no. 204 (2011): 893-919.

firm root. The ruling political elites in these countries failed to establish viable political systems capable of reinforcing the idea of the modern nation-state. As a result, societies lost confidence in this model, which was originally a European response to European problems. When transplanted into culturally and socially distinct contexts, it produced structural imbalances that continue to generate instability. The nation-state project itself is not the cause of the conflict, but the continued control of colonial powers over the affairs of these states and their ruling elites remains one of the main reasons behind their persistent crises and fragmentation.

Moreover, international actors have contributed to this decline. Rather than supporting fragile states, some external powers have encouraged coups, tolerated rebel militias, or selectively intervened, as seen in the case of US policies toward the Houthis in Yemen in 2014. In this environment, militias have gradually assumed the role of official actors. Networks of cooperation have emerged among these groups—such as between Yemen’s Houthis, Somalia’s Al-Shabaab, and the Islamic State in Puntland—driven by shared interests in arms smuggling, illicit trade, and the exchange of military and logistical expertise. Their activities directly threaten international maritime routes and regional stability.

It is within this broader structural and historical framework that the multiple ongoing conflicts across both shores of the Red Sea can be understood—not as isolated crises, but as interconnected manifestations of the same systemic fragility rooted in the erosion of the nation-state and the persistence of external domination.

Against this backdrop, the Red Sea region has witnessed escalating tensions for more than two years following Operation Flood of the Aqsa Mosque¹⁷⁹. The Iranian-backed Houthi Ansar Allah group attempted to exploit the situation to seek legitimacy, improve its tarnished image, and evade fulfilling the rights of the people under its rule. However, with the ceasefire on October 9, 2025, the Houthis completely lost the justification for their interventions in the Red Sea. The group, which controls approximately 30 percent of Yemen’s geography, including Red Sea coastal areas such as the city of Hodeidah, since their overthrow of the Yemeni capital, Sana’a, on September 21, 2014, has repeatedly disrupted maritime trade through the Bab-el-Mandeb Strait, a key artery for global oil and goods. These attacks have threatened global supply chains for oil and goods passing through the Bab-el-Mandeb Strait, reducing the number of ships transiting the strait by nearly 50 percent. Egypt, which controls the Suez Canal, has suffered significant revenue losses, estimated at around USD7 billion annually, due to this decline. This has also led to increased global insurance costs for ships and cargo, consequently driving up prices¹⁸⁰.

These developments and the significant threats posed by the Houthi group have jeopardized the Red Sea region’s security framework, dragging it into armed confrontations that have caused extensive damage to Yemen’s already fragile

179. Operation Al-Aqsa Flood is the operation carried out by the Izz al-Din al-Qassam Brigades, the military wing of the Islamic Resistance Movement (Hamas), in Gaza on October 7, 2023. It involved breaching the border fence with Israel, with Qassam forces infiltrating, killing, and capturing large numbers of southern Israelis. This operation is the largest in the history of both Hamas and Israel, and its repercussions continue to unfold, with Israel waging a war on the Gaza Strip that has caused extensive destruction and significant loss of life, which has not ceased to this moment.

180. Center for Strategic and International Studies, *The Global Economic Consequences of the Attacks on Red Sea Shipping Lanes* (Washington, DC: CSIS, 22 January 2024).

infrastructure. Additionally, the United States conducted a series of airstrikes targeting the Houthis during the period from March 15 to May 6, 2025 but America's ambiguous policies toward the Houthi group have made it difficult to predict the future of the relationship between the US and the Houthi group.

Meanwhile, Somalia is engulfed in a brutal war between state authorities and Al-Shabaab, an Al-Qaeda-affiliated group, in southern Somalia. Similarly, the Puntland region is engaged in fierce conflict with an Islamic State splinter group, led by Abdul Qadir Mumin in the Al-Miskad mountains, since its breakaway from Al-Shabaab in 2015. Additionally, Ethio-Eritrean relations are deteriorating fast, raising fears of a potential military confrontation between the two countries.

In Sudan, government forces have recently made significant progress, regaining control of the capital, Khartoum, and advancing toward western Sudan, where rebel forces, known as the Rapid Support Forces (RSF) led by Mohamed Hamdan Dagalo (Hemedti), are based. The RSF is reportedly backed by certain Gulf states, notably the UAE¹⁸¹, which seeks to control gold mines in western Sudan, particularly in Darfur.

In Ethiopia, the situation in Tigray is relatively calm, with some conflicts in the Oromia and Amhara regions. Nearby, Eritrea endures a highly complex political situation under the leadership of President Isaias Afwerki, who has ruled the country with an iron fist since its independence in 1993. Adjacent to it lies Djibouti, a state that survives by renting out its ports as military bases, with no development whatsoever, and where power is shared between the Afar and Issa Somali tribes.

Taken together, these developments confirm that the collapse of the nation-state continues to define the political geography of both shores of the Red Sea and the Gulf of Aden. This reflects also on the fact that on both shores, militias gradually assume the role of official actors amid the ruins of the failed nation-state, strategic cooperative relationships are emerging among these groups. For instance, a relationship exists between Yemen's Houthis and Somalia's Al-Shabaab, as well as the Islamic State in Puntland, despite ideological differences.¹⁸² These relationships are driven by shared interests in arms smuggling, the exchange of military and logistical expertise, and illicit trade across both shores, united by the common goal of threatening international maritime routes.¹⁸³

The Game of Shared and Conflicting Interests

The failure of the nation-state experiment on both shores of the Red Sea has not only harmed local societies but has also spread like a contagion, threatening the entire regional security framework. This is evident in the actions of the Houthi group, which directly endangers international maritime navigation. The Houthis' threat, initially claimed to target Israeli ships, extends to the broader regional and international maritime security system.

181. Ahmed Soliman and Suliman Baldo, *Gold and the War in Sudan: How Regional Solutions Can Support an End to Conflict*, Research Paper (London: Chatham House, 26 March 2025).

182. Ibrahim Jalal and Adnan al-Jabarni, *Dhows, Drones, and Dollars: Ansar Allah's Expansion into Somalia* (Beirut: Carnegie Middle East Center, 14 March 2025).

183. Samar Khader, "A Pact Between al-Shabab and the Houthis Threatens Red Sea Shipping," *New Lines Magazine*, 1 July 2025.

The international community's disregard for the consequences of the failure of the nation-state has led to all this chaos in the region and the rise of extremist militias on the ruins of the collapsed nation-state. Attempts to militarize and ideologize the state have clashed with local societies and, at times, their regional neighbours. A clear example is the leftist experiment in South Yemen during the 1970s, where the Marxist ideology turned into a source of internal conflict. The attempt to impose ideological transformation on a predominantly pastoral and agricultural society—lacking the means of production necessary for nationalization—proved disastrous, resulting in severe economic failure and deep social fragmentation.

Another issue was the dialectical class struggle, which sparked a major tribal conflict between the tribes of Shabwa, Abyan, and the tribes of Al-Dhale' and Yafa'—a division the leftist experiment was supposed to overcome. This internal strife undermined stability, and a threat to Gulf neighbours like Oman and Saudi Arabia.¹⁸⁴

A similar pattern of conflict also emerged on the opposite shore, between leftist regimes in Ethiopia and Somalia. The most severe collapse occurred with the fall of the Somali nation-state in the early 1990s, the effects of which persist today through massive Somali migrations and the failure to rebuild a unified Somali state. Somalia's geography is now fragmented into regions like the separatist Somaliland, Puntland, and Jubaland, which are in sharp conflict with the federal government in Mogadishu.

For decades, the international community has stood idly by, watching the civil war in Somalia unfold with timid and limited interventions, without a clear actionable plan to support reconciliation or restore the state. Instead, it has remained a bystander to the collapse of the state, allowing terrorist groups to thrive amid the state's ruins. Al-Shabaab, in particular, have become a global threat, ranging from piracy in the Gulf of Aden to transnational terrorist organizations, and global counterterrorism efforts remain insufficient compared to the scale of the threat posed by such groups.

A similar pattern occurred in Yemen. Following the February 11, 2011, revolution, Yemen underwent a national dialogue involving all parties, including the Houthis, and was on the verge of a political transition based on the dialogue's outcomes. However, the Iran-backed Houthis disrupted this national consensus, with their militias seizing Sana'a in September 2014. The international community responded weakly, limiting itself only a single UN resolution (2216), calling for the Houthis to withdraw and disarm, but was never enforced.

The comparison between Somalia and Yemen is particularly revealing. In both contexts, the failure of the state and of political elites to create an inclusive and responsive national project led to a regression of societies to a pre-state condition marked by tribalism, nomadism, and the rise of violent non-state actors. The Somali and Yemeni experiences thus mirror each other as parallel manifestations of the same structural failure: the disintegration of state authority and the return of fragmented social orders.

184. The leftist regime governing Aden in South Yemen posed a direct threat to its Gulf neighbours, such as Oman and Saudi Arabia, by supporting the Dhofar Liberation Front and the Arabian Peninsula Liberation Front in the mid-1970s.

The neglect of Somalia's collapse by regional actors was equally consequential. Instead of intervening positively to restore stability, some have exploited the chaos in Somalia or Yemen for short-term gains, which could have been achieved more legitimately and sustainably through stable and unified states. This tendency to perpetuate instability to justify ongoing intervention remains visible today. Indeed, despite their economic strength and cultural influence, the Gulf states have not translated their strategic presence into a coherent regional stabilization policy. Given these complementarities, the financially strong and politically stable Gulf states should play a leading role in supporting the restoration of the nation-state in Somalia, Yemen, and Sudan, given their strategic locations and diverse resources unavailable in the Gulf.

Conclusion

Despite persistent turmoil across Yemen, Somalia, and Sudan, the Bab-el-Mandeb region's future hinges on addressing the structural roots of instability—weak states, economic fragility, and external interference. Peace and stability are vital not only for local societies but also for Gulf nations whose prosperity depends on secure maritime trade through the Red Sea.

A unified approach to the region's challenges is needed to ensure security and stability for all. The true path to resolving tensions on both shores of the Red Sea and Bab-el-Mandeb lies in supporting and restoring the pluralistic federal nation-state in collapsed societies like Yemen, Somalia, Sudan, and to some extent Ethiopia. This would be the key to rebuilding bridges of communication and cooperation, halting endless forced migration, violence, and organized crime, and optimizing the use of wasted resources in these fragile, collapsed states.

Recovering the state in Yemen, Somalia, Sudan, and the HoA is a shared interest for the region and the world. Achieving sustainable peace requires inclusive local participation grounded in traditional governance and supported by strong international engagement. Global powers and regional actors—especially Saudi Arabia, Qatar, the UAE, and others—should coordinate genuine partnerships based on mutual respect and shared security interests. Most importantly, all international efforts to combat terrorism and piracy will remain futile unless they include support for fragile states to restore their security and stability.

This could lead to a unified economic forum encompassing both the Gulf and the Horn, fostering economic integration and leveraging resource diversity. Yet Iran's continued arming of sectarian militias like the Houthis undermines these efforts, perpetuating regional instability. True peace depends on rebuilding effective state institutions and forging a pluralistic social-political contract that restores national legitimacy and halts the spread of violent non-state groups thriving on the collapse of governance across both shores of the Red Sea.

Section 2

Geo-economics and Economic Development



This photo taken on Nov. 8, 2024 shows the Doraleh Multi-Purpose Port in Djibouti City, capital of Djibouti. (Photo by Wang Guansen / XINHUA / Xinhua via AFP)

Chapter 1

Beneath the Surface: A Shared but Unequal Maritime Space

By Luigi Narbone and Carlo Palleschi

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Beneath the Surface: A Shared but Unequal Maritime Space

The Red Sea maritime system lies at the crossroads of both global and regional trade flows. It connects the main east–west corridor between Asia and Europe with a dense web of regional ties linking the Arabian Peninsula and the Horn of Africa (HoA).

On the global scale, the Bab-el-Mandeb-Suez Canal axis provides the shortest sea route from Asia to Europe and channels roughly one-third of global container traffic, 8–10 percent of global seaborne liquefied natural gas (LNG)¹⁸⁵ and oil, and 40 percent of Asia-Europe trade. But high traffic volumes and a strategic geographical location that links the Indo-Pacific to the Atlantic through the Mediterranean are not the only reasons that explain the centrality of the Red Sea in global maritime flows. This waterway is also one of the major global maritime chokepoints, making it vulnerable to incidents and security challenges. One example was the 2023–25 crisis triggered by Houthi attacks on commercial vessels in the framework of the Israel-Hamas war. The attacks have resulted in the redirection of over 50 percent of trade volumes to the route around the Cape of Good Hope, adding 10–12 additional days in transportation time, disrupting supply chains and raising costs. Traffic through the Red Sea and the Suez Canal fell by almost three-quarters, with a strong impact on the economies of littoral states, revealing a strong dependence on a fragile chain of maritimenodes.¹⁸⁶

At the regional level, Gulf–Horn exchanges show a high degree of economic complementarity beneath which lie persistent structural asymmetries. These asymmetries are most visible in trade patterns. The Gulf exports high-value manufactured and energy goods and imports low-value primary commodities from the Horn, reinforcing unequal terms of trade. They also manifest in infrastructure and port development, which—although vital for the Horn’s growth and state revenue—often take the form of sovereignty bargains. The result is a system that is shared in geography but unequal in structure—a maritime space that connects regions but continues to reproduce fault lines. Yet the 2023–25 Red Sea crisis, which served as a stress test for both shores, could also push stakeholders to rethink their relationship. Shared vulnerabilities could be used to seek joint solutions.

This chapter first examines the evolving trends in maritime trade, highlighting how global and regional flows intersect and how Gulf and Horn states perceive and harness the maritime potential of the Red Sea in different ways. It then explores the drivers of this asymmetric relationship, providing some key examples. Finally, the chapter offers reflections and policy outlooks, proposing ways to align visions and interests across the two shores to transform this critical waterway from a dividing line into a platform for cooperation.

Evolving Trends in Maritime Trade

The Gulf countries’ maritime infrastructure is the backbone of the Red Sea system. Shipping lines increasingly use very large vessels, and this creates a demand for efficient hubs with fast turnaround and proximity to main trade routes. To take advantage of ongoing changes

185. Alec Mills, “The Long Shadow of the Red Sea Shipping Disruption,” Atlantic Council, 8 January 2024.

186. World Bank, “MENA FCV Economic Serie Brief,” February 2025.

in the global logistic sector, Gulf countries are investing in ports, terminals, free economic zones and logistics services as key components of their economic diversification strategies. The ambitious goal is to transform the Arabian Peninsula into a strategic platform for global and regional trade.¹⁸⁷ Facilities such as Jebel Ali in the UAE, Sohar in Oman, Jeddah Islamic Port, King Abdullah Port (KAP), Yanbu, and Sokhna in Saudi Arabia, and Safaga in Egypt, operate as global-scale infrastructures fully integrated into long-haul east–west networks.

Facing the twin challenges of energy transition and high demographic growth, Saudi Arabia has turned to its relatively underdeveloped Red Sea coast. Saudi Vision 2030 aims at locating future manufacturing, tourism and new urban centres in this area to create jobs for its young population and deepen the Kingdom’s links with the global economy. Within this framework, port investments play an important role, as they leverage the country’s geographical location and economic weight, making Saudi Arabia a major logistics hub for Europe-Asia and Asia-Africa trade flows.¹⁸⁸ KAP is a good case in point: this purpose-built facility aims to serve the Asia–Europe mainline and has become one of the fastest-growing ports in the world by offering minimal deviation and trans-shipment services for container mega-vessels.

The UAE has followed a similar trajectory, leveraging its competitive advantage in logistics as an instrument of geo-economic and geopolitical influence across the Red Sea. Through DP World and AD Ports Group, two giant global players in this sector, the UAE operates or manages terminals such as Port Said in Egypt, Aqaba in Jordan, and Berbera and Bosaso in Somalia, along with other facilities on the wider Indian Ocean rim.¹⁸⁹ This global network positions the UAE as a key transit hub for east–west exchanges while providing Abu Dhabi with tools to pursue its objectives in a vast area from the Mediterranean to the HoA.

On the African side of the Red Sea, the strategic geography pairs with a series of structural dependencies that severely constrain the countries of the region. HoA economies are predominantly based on agriculture, minerals, and livestock exports, and feature much lower GDPs per capita and high levels of human insecurity. This condition makes them dependent on external powers’ economic and financial leverage. Furthermore, Ethiopia, landlocked since Eritrea’s independence in 1993, channels over 90 percent of its trade through Djibouti’s ports at a cost of roughly USD 1 billion per year.¹⁹⁰ Higher logistic costs reduce Ethiopia’s competitiveness and make it more vulnerable to external economic and geopolitical shocks. To counter these constraints, Addis Ababa has recently sought access to the sea through the MoU with Somaliland, combining economic objectives with a political narrative on the central role of a Red Sea outlet in the country’s strategic vision.

For Egypt, the Red Sea’s centrality is defined by the Suez Canal as a key gateway of global maritime commerce. The canal contributes roughly USD 9 billion annually in transit fees and constitutes one of the country’s few and fast-growing sources of foreign currency.¹⁹¹ The

187. Strategic Comments, “The push to increase trade connectivity on the Arabian Peninsula,” Strategic Comments 30, no. 3 (2024): viii–xii.

188. Luigi Narbone and Cyril Widdershoven “The Red Sea link. Geo-economic projections, shifting alliances, and the threats to maritime trade flows”, MEDirections, European University Institute, 2021

189. Federico Donelli, “Power Competition in the Red Sea”, Op. cit.

190. Guled Ahmed, Djibouti Needs a Plan B for the Post-Guelleh Era, (Washington, DC: Middle East Institute, July 20, 2021)

191. World Bank, “MENA FCV Economic Serie Brief”, February 2025.

Suez Canal area is also the location of numerous MEGA infrastructural projects, free trade zones and investments under Egypt's Vision 2030. Yet this centrality is also a major source of vulnerabilities. The 2024–2025 crisis resulted in a sharp decline in canal traffic which has cost Egypt about USD 7 billion in lost revenue.¹⁹² The crisis also exposed the paradox of Egypt's position: while it commands one of the world's most strategic chokepoints, it lacks control over the broader dynamics that determine the volume of maritime throughput.¹⁹³

Similarly, for the broader region, addressing the security challenges which mark this strategic waterway is an essential precondition for the success of investment plans. Enhancing the Red Sea's role in global trade and logistics requires both maritime security and regional stability.

Convergences and Fault Lines

Strictly intertwined with the infrastructural development described above is the growth of regional maritime trade, which has generated functional complementarities that link the economies of the two shores. Food and energy provide the clearest examples. The Gulf states import over 85 percent of their food,¹⁹⁴ relying increasingly on agricultural investments across the HoA to secure long-term supplies.¹⁹⁵ In turn, Horn economies benefit from Gulf energy, capital and logistics.¹⁹⁶

These flows create the appearance of reciprocal integration, with both sides connected through mutually reinforcing commercial ties and shared growth ambitions. Yet beneath this surface complementarity lies a series of structural asymmetries that define the economic and political relationship between the two shores. This becomes evident when examining the structure of trade flows. The Gulf countries export high-value goods—refined petroleum, manufactured products, construction materials, and financial services—while the Horn exports low-value commodities, mainly livestock and agricultural product and minerals, especially gold.¹⁹⁷ Trade is overwhelmingly tilted toward the Gulf states (especially Saudi Arabia and the UAE), which are among the top five suppliers for all major Horn economies. Refined petroleum dominates import, accounting for nearly 90 percent of Ethiopia's imports from Saudi Arabia and about 38 percent of Djibouti's imports from the UAE.¹⁹⁸ In contrast, for the Gulf trade with the Horn represents instead only a marginal destination, both in global terms and in terms of overall commercial exchanges with Africa.

This asymmetric dynamic extends to infrastructure and logistics control. The Gulf countries manage the logistics companies that regulate the movement of goods across the Red Sea and control the shipping fleets. Conversely, the HoA's economies remain

192. Ibidem.

193. Federico Donelli, "Power Competition in the Red Sea", Op. cit.

194. African Center for Strategic Studies, "Mapping Gulf State Actors' Expanding Engagements in East Africa," Report (Washington, DC: African Center for Strategic Studies, June 2025).

195. For a detailed discussion of this topic, see the chapter in this eBook "Land, Livelihoods and Leverage: Rethinking GCC–HoA Ties".

196. Koffi Yeboua and Jakkie Cilliers, "Development Prospects for the HoA Countries to 2040," Report (Pretoria: Institute for Security Studies, June 2023).

197. Based on data retrieved from the Observatory of Economic Complexity.

198. Data refer to 2023. Source: Observatory of Economic Complexity.

structurally dependent on Gulf countries and other external actors for investment and port development.¹⁹⁹ Gulf investments have been essential across the Horn, financing the development of ports, roads, and free zones such as Berbera, Massawa, and Port Sudan.

These structures are crucial for national economies, representing a primary source of state revenue and political legitimacy. For example, approximately 80 percent of the merchandise handled in Djibouti's ports consists of onward transit and reexports to Ethiopia, generating annual revenues of about USD 400 million from port fees alone.²⁰⁰ Similarly, nearly 90 percent of Sudan's USD11 billion in exports transits through Port Sudan, making 30 percent of Sudan's GDP.²⁰¹ At the same time, port concession agreements with Gulf investors are also a form of sovereignty bargaining, where financial inflows are often exchanged for strategic alignment or political recognition. In this system, a lease might entail a subtle transfer of autonomy, reinforcing the asymmetry between capital-rich Gulf actors that pursue their own agenda, and recognition-seeking African governments.

The case in point of this dynamic is the 2016 agreement between Somaliland and the Emirati company DP World for the development of Berbera Port. The agreement brought USD300 million in investment to develop the port and the adjacent free-trade zone.²⁰² Moreover, the Abu Dhabi Fund for Development spent almost US 90 million building a new paved road linking Berbera with the capital Hargeisa²⁰³ and, crucially, to the Ethiopian border. This investment paved the way for the subsequent Somaliland-Ethiopia agreement. For Somaliland, the partnership with DP World offered a crucial form of external partnership, strengthening its position in the ongoing quest for international recognition. In return, the UAE gained influence over Somaliland's foreign policy orientation, countering the growing presence of its regional rivals, Türkiye and Qatar, compensating its inability to continue managing Djibouti port and obtaining, in 2018, a 25-year concession to establish a naval base near Berbera.

Djibouti provides another example of how port investments in the Horn often involve political and sovereignty considerations. In 2018 the small HoA country decided to unilaterally terminate Emirati DP World's 30-year concession over the Doraleh Container Terminal triggering an international arbitration dispute.²⁰⁴ The government justified the move as necessary to "preserve national sovereignty and economic independence," accusing the Dubai company of willingly keeping the cargo traffic below potential. This episode underscored that port concessions are not merely commercial arrangements and often come at the cost of sovereignty.

The 2023–25 Red Sea crisis brought these asymmetries to the fore. Although the Houthi attacks and the ensuing collapse in maritime traffic affected all littoral states, the consequences were unevenly distributed across the two shores. The Bab-el-Mandeb

199. Jos Meester, Willem van den Berg and Harry Verhoeven, "Riyal Politik: The Political Economy of Gulf Investments in the HoA," Report (The Hague: Netherlands Institute of International Relations Clingendael, 2018).

200. World Bank, "Djibouti Country Economic Memorandum", January 2024.

201. Harvard Kennedy School, Belfer Center for Science and International Affairs, "The Other Side of the Strait: The Strategic Significance of the Houthi's Aggression for East Africa," Report, March 2024.

202. Financial Times, "The UAE's rising influence in Africa", 30 May 2024.

203. Ibidem.

204. Reuters, "Djibouti ends Dubai's DP World contract to run container terminal", February 2018.

-Suez route disruption caused a container throughput drop by over 80 percent in Jeddah Islamic Port and KAP.²⁰⁵ However, the Kingdom, supported by its vast fiscal reserves and diversified trade routes such as the Saudi–Haifa Land Bridge and the Gulf–Levant overland corridors, managed to absorb the shock and retain systemic control.²⁰⁶ Similarly Egypt suffered a dramatic loss of revenue, but its strategic position as the northern gate remains indispensable for any future restoration of normal shipping flows.

In contrast, given the limited reserves and lack of viable alternatives, the disruption has proven existential in the HoA. As transit halted in ports such as Berbera and Port Sudan – which was also struggling with the consequences of ongoing civil war in Sudan – fuel shortages deepened, and domestic supply chains were disrupted. The availability and price of imported commodities,²⁰⁷ employment, household incomes, and food access were also impacted.²⁰⁸ For example, the slowdown in Djibouti’s port activities led to a loss of employment and reduced household purchasing power²⁰⁹, while Somalia faced rising prices of imported food like rice, wheat, and vegetable oil.²¹⁰ Moreover the effects extended beyond the Horn, impacting neighbouring landlocked countries whose economies are directly linked to the region’s maritime gateways. Port Sudan, for instance, serves as a key commercial outlet not only for Sudan but also for South Sudan, Chad, and the Central African Republic, which means that disruption at the port hindered trade flows for these countries as well.²¹¹

Reflections and Outlook

The blending of high-intensity global and regional trade and multiple security challenges makes the Red Sea an arena where asymmetrical interdependence is constantly reproduced, projecting divergent rationalities. For Gulf states, investing in African ports secures logistical depth, access to livestock and agricultural products which is key for their own food security as well as to secure political footholds in a strategic region. For HoA governments, leasing access to the coastline offers immediate rent, attracts much needed foreign investment and provides international visibility, but erodes long-term autonomy. Against this backdrop, the 2024–2025 crisis was a stress test that magnified this unequal relationship.

Paradoxically, the crisis also revealed that shared vulnerabilities, if properly managed, could become a new driver of convergence. As global shipping bypassed the Red Sea, all littoral states realized that chokepoints security can only be ensured through stabilisation of the entire corridor. For the Gulf countries this can only be achieved with a long-term engagement with the countries on the opposite shore, privileging cooperation over zero-sum approaches and power competition. The approach should aim to design and implement joint strategies to respond to the threats posed by non-state actors and terrorist groups, and to the root causes that favour the emergence of such actors. On the other hand, for the HoA, the crisis

205. Ocean Mind, “How the Red Sea Crisis has impacted international shipping activity and emissions at Saudi ports”.

206. World Bank, February 2025, Op. cit.

207. World Food Programme, “Djibouti Country Brief”, Op. cit.

208. FAO, “Crop Prospects and Food Situation”, November 2024.

209. IPC, “IPC Analysis of Acute Food Insecurity and Acute Malnutrition, January–December 2024”, June 2024.

210. IPC, “Somalia IPC Acute Food Insecurity and Acute Malnutrition Analysis July–December 2024”. September 2024.

211. Harvard Kennedy School, March 2024, Op. cit.

further highlighted the need to reduce overdependence and the urgency of diversification, as illustrated by Ethiopia's renewed efforts to operationalize alternative outlets through Berbera. Successfully meeting these needs requires a clear understanding of the common challenges and more joint agency from the HoA in their relationship with the Gulf countries.

Whether this Red Sea crisis becomes transformative or regressive depends on what follows. If Gulf actors use the disruption to consolidate dominance, i.e. by building alternative and exclusionary corridors, securitizing maritime zones, and investing selectively in compliant partners—asymmetry will deepen, with African ports reduced to peripheral service nodes. If instead the crisis leads to joint governance, risk-sharing mechanisms, and infrastructure co-management, asymmetry could gradually decline. The challenge is to turn shared vulnerability into shared responsibility.

For This to Materialize, Three Lines of Action Should Emerge.

First, intensifying and operationalizing cooperation. For instance, maritime security cooperation, one of the few domains where convergence has been translated into practice, could be reinvigorated. Indeed, the fight against piracy and trafficking during the 2010s produced frameworks for joint action, notably the Combined Task Force 151 and the Djibouti Code of Conduct, (DCoC) with its Jeddah Amendment of 2017. These mechanisms facilitated information exchange, capacity building, and coordinated patrols. Revitalizing such initiatives in the aftermath of the crisis could transform the experience of vulnerability into a foundation for collective security governance, bridging the structural divide rooted in the Red Sea's geography.

Furthermore, the Red Sea Council, a Saudi promoted multilateral setting, involving numerous countries from across the Red Sea, could evolve from a political forum into a framework to agree and test operational mechanisms addressing maritime security, trade facilitation, and environmental protection. Much of the political viability of these cooperative frameworks will depend on making them useful to successfully respond to the numerous shared challenges that plague the Red Sea.

Second, another area of work for the Red Sea Council or a similar ad hoc institution, should be to work towards standard concessions, fees, and agreements to ensure that the ports within the maritime system across the Red Sea gradually turns into one integrated maritime system which can facilitate the achievement of economic and developmental goals of all Red Sea stakeholders, maximize trade and interdependencies and avoid the current politicization of investment in such infrastructural projects.

Third, efforts should be made to broaden the developmental base of Gulf investment. Infrastructure financing should move away from extractive and rent-seeking goals and favour joint value creation—industrial zones, training centres, and logistics parks that integrate African labour and production into regional and global supply chains. Gulf involvement in “soft infrastructure”—customs digitalization, maritime education, and regulatory reform—would help achieve these objectives, thus rebalancing the relationship across the Red Sea.

Chapter 2

Scarcity to Strategy: Water Cooperation across the Red Sea

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Scarcity to Strategy: Water Cooperation across the Red Sea

The Red Sea basin has evolved from an environmental issue to a defining factor shaping the geopolitics, economies, and security of the HoA and the MECs. The stability of this vital maritime corridor, which underpins global trade and regional livelihoods, depends on transforming water scarcity from a source of competition into a foundation for cooperation. The central argument of this chapter is that transparent resource management, strong regional institutions, and joint investments are essential to rebalance power and ensure equitable benefits across both shores.

Gulf states, constrained by scarce natural water resources, have directed capital, technology, and expertise westward into Africa to secure fertile land, food supply routes, and water access. In parallel, African migrant workers are moving eastward toward the Gulf in search of employment and stability. These opposing flows reflect a growing interdependence that extends beyond trade into social, environmental, and political spheres. The hydro-politics of major rivers such as the Nile and Juba–Shabelle, alongside the Gulf’s reliance on Red Sea ecosystems for desalination, illustrate how water has become a shared strategic asset. This chapter examines the trends driving these dynamics, the areas of convergence, and the fault lines, as well as the opportunities for transforming water into a catalyst for resilience and sustainable development.

Taking Stock of the Current Trends

The HoA has faced severe climate stress over the past decade. Between 2020 and 2022, the region experienced its most severe drought in forty years.²¹² Four consecutive rainy seasons failed, leading to extensive crop losses, and forcing over 30 million people into acute food insecurity.²¹³ Climate attribution studies show that such droughts are now at least 25 times more likely due to global warming.²¹⁴ These effects are intensified by rapid population growth at 2.5 percent annually, adding approximately eight million people each year.²¹⁵ Less than half of the population has access to safe drinking water, while over 80 percent of agriculture remains rain-fed.²¹⁶ Moreover, rapid urbanization in cities such as Addis Ababa, Nairobi, and Khartoum is accelerating groundwater extraction for domestic and industrial use. In arid areas such as Eritrea and Djibouti, aquifer depletion has created dependency on imported water and emergency desalination.²¹⁷ These pressures have made rural-urban migration and water trucking common, further straining city infrastructure and municipal budgets.

212. World Meteorological Organization, “State of the Climate in Africa 2021,” WMO Report No. 1305 (Geneva: World Meteorological Organization, 2022).

213. Ibidem.

214. Intergovernmental Panel on Climate Change, “Sixth Assessment Report: Impacts, Adaptation, and Vulnerability,” Report (Geneva: Intergovernmental Panel on Climate Change, 2021).

215. World Bank, “HoA Groundwater for Resilience Project,” Project Appraisal Document (Washington, DC: World Bank Group, 2024).

216. Ibidem.

217. World Meteorological Organization, 2022, Op. cit.

The HoA's growing water stress is not occurring in isolation but is closely connected to broader climatic shifts across the Red Sea basin. The Intergovernmental Panel on Climate Change projects a temperature rise of 2–4 °C across the Red Sea basin by 2050.²¹⁸ This warming is expected to lead to a one-third reduction in runoff from the Ethiopian Highlands, a 10–15 percent rise in evaporation on the Arabian Peninsula — further increasing demand for desalination— and sea-level rise accompanied by saltwater intrusion into coastal aquifers. These effects will further tighten the link between Gulf and Horn countries' water systems. In 2023, nearly 400,000 people used the Eastern Migration Route, crossing from the HoA through Djibouti into Yemen, an increase of 64 percent from 2021.²¹⁹ Migration reflects both economic dependency and shared climate vulnerability between the two shores.

Across the Arabian Peninsula, the water crisis is systemic. Nations such as Bahrain, Kuwait, Qatar, Saudi Arabia, and the United Arab Emirates (UAE) are among the world's most water-stressed countries. Driven by population growth and heavily subsidized water prices, water demand continues to increase. In some Gulf cities, daily water consumption exceeds 500 litres per capita, three times the European average²²⁰. To meet demand, Gulf states rely on desalination for between 60 percent and 90 percent of their domestic water supply, accounting for roughly 40 percent of global desalination capacity²²¹. The process, however, is energy-intensive and environmentally taxing, consuming 4–6 kWh per cubic meter and generating hypersaline brine that threatens marine life.²²²

Since 2008, Gulf sovereign funds and agribusinesses have acquired over 1.8 million hectares of farmland in Sudan, Ethiopia, and Kenya, often linked to port, rail, and irrigation projects using Gulf technologies.²²³ These deals, however, have drawn criticism for overlooking customary land rights and aggravating local grievances.²²⁴ More recently, Gulf investors have pursued forest and land acquisitions for carbon credits, mirroring models seen in SADC and ECOWAS countries.²²⁵

Competing Interests and Common Ground

Both sides of the Red Sea face existential risks from worsening water scarcity and climate stress. Without urgent adaptation measures, regional GDP could decline by 6–14 percent by 2050.²²⁶ These common threats provide an incentive for cooperation between the shores through shared investments, data exchange, and joint resilience programs. The HoA holds substantial water reserves, renewable energy potential, and a young workforce, while Gulf states contribute capital, advanced technology, and an energy surplus. Together, these assets underpin cross-regional projects such as solar-powered desalination plants in Eritrea, food corridors via Port Sudan, and hybrid energy agreements.

218. Intergovernmental Panel on Climate Change, 2021, Op. cit.

219. Al Jazeera, "Rise in HoA Migrants to Gulf States Worrying: UN," 12 September 2023.

220. African Development Bank, "Water Security in the Greater HoA: Challenges and Opportunities," Report (Abidjan: African Development Bank Group, 2020).

221. Ibidem.

222. UN-Water, "What Is Water Security?," Report (Geneva: United Nations Inter-Agency Coordination Mechanism on Water, 2013).

223. GRAIN, "From Land to Logistics: UAE's Growing Role in the Global Food System," Report (Barcelona: GRAIN, 2024).

224. Ibidem.

225. World Bank, 2024, Op. cit.

226. Intergovernmental Panel on Climate Change, 2021, Op. cit.

However, this shared vulnerability has also exposed asymmetric positions. One major issue is the unequal bargaining power of Gulf investors, who often negotiate opaque, long-term deals with fragile states in the Horn, prioritizing Gulf interests without sufficient regard for local communities. In Gambella (Ethiopia) and Gezira (Sudan), for instance, protests erupted over unchecked groundwater extraction for export crops, as residents accused foreign investors of depleting aquifers without fair compensation.²²⁷ This dynamic has given rise to the so-called phenomenon of “water grabbing,” similar to land grabbing, whereby dominant powers exploit scarce water resources to gain strategic advantages.

Institutional weaknesses exacerbate these tensions. Unlike other shared basins, such as Senegal or the Mekong, the Red Sea lacks a binding framework for consultation, data exchange, or conflict resolution²²⁸. The Nile Basin Initiative remains a voluntary forum, while IGAD’s transboundary water program has limited enforcement capacity. These weaknesses make collaboration fragile and vulnerable to capture by particular interests and geopolitical considerations, rather than being guided by shared resource-management objectives. The 2017–21 Gulf diplomatic crisis offers an example of how geopolitical rivalries can spill over into the HoA. During this period, rival Gulf states extended financial aid, military bases, and agricultural investments, to competing local actors²²⁹, which deepened divisions rather than fostering cooperation. While Gulf initiatives are often more visible, the Horn has also demonstrated significant agency by shaping aid negotiations, land-use regulations, and bilateral agreements, thereby influencing Gulf behaviour through negotiation and political leverage.

The shared risk also creates opportunities for mutual benefit. Both regions stand to gain from initiatives that align Gulf capital with African natural resources and labour, focusing on sustainable agriculture, renewable energy, and improved water technologies.²³⁰ These synergies could reshape regional food and energy security if managed equitably. Additionally, cooperation could extend to research partnerships and innovation hubs for climate-resilient technologies, improving adaptation capacity and creating skilled jobs in both regions.²³¹ Furthermore, joint disaster management frameworks for floods and droughts could become a key area for building trust, where coordinated response plans could reduce the impact of extreme climate events.²³²

A key driver of GCC engagement is the recognition of water as fundamental to national development plans, including Saudi Arabia’s Vision 2030,²³³ where industrial diversification and new mega-cities like NEOM depend on sustainable water supplies, and the UAE’s “Water Security Strategy 2036” which targets a 100 percent secure water supply through desalination, recycling, and international partnerships.²³⁴ GCC investments in the Horn are thus primarily aimed at securing food production chains, guaranteeing long-term access to water and land, diversifying their economic base, and gaining influence over vital maritime and logistics routes that connect global markets.²³⁵

227. Time, “Gulf Agribusiness and Water Resource Conflicts in Africa,” 18 October 2023,

228. Ibidem.

229. BBC News, “Egypt Angry as Ethiopia Fills Nile Dam Reservoir,” 13 July 2023,

230. African Development Bank, 2020, Op. cit.

231. World Bank, 2024, Op. cit.

232. Intergovernmental Panel on Climate Change, 2021, Op. cit.

233. Kingdom of Saudi Arabia, “Saudi Vision 2030: Water and Environmental Sustainability Pillar,” Policy Document (Riyadh: Government of the Kingdom of Saudi Arabia, 2023).

234. Government of the United Arab Emirates, “UAE Water Security Strategy 2036,” Policy Document (Abu Dhabi: Ministry of Energy and Infrastructure, 2023).

235. GRAIN, 2024, Op. cit.

Reflections and Outlook

To turn shared risks into shared gains, it is crucial to focus on practical cooperation rather than new institutions: a joint HoA – Gulf water data and early-warning hub to standardize drought and flood alerts (the region is emerging from the most severe drought in 4 decades)²³⁶; a desalination & brine-management working group to trial lower-energy pilots and safer discharge, drawing on Gulf experience (the GCC hosts roughly 40 percent of global desalination capacity)²³⁷; and a skills & maintenance fund that trains local utilities, engineers, and meteorological teams on both shores. Start with two or three corridor pilots, port cities and their dry hinterlands, so that the benefits are visible: fewer water outages, quicker responses to shocks, and more predictable planning cycles for farmers and firms.

The first pillar involves trust-building and transparency. Establishing a Red Sea Water Data Portal would create a shared platform for collecting and disseminating information on river flows, aquifer levels, desalination output, and environmental impacts. By providing open access to reliable data, such a portal would reduce suspicions and build confidence.²³⁸ Data-driven early warning systems could also be established to mitigate the risks of drought and flood, providing governments with tools to respond more effectively²³⁹. Importantly, this shared data would empower HoA states to shape the agenda equally, reinforcing a more balanced partnership. Finally, establishing regional centres of excellence in water innovation and management, backed by multilateral partners, would enhance local research capacity, promote knowledge exchange between Gulf and East African institutions, and reduce reliance on external consultants.

The second pillar calls for institutionalizing water diplomacy. The Council of Red Sea and Gulf of Aden States should expand to include a dedicated Water & Climate Working Group, providing non-littoral states such as Ethiopia and South Sudan with observer status. This group could draft common standards, set guidelines for environmental impact assessments, and facilitate negotiation mechanisms such as electricity-for-water swaps to de-escalate conflicts like the Grand Ethiopian Renaissance Dam (GERD) dispute. Furthermore, partnerships with global institutions such as the United Nations and African Union could strengthen mediation and ensure compliance with agreed frameworks. By creating formal venues for negotiation, the influence of HoA states on decision-making increases substantially. Strengthening the Red Sea Council into a robust decision-making entity with binding water-allocation and conflict-resolution mechanisms remains key to long-term regional stability.

236. World Meteorological Organization, 2022, Op. cit.

237. African Development Bank, 2020, Op. cit.

238. World Bank, 2024, Op. cit.

239. Intergovernmental Panel on Climate Change, 2021, Op. cit.

The third pillar focuses on co-investment in resilient infrastructure. Priority areas include renewable energy-powered desalination hubs, with Djibouti included as a strategic centre due to its existing expertise, and the development of climate-resilient agro-corridors designed to retain 20 percent of harvests for local consumption²⁴⁰. Large-scale environmental restoration projects, such as the regeneration of mangroves and wetlands, would also protect coastlines and act as carbon sinks. Additional focus on community-based water harvesting systems, water recycling technologies, and decentralized energy systems would help ensure inclusive development that benefits both rural and urban populations.

240. African Development Bank, 2020, Op. cit.

Chapter 3

Land, Livelihoods and Leverage: Rethinking Gulf–Horn Ties

By *Nourah Shuaibi*

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Land, Livelihoods and Leverage: Rethinking Gulf–Horn Ties

Food security concerns are reshaping political and economic relations across the Red Sea, particularly between the GCC and the HoA. Saudi Arabia, the UAE, and Qatar have invested heavily in the HoA farmlands to secure food supplies²⁴¹. This trend reflects a growing interdependence shaped by climate fragility, demographic growth, and the strategic geography of the Red Sea.

These dynamics remain relevant as both regions face shared challenges: the GCC's limited agricultural capacity and the HoA's need for investment and infrastructure. Since the 2008 global food crisis, GCC states have invested in farmland, ports, and logistics in the HoA to secure food security, while Horn governments – especially Ethiopia, Sudan, and Somalia – have welcomed these as development opportunities.

This chapter argues that while food security interdependence between the GCC and the HoA has created mutual opportunities, it has also reinforced structural inequalities that risk making the relationship extractive rather than developmental. Whether these partnerships become more balanced will depend on how both sides manage power asymmetries, rivalries, and governance gaps. Accordingly, the chapter examines the evolving political economy of HoA-GCC relations through the lens of food security, highlighting areas of convergence, such as the alignment between Gulf food security agendas and the Horn's agricultural potential, as well as fault lines including land rights disputes and institutional fragility.

Current Scene

Food security became central to GCC foreign policy after the 2007-2008 food price crisis. Limited arable land and water scarcity force GCC states to import over 80 percent of their food needs.²⁴² In response to global supply chain shocks, and constrained by limited domestic land resources, these states have adopted a dual track approach evident in their national visions: on the one hand, investing in domestic agricultural technology, like in the case of Saudi Arabia's financing through its Agricultural Development Fund to local farmers supporting more than 60,000 local projects;²⁴³ and, on the other hand, securing farmland and food supplies from abroad, particularly from the HoA. This region, with its vast tracts of fertile land, access to fresh water sources, and proximity to the Gulf, has become a key target for these investments. Sudan, Ethiopia, and Somalia stand out as the Horn countries most deeply engaged with Gulf food security initiatives, attracting the largest share of land leases and related infrastructure projects.

Over the past two decades, Gulf countries have leased millions of acres in these states²⁴⁴ to cultivate crops such as sesame, sorghum, wheat, and oilseeds²⁴⁵, while maintaining Somalia as a major supplier of livestock for Gulf markets, especially during religious festivals when

241. Sara Nowacka, "GCC Countries, Seeking Food Security, Eye Agricultural Investments," Policy Paper (Warsaw: Polish Institute of International Affairs, 2022).

242. Zaid M. Belbagi, "GCC States' Prudent Food Security Investments," Arab News, 21 February 2025.

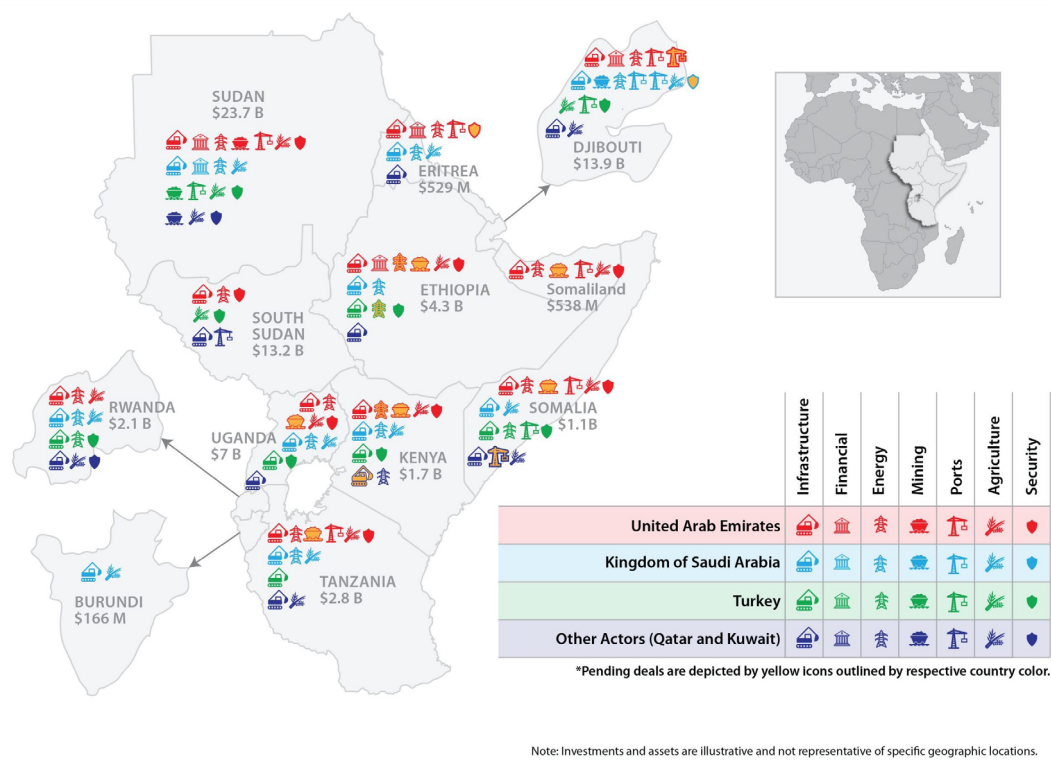
243. Ibidem.

244. Land Matrix Global Observatory. (n.d.) Land Matrix Database. <https://landmatrix.org>

245. World Bank Group, "Sudan: Agriculture Value Chain Analysis," Report (Washington, DC: Agriculture Global Practice, Finance, Competitiveness and Innovation Global Practice, 2020).

sacrificial trade peaks.²⁴⁶ To facilitate these exports, GCC investors have funded strategic transport corridors and port infrastructure,²⁴⁷ including the UAE-backed development of Berbera Port in Somaliland, the Bosaso Port in Puntland, and the Lamu Port-South Sudan-Ethiopia Transport (LAPSSET) corridor in Kenya. These facilities not only enhance the movement of agricultural goods but also position Gulf countries as critical players in the Horn’s logistics and trade networks.

Figure 7: Gulf Investments in the HoA



Taken from Africa Centre for Strategic Studies website²⁴⁸

This picture is further complicated by the expanding involvement of external actors such as Turkey and China, whose growing presence is reshaping the HoA’s development landscape. Although neither country is as deeply involved in land acquisition or food production as the GCC states, their broader engagement challenges Gulf dominance, while diversifying it by introducing both competition and leverage for Horn states. China, for instance, has financed and built critical infrastructure such as Ethiopia’s Addis Ababa–Djibouti railway, enhancing regional trade and giving the HoA governments more negotiating power with Gulf investors.²⁴⁹ Turkey, meanwhile, has deepened its influence through agricultural aid programmes and development projects, particularly in Somalia, where it has also constructed hospitals and schools alongside its military base and port

246. SPARC, “Rapid Assessment of the Impact of the Restricted Hajj 2020 on Livestock Exports from Somalia and Neighbouring Countries, and Implications for FCDO in Somalia Programming,” Technical Report (London: Supporting Pastoralism and Agriculture in Recurrent and Protracted Crises [SPARC], 2020); Ahmed Khalif, “Why a Quiet Hajj Is Hurting Somalia,” Foreign Policy, 29 July 2020.

247. David Pilling, Chloe Cornish and Andres Schipani, “The UAE’s Rising Influence in Africa,” Financial Times, 30 May 2024.

248. Africa Center for Strategic Studies, “Mapping Gulf State Actors’ Expanding Engagement in East Africa,” Infographic (Washington, DC: Africa Center for Strategic Studies, July 2025).

249. Noah Bonevizer, “China Hands Over Control of Ethiopia–Djibouti Railway,” Railway Technology, 26 January 2024.

operations in Mogadishu.²⁵⁰ These engagements complicate the strategic calculus of GCC countries, prompting them to offer more favourable investment terms and pursue deeper political ties to maintain influence over the HoA.

Interests and Intersections

At first glance, the partnership between the HoA and the GCC appears symbiotic, reflecting a convergence of strategic interests. Each side addresses a critical need of the other: the Gulf states gain a measure of food security and investment diversification, while African partners receive capital inflows and economic opportunities. Long-term leases and joint ventures in Africa allow Gulf countries to control supply chains, ensuring direct allocation of a portion of grain or livestock for their populations. Fertile African lands act as offshore food sources for the GCC. Gulf agribusinesses such as Saudi's Almarai have expanded exports through foreign fodder farms, boosting regional food supply and Gulf market reach.²⁵¹ Such moves position the GCC as a growing player in agro-food industries.

For the HoA countries, foreign agricultural investments have the potential to create jobs, upgrade technology, and improve infrastructure in rural areas. In Ethiopia, which has been a major destination for Gulf agribusiness, an estimated 300,000 jobs were generated by foreign land deals between 2000 and 2017.²⁵² Saudi-backed farms in Ethiopia built roads that connected remote areas to markets, benefiting local farmers.²⁵³ Moreover, in Sudan, partnerships with Gulf investors promised not only large-scale farming projects but also supplementary developments such as free trade zones and profit-sharing arrangements that could increase public revenues.²⁵⁴

Despite these areas of convergence, significant fault lines undermine the long-term sustainability and inclusiveness of these partnerships. One major area of concern is land rights and the impact of large-scale land acquisitions on local populations. Deals struck at the national or elite level often sideline smallholder farmers and pastoralists on the ground, sparking unrest with what is known as “land grabbing”. For instance, in Ethiopia, local anger over foreign land deals led to the 2016 protests, including the burning of a foreign farm facility.²⁵⁵ Similar tensions have surfaced in Sudan, where more than 450,000 acres in the historic El Gezira agricultural scheme were leased to foreign investors on 99-year terms, triggering protests and deepening grievances among displaced farming communities.²⁵⁶

Another major fault line is the disconnect between large-scale agricultural exports and persistent local food insecurity in Horn countries. Gulf investments in the HoA are indeed primarily aimed at securing food supplies for their own populations, often resulting in

250. Mohammed Dhaysane, “Projects in Somalia Based on Win-Win Development: Turkish State Agency,” Anadolu Agency, 13 February 2022.

251. Sara Nowacka, 2022, Op. cit.

252. Meester, J., van den Berg, W., & Verhoeven, H. (2018) p.51. Riyal politik: The political economy of Gulf investments in the HoA. Clingendael Institute.

253. William Davison, “Saudi Billionaire to Invest USD 100 Million in Ethiopian Farm,” Bloomberg, 3 December 2014; Saad Al-Asmari, “Saudi Investors Leave Ethiopia,” Farmland Grab, 2013.

254. Siham El Obeid, “Gulf States: A Paradoxical Economic Lifeline for Sudan,” Report (Paris: French Institute of International Relations [Ifri], 2024); Sudan Tribune, “Sudan Scraps USD 6 Billion UAE Port Deal, Citing RSF Support,” 3 November 2024.

255. Redie Bereketab, Liisa Laakso and Ahmed Abu Hatab, “A New Era of Engagement: Gulf Countries and the HoA,” Nordic Africa Institute, 20 September 2024.

256. Farmland Grab, “Farmers of Sudan’s El Gezira Agricultural Scheme Discuss Unionising,” 2022.

deals that prioritize exports over local needs. This leads to a troubling paradox: fertile land in countries like Ethiopia and Sudan is used to feed people abroad, while many local communities continue to face hunger, especially during droughts or conflict.²⁵⁷ The risk is that short-term commercial objectives could trump long-term local food security, unless projects are deliberately structured to share output or invest in local agriculture beyond export-oriented interests. This disparity is reflected in comparative indicators of food security and hunger across both regions (see Tables 1 and 2).

Table 2: Food Security Index: Country Comparison 2022²⁵⁸

GCC Country	Food Security Index Overall 2022 ((scale of 100	Horn Country	Food Security Index Overall (2022 (scale of 100
UAE	75.2	Kenya	53
Qatar	72.4	Ethiopia	44.5
Oman	71.2	Sudan	42.8
Bahrain	70.3	Eritrea	–
Saudi Arabia	69.9	Djibouti	–
Kuwait	65.2	Somalia	–

Table 3: Food Hunger Index: Country Comparison 2024²⁵⁹

GCC Country	Global Hunger Index 2024 (out of (127 countries	Horn Country	Global Hunger Index 2024 (out (of 127 countries
UAE	22nd–1	Kenya	100th
Qatar	–	Ethiopia	102nd
Oman	51st	Sudan	110th
Bahrain	–	Eritrea	–
Saudi Arabia	37th	Djibouti	92nd
Kuwait	22nd–1	Somalia	127th

Environmental degradation is a further source of friction. Poorly managed Gulf-led farming can deplete water and degrade soil and biodiversity²⁶⁰. The Nile basin is a case in point: Gulf-funded irrigation projects in Sudan or Ethiopia have raised concerns in downstream countries such as Egypt, linking these deals to wider geopolitical disputes over Nile water. Beyond the Nile, Ethiopia’s Gibe III dam disrupted flood cycles in the Omo Valley,

257. Redie Bereketeab, Liisa Laakso and Ahmed Abu Hatab, “A New Era of Engagement: Gulf Countries and the HoA,” Nordic Africa Institute, 20 September 2024.

258. Global Book Security Index 2022. <https://impact.economist.com/sustainability/project/food-security-index/>

259. Global Hunger Index. <https://www.globalhungerindex.org>

260. Redie Bereketeab, Liisa Laakso and Ahmed Abu Hatab, “A New Era of Engagement: Gulf Countries and the HoA,” Nordic Africa Institute, 20 September 2024.

displacing agro-pastoralists and fuelling unrest that spilled over to Kenya.²⁶¹ Political instability and conflict in the HoA undermine the predictability and security of foreign investments, further complicating partnerships. In Somalia, the central government's fraught relations with regional states have undermined the livestock sector and disrupted Gulf-aligned trade flows.²⁶² In 2016, UAE's DP World struck a Berbera Port deal with Somaliland, sparking protests from Somalia's central government and raising sovereignty concerns.²⁶³ These were exacerbated when the UAE began constructing a military base in Berbera, prompting Somalia's UN ambassador to call for international intervention and denounce the move as a violation of sovereignty.²⁶⁴ Though strategic in nature, these port and infrastructure developments are also tied to Gulf efforts to secure food supply chains.

Crucially, HoA countries are not merely passive arenas for external powers – they exercise agency and strategy in managing Gulf relationships. Long dependent on Djibouti for sea access, Ethiopia sought to diversify by attracting Gulf investments. Officials reportedly welcomed the UAE's involvement in Berbera, viewing it as preferable to ceding control to rival neighbours.²⁶⁵ By securing a 19 percent stake in the port project, Ethiopia ensured influence over port governance and access to export routes.²⁶⁶ At the same time, Addis Ababa maintained open channels, pursuing memoranda with Somalia and negotiating access through Sudan and Kenya on port and corridor initiatives, thereby avoiding over-reliance on any single player.²⁶⁷

Sudan, too, has demonstrated agency by recalibrating partnerships in response to domestic upheaval and shifting political calculations. Under President Omar al-Bashir, Sudan leaned heavily on Gulf support, granting land and port concessions in exchange for financial aid amid international isolation. However, persistent instability and military fragmentation derailed follow through: in 2023, Sudan cancelled a USD6 billion UAE-backed port and agriculture package amid growing tensions between rival security factions and fears of foreign influence over critical infrastructure.²⁶⁸ These cases show how Horn leaders use Gulf competition to extract short-term gains, but domestic instability and fragmented authority often constrain the long-term viability of food security partnerships.

Outlook

The future of HoA–GCC relations in food security pivots on whether both sides can shift from transactional deals to long-term, equitable partnerships. Experts and policy observers²⁶⁹ increasingly recognize that short-term, extractive approaches pose economic, environmental, and political risks – evident in local pushback and the cautious stance of Horn governments seeking to preserve agency. Without improved transparency or greater political stability, partnerships may remain fragile, deepening inequality and fuelling local

261. Human Rights Watch, "Ethiopia: Dams, Plantations a Threat to Kenyans," 14 February 2017.

262. Goobjoog News, "Al-Shabaab Threat Slowing Down Growth in Key Sectors in Somalia, Minister Says," 8 May 2024.

263. Middle East Monitor, "Somalia Rejects UAE's Port Deal with Ethiopia, Somaliland," 5 March 2018.

264. Al Jazeera, "Somalia Calls for UN Action Against UAE Base in Berbera," 27 March 2018.

265. Mebratu Gebru, "UAE Engagement in Ethiopia: Between Investment and Influence," Policy Brief No. 35 (Berlin: Stiftung Wissenschaft und Politik [SWP], 2023).

266. Reuters, "Ethiopia Acquires Stake to Join DP World, Somaliland Port Venture," 1 March 2018.

267. Yahia H. Zoubir, "The Gulf and the HoA: Investing in Security," Middle East Council on Global Affairs, 11 December 2024.

268. Sudan Tribune, "Sudan Scraps USD 6 Billion UAE Port Deal, Citing RSF Support," 3 November 2024.

269. Meester, Jos, Willem van den Berg, Harry Verhoeven, 2018, Op. cit.

tensions. This dual possibility frames the core challenge: how to deepen existing areas of convergence while mitigating structural fault lines?

Progress Requires Action Along Three Policy Lines

First, transparency and inclusivity in negotiations must improve. HoA governments should engage local stakeholders in land-lease and investment decisions, ensuring land rights and embedding social safeguards. Clear legal frameworks – covering fair compensation, environmental regulations, and clauses securing local markets – can make agreements more resilient. GCC investors, in turn, should adopt responsible investment standards and treat host communities as long-term partners.

Second, aligning Gulf-backed investments with host countries' development plans is critical. When foreign investments support national food security strategies, mutual benefits increase. Gulf-funding for climate-resilient agriculture, irrigation, or agribusiness hubs can benefit both export and domestic productivity goals. Technology transfer should be prioritized, especially when implemented through joint ventures with local actors.

Third, mitigating rivalries requires multilateral risk-sharing and conflict sensitivity. Flexible agreements should allow host countries to retain part of the harvest in crises. Risk-sharing mechanisms – such as crop insurance schemes or adaptive infrastructure – can reduce vulnerability and build trust.²⁷⁰ Politically, GCC states also benefit from a stable HoA. Avoiding zero-sum rivalries and supporting African-led solutions will strengthen trust, particularly if Gulf states coordinate their investments through joint mechanisms or engage existing African frameworks such as IGAD to align priorities. African Continental Free Trade Area platforms also offer Horn countries a means to assert greater bargaining power. Similarly, the presence of non-Gulf external actors like China and Turkey should be approached strategically, with Horn states leveraging their engagement to diversify partnerships, balance power asymmetries, and negotiate more favourable terms.

270. Sonia Plaza and Carolina Cerruti, "How Drought Insurance and Value Chains Can Support Somalia's Livestock Economy," World Bank Blogs (blog), 3 October 2022.

Chapter 4

Securing Development Cooperation: The Economic Nexus Between Saudi Arabia and the Horn of Africa

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Securing Development Cooperation: The Economic Nexus Between Saudi Arabia and the Horn of Africa

Saudi Arabia and HoA countries have long shared overlapping interests and reciprocal influences. The Red Sea functions as the connective tissue fusing together many Middle Eastern and HoA countries, while the waterway likewise plays a pivotal role in the global economy. It is unsurprising, then, that Saudi Arabia sought to establish the Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden as well as base the entity in Riyadh. Saudi foreign minister Prince Faisal bin Farhan bin Abdullah described that the council's objective as involving "development in a way that achieves prosperity for all our countries,"²⁷¹ though the council has yet to deliver on its stated policy intentions.²⁷² Past Saudi – and wider Gulf – engagement in the HoA region often focused upon countering Iranian influence and enhancing economic and food security through land acquisitions. Issues related to migration, religious affairs, and counterterrorism efforts have encouraged cooperation across other areas too.

These established contours of relations can still help to explain interregional linkages, but new regional forces are at play. Israel's stunning military operations against Iran-aligned proxies and Iran itself in the aftermath of Hamas' deadly attacks in October 2023 have significantly diminished threat perceptions associated with Iran's regional influence.²⁷³ Gulf Arab governments like Saudi Arabia and the UAE are simultaneously focused on mobilizing and deploying capital locally to meet the growing needs and ambitions of their domestic economies. Moreover, US cuts to foreign assistance under the second Trump administration may push HoA countries to deepen and expand partnerships with other actors that have a vested interest in their region.

New and deeper collaborations that transform relations between the Gulf and HoA are unlikely to materialize on a multilateral level – at least over the short and medium terms. Rather, bilateral exchanges will drive Gulf-HoA economic cooperation with the potential for meso- and project-level interactions to increase as ties deepen. The ambitious economic and social transformation agenda pursued by Saudi Crown Prince Mohammed bin Salman (MbS) introduced a new enabling factor into the Red Sea arena: expansive, luxury-focused development projects. Saudi government planners hope gigaprojects such as Neom and the Red Sea Global will redefine development paradigms along the country's western coast and help to diversify the country's economy in the process. Evolving security dynamics in HoA countries have the potential to impact how these Saudi development processes unfold and their longer-term commercial viability.

271. Saudi Press Agency, "Foreign Minister: The Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden Is a Joint Action System for Coordination and Cooperation," 6 January 2020.

272. Nasr Al Ali, "Formation and Purposes of Arab and African Coastal States of the Red Sea and Gulf of Aden," MA Thesis (Abu Dhabi: Khalifa University, 2022).

273. The defanging of Hezbollah in Lebanon and the collapse of Bashar Al Assad's regime in Syria reflected two broken pillars of Iran's "axis of resistance," but there are even reports of declining Iranian influence in Iraq – a long-standing bastion of Iranian influence. See: The Economist, "Iran Is Losing Its Stranglehold over Iraq," 13 July 2025.

A renewed and ambitious approach to development on Saudi Arabia's western coast likewise presents new incentives and opportunities for economic engagement exchanges with various actors in HoA. This chapter provides an overview of the key structural dimensions of Saudi-HoA economic relations and incorporates a development project-focused lens. The resulting work depicts the associated bidirectional linkages and drivers of exchange related to a rapidly commercializing Red Sea coastline. This geographically delineated development focus treats Saudi Arabia not just as a national entity but also as composed of various subnational units with potential significance to the HoA and vice versa.

Rightsizing the Development Fit

Saudi Arabia is the only GCC state with a coastline on the Red Sea. Saudi officials plan to utilize this expansive coastline as part of their ambitious social and economic transformation agenda taking place under Vision 2030. Most of Saudi Arabia's oil fields are in the country's Eastern Province, and the capital of Riyadh remains the key focus area for development priorities. Yet Saudi Arabia's western coast has enjoyed a wave of economic momentum, complete with luxury hotels, yacht-focused islands, and other experimental development projects since Vision 2030 emerged in 2016. These new initiatives launched under Crown Prince MbS build on Jeddah's historic role as a commercial hub and on strong religious significance, as the home of Mecca and Medina. As Saudi Arabia's Vision 2030 – along with subsequent visions – and economic diversification plans continue to unfold, realizing the economic potential of Saudi Arabia's western coastline will become increasingly important for Saudi leadership.

Where, then, do HoA countries fit into Saudi Arabia's evolving Red Sea strategy? So far, despite their geographic proximity, they have not represented a top priority for Riyadh, as reflected in the limited scale and composition of bilateral trade. In 2023, Saudi Arabia's bilateral trade with regional states remained lacklustre: Ethiopia (USD1.434 billion), Sudan (USD1.212 billion), Kenya (USD1.050 billion), Djibouti (USD547.3 million), and Somalia (USD327.9 million),²⁷⁴ while trade exchanges with Eritrea and South Sudan were minimal. The primary dimension of Saudi export flows to regional states largely involved refined petroleum, which featured prominently in bilateral trade with Ethiopia, Kenya, and Somalia and periodically in certain years with other HoA countries. As for exports from HoA states to Saudi Arabia, sheep and goats accounted for a majority of the value of goods coming from Sudan, Djibouti, and Somalia. Coffee, cut flowers, and tea were likewise important exports from Ethiopia and Kenya to Saudi Arabia. Trade between Saudi Arabia and HoA countries did not grow substantially in the decade between 2013–23, leaving room for growth but also suggesting limited economic complementarities and the persistence of trade barriers.²⁷⁵

While trade ties remain important for forming commercial linkages between Saudi business actors and those in the HoA, it is in the investment domain where more consequential connections are emerging. In this context, the Saudi Public Investment Fund (PIF), the country's sovereign wealth fund, plays a pivotal role, serving as what has been described

274. These figures reflect total bilateral trade consisting of imports and exports. All trade figures are sourced from the Observatory of Economic Complexity.

275. Ibidem.

as “the crown prince’s [MbS] most important instrument for capturing new markets in Africa”.²⁷⁶ In 2022, PIF established a regional investment office in Sudan, along with several other regional investment offices in Middle East and North African countries.²⁷⁷ The initial Saudi investment pledge of USD3 billion reportedly targeted Sudanese infrastructure, real estate, mining, healthcare, food and agriculture, manufacturing and technology.²⁷⁸ It is unclear how much of this 2022 investment commitment announced following a meeting between General Abdel Fattah al-Burhan and Crown Prince MbS has materialized, given ongoing conflict in the country. Still, cumulative Saudi investment in Sudan over the two decades prior to 2022 have been estimated at roughly USD35.7 billion.²⁷⁹

Other HoA countries beyond Sudan also remain on Saudi Arabia’s economic radar. A notable example is Kenya. During his 2023 visit to Nairobi, Crown Prince MbS remarked in discussion with President William Ruto that Saudi Arabia has “to pay closer attention” to Kenya, defining it as “a country with a tremendous future”.²⁸⁰ In February 2025, a Saudi delegation visited Kenya to explore opportunities associated with the Lamu Port project and other investment prospects.²⁸¹ The Saudi and Kenyan chambers of commerce also agreed to establish a joint Saudi-Kenyan business council during the visit. Overall, a steady and gradual approach to growing economic cooperation between Saudi Arabia and HoA countries is a reasonable path forward, given the ongoing Saudi need for fiscal sustainability amid subdued oil prices.

In addition to the investment domain, the movement of visitors, longer-term residents (including labour migrants), skilled professionals, and individual investors from HoA countries to Saudi Arabia represents another potential avenue for convergence, especially around development projects. The high-profile projects on Saudi Arabia’s Red Sea coast are mixed-use developments combining entertainment, residential, and commercial components. Many of these projects have a pronounced luxury dimension to these projects, reflecting Saudi efforts to attract more high-net-worth individuals to the Kingdom. While HoA countries are not known as global wealth hubs, both Kenya and Ethiopia are among the top 10 wealthiest countries in Africa in terms of millionaire composition. As of December 2023, Kenya had approximately 7,200 individuals with at least USD1 million in liquid assets, while Ethiopia had an estimated 2,700 millionaires. Both countries witnessed a 30 percent increase in their millionaire populations between 2013 and 2023, suggesting some scope for alignment with Saudi Arabia’s upscale investment and real estate ambitions.²⁸²

Another potential alignment might lie in Saudi Arabia’s growing demand for foreign skilled professionals from diverse backgrounds to support its expanding development projects. For instance, in December 2024, Saudi Arabia and Somalia signed agreements to strengthen labour cooperation concerning both Somali professionals and domestic workers.²⁸³ However, the higher-skilled professional opportunities constitute only a fraction of the labour flows

276. Sebastian Sons, “Between Power Projection and Regional Rivalries: Saudi Arabia’s Engagement in the HoA,” Policy Brief No. 10 (Berlin: Stiftung Wissenschaft und Politik [SWP], December 2022), 5–6.

277. Public Investment Fund, “His Royal Highness the Crown Prince Announces That the PIF Will Establish Five Regional Investment Companies,” Press Release (Riyadh: Public Investment Fund, 26 October 2022).

278. Sudan Tribune, “Saudi Arabia to Invest USD 3 Billion in Sudan,” 7 November 2022.

279. Fatehelrahman Yousif, “Saudi Arabia, UAE Top Gulf Investments in the HoA,” Asharq Al-Awsat, 5 April 2022.

280. African Business, “Saudi to Invest More in Kenya,” 25 October 2023.

281. Saudi Press Agency, “Saudi Delegation Explores Investment Opportunities, Trade Partnerships in Kenya,” 11 February 2025.

282. Henley & Partners, “Top 10 Wealthiest Countries in Africa,” The Africa Wealth Report 2024 (London: Henley & Partners, 2024).

283. Zawya, “Saudi Arabia and Somalia Sign Agreements to Strengthen Labor Cooperation,” 11 December 2024.

from HoA countries. Recent estimates suggested that around 400,000 Ethiopian women work across the Middle East, predominantly as domestic workers.²⁸⁴ Meanwhile, there were 819,600 Sudanese migrants in Saudi Arabia according to the country's 2022 census.²⁸⁵

Diminishing flows of foreign assistance from the US under the second Trump administration could exert a heavy toll on HoA countries. In 2023, HoA countries received approximately 8 percent of the USD72 billion of US international aid.²⁸⁶ The US accounted for around half or more of all external assistance received by several HoA countries: Sudan (48 percent), South Sudan (52 percent), Somalia (52 percent), and Ethiopia (60 percent).²⁸⁷ The drying up of US humanitarian aid and other forms of support will leave a major gap to be filled. Gulf countries like Saudi Arabia possess a natural foundation of engagement to build upon here. Arab Gulf states collectively invested USD13 billion and provided official development assistance of USD6.6 billion from 2000-17.²⁸⁸ Yet in more recent years, Gulf Arab governments have adopted a more stringent approach to economic aid and support – one prioritizing (mutually) beneficially investment opportunities.

New and growing external assistance needs in HoA states are likely to provide a continued platform for engagement between Saudi Arabia and the other shore of the Red Sea. Saudi government officials and planners may find several reasons to play a greater role in addressing these needs – chief among them, the desire to ensure that their expensive development projects and other economic activities unfolding across the Red Sea can proceed without disruption. However, the direct participation of economic actors from HoA countries, whether firms or individuals, in Saudi development projects remains limited and difficult to identify at this stage.

This obscurity partially reflects the fluid of Saudi Arabia's own development agenda, as many flagship projects continue to change and evolve.²⁸⁹ Reports of a strategic review of The Line – a futuristic city within the Neom megaproject – is just the latest indication of reassessments and priority shifts associated with the sovereign wealth fund-owned development project.²⁹⁰ This tendency to change is closely linked to oil price fluctuations and foreign direct investment trends, which remain key factors in affecting the available funding and thus shaping the trajectory of Saudi development trends. As a result, in the short and medium term, the Saudi government expects to function as the primary financier for many major development projects but hopes to shift toward private and foreign investment over time to ensure fiscal sustainability of these initiatives. Global trends also matter. A strong environmental and sustainability thread weaves through many of the Saudi development projects along the Red Sea, but the continued importance of these project dimensions is unclear, given indications of global shifts away from Environmental, Social, and Governance (ESG) investing and initiatives.

284. Tirsit Beyene, "Labor Migration of Ethiopian Women to the Middle East," Friedrich Ebert Stiftung, 26 June 2025.

285. Noor Elfaki, Hafeia Abdelgyoum and Ala Elhelali, "Factors Influencing Health-Seeking Behavior among Sudanese Immigrants in Saudi Arabia," BMC Public Health 24 (2024): 1666.

286. Corrado Cok, "US Aid Freeze: A Catastrophe Looming for the HoA," European Council on Foreign Relations, 21 February 2025.

287. Corrado Cok, 2025, Op. cit.

288. Kouassi Yeboua and Jakkie Cilliers, 2021, Op. cit.

289. For more context, see my piece on Neom's various stages of development and its evolution into a destination of destinations: Robert Mogielnicki, "Neom is becoming a destination of destinations," Arab Gulf States Institute, 26 January 2024.

290. Zainab Fattah, Abeer Abu Omar, and Christine Burke, "Saudi Arabia Taps Consultants to Review Neom's 'Line' Project," Bloomberg, 14 July 2025.

On the Red Sea Horizon

Other Gulf states are active participants across the Red Sea arena. The UAE serves as an interesting case study for consideration alongside that of Saudi Arabia. The geographic distance between the HoA and Emirati soil influences the nature of Emirati economic engagement in the region. Emirati commercial power projection materializes through economic strategies, like Comprehensive Economic Partnership Agreements (CEPAs), which the UAE inked with Kenya in January 2025. Massive Emirati investment pledges in African countries over recent years (USD97 billion in 2022-23) have exceeded those of China and the US,²⁹¹ and Emirati energy firms are active global players. The UAE also benefits from major multinational logistics and port companies, such as DP World and Abu Dhabi Ports, which advance strategic port and free zone projects. Not all the joint development projects have gone as planned. Dubai-based DP World has fought a prolonged legal battle with the government of Djibouti over the concession for the Doraleh Container Terminal.²⁹²

Echoes of competitive friction between the UAE and Saudi Arabia can be heard across the Red Sea. In June 2024, Saudi investors signed a 92-year contract for establishing a Saudi Logistics City in the Djibouti Port Free Zone, though ministers of investment from Saudi Arabia and Djibouti also signed an investment protection agreement later in the year.²⁹³ Indeed, Saudi economic development strategy under Vision 2030 aims for the country to become a global hub for logistics, aviation, tourism, and entertainment, among other sectors. These areas of economic activity – whether new logistics hubs or tourism destinations – possess direct relevance for the Red Sea arena but also rub up against the UAE's established presence in these domains. The Saudis have also launched a regional headquarters program to encourage more multinational firms to establish and expand their commercial presence in the country. Larger firms and investors from HoA countries interested in the Gulf market will need to think carefully about how to structure their regional operations and investment priorities.

For now, a useful analytical needle threading together the national and development project-level discourses on Saudi Arabia-HoA economic relations involves the enabling commercial entities like the Saudi sovereign wealth fund, which oversees both domestic development initiatives and investments abroad. With its domestic gigaprojects on the Red Sea coast and global presence, the PIF is a natural economic bridge to and from Saudi Arabia, though HoA countries are not yet priority international investment destinations for the fund. The Jeddah Islamic Port and King Abdullah Port, which have suffered from declining vessel calls and cargo volumes due to Houthi attacks, are other entities enabling connectivity across the Red Sea.

It is likely that many government and business actors from across the Red Sea hope for Saudi development activities to serve as a rising tide. Some governments will seek to attract more and diversified Saudi investments and other forms of economic exchange, while others may set their sights on receiving an economic life raft. But there will be plenty of challenges and competition to be the boat that floats highest – or at all.

291. Not all pledged investments or announcements are likely to materialize, but the scale of investment intentions is impressive. See: Patricia Cohn, "UAE is pouring money into Africa, seeking resource and power," *New York Times*, 17 May 2025.

292. PR Newswire, "DP World: US Court Enforces USD 200 Million Award Against Government of Djibouti over Illegal Port Seizure," 31 July 2024,

293. Reem Walid, "Saudi Arabia, Djibouti Ink Deal to Protect Mutual Investments," *Arab News*, 27 December 2024.

Chapter 5

Two Shores, One Shared Prosperity Opportunity: Development and Security

By *Asma Mohamed Ahmed*

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Two Shores, One Shared Prosperity Opportunity: Development and Security

The Arabian Peninsula and the HoA converge at one of the world's most strategic seas, presenting an underutilized opportunity for regional cooperation. Their intertwined geography and historical ties show potential for economic complementarity, offering optimism for enhanced collaboration. However, Gulf-Horn relations are complex and shaped by rivalries, internal conflicts, and divergent interests, underscoring the need for a new strategy focused on sustainable stability, economic integration, and pragmatic diplomacy.

This chapter examines the relationship between Saudi Arabia and Djibouti within a broader context, highlighting the necessity for balanced, inclusive policies that maximize mutual benefits while managing risks. Saudi Arabia is Djibouti's third import trade partner with 15 percent of its total imports which represents 900 million USD²⁹⁴. Both nations have developed long-term visions aimed at economic growth; Djibouti's Vision 2035²⁹⁵ seeks to capitalise on its strategic location as a trade and logistics hub, while Saudi Vision 2030²⁹⁶ aims to develop new industries and expand its role as a Red Sea trade hub. Djibouti serves as a stable entry point for Saudi Arabia to extend its influence and strengthen its ties with the region.

This chapter argues that private sector dynamics are central to Gulf-Horn relations, and shape both opportunities and asymmetries. A balanced regionalism requires embedding these actors in cooperative frameworks. The chapter also argues that public-private partnerships and infrastructure investments foster positive interdependence, connecting the region's geopolitical strategies and diverse interests.

Security and Economic Trends

Security interdependence, whether maritime security, risks of conflict spillovers, or the impact of competing alliances and rivalries, binds the Red Sea region. On one shore, the HoA countries go towards diverse trajectories and the area presents a complex mix of growth, fragility, and internal conflict affecting regional dynamics. And on the other, the Gulf monarchies demonstrate competing agendas and rivalries. Since the area is fragile and prone to instability, the overlapping alliances could trigger and fuel other regional conflicts.

There is a significant strategic relevance in the HoA for Gulf states, which naturally include the trade routes and the agricultural supply chains. These incentives foster the level of involvement of Gulf states in the region. However, the economic agency among the various regional actors is unequally shared, creating a form of regional engagement that appears cooperative yet hierarchical in structure.

294. Volza, "Top Import Trading Partners of Djibouti," Volza Global Trade Data, June 17, 2025-

295. Republic of Djibouti, Vision Djibouti 2035. Djibouti City: Ministry of Economy and Finance, 2014.

296. Kingdom of Saudi Arabia, 2016, Op. cit.

The HoA, as a proxy arena for Gulf wealth powers with competing agendas, is also exemplified by the Qatari-Turkish alliance,²⁹⁷ which share strong ties with Mogadishu, and the Emiratis, who have strengthened economic relations with the secessionist state of Somaliland. Eventually, the growing alignment of HoA countries with rival Gulf powers raises the risk of polarisation and the aggravation of the existing instability.²⁹⁸

An example of a country that demonstrates the dynamics observed in the region, which is the balancing of competing interests, is Djibouti, a politically stable and economically pragmatic country. It has positioned itself as a platform for multilateral engagement while upholding a diplomacy rooted in neutrality.²⁹⁹ The geopolitical dynamics at play in Djibouti include on one hand, China's footprints through the BRI projects which add further complexity, with investments complementing or competing with Gulf projects.³⁰⁰ On the other hand, western powers maintaining a security focus, with Djibouti hosting multiple foreign military bases and troops. Amid these competing interests and foreign engagements, Djibouti employs diplomatic realism to maintain a balanced, non-aligned stance in regional conflicts, for example by refusing to participate in military operations against Yemen or by formally requesting that its allies not launch any military actions from its sovereign territory.³⁰¹ Similarly, during the 2017 Gulf crisis Djibouti chose to downgrade but not sever its ties with Qatar.³⁰²

The horizontal divide between the Gulf states, particularly Saudi Arabia, and HoA countries, such as Djibouti, illustrates two different security and economic paradigms. Since global trade, energy corridors and regional power ambitions converge in the Red Sea, Saudi Arabia sees it and engages with it mainly through the lens of security and soft power. To grow its influence, the kingdom is consolidating its involvement and presence in the Horn through economic investments, military partnerships, and soft power diplomacy.³⁰³ In contrast, Djibouti sees the Red Sea as a lifeline for its economy, FDI-generated revenue, and geopolitical relevance. These divergent perceptions inform the nature and pace of regional cooperation. Saudi Arabia, for instance, is more concerned with strategic competition and external influence notably Iranian involvement in Yemen, whereas Djibouti prioritises internal resilience and economic sustainability. The private sector deepens this asymmetry.

Private sector operators in Gulf states exert soft power and influence as an extension of their governments' geopolitical strategies. They have capital and thus the upper hand in negotiations, which gives them leverage in the places where they invest. Indeed, while these economic involvements generate revenue and foster regional connectivity, they also create situations of imbalance and financial dependency, which can limit local private sector development and

297. Nordic Africa Institute, "A New Era of Engagement: Gulf Countries and the HoA," Stories and Events, Nordic Africa Institute, September 20, 2024.

298. Ibidem.

299. Mohamud, Hussein. "Djibouti's Strategic Gamble: Building Alliances and Hubs in the HoA." International Policy Digest, April 2, 2024.

300. Vertin, Zach. Red Sea Rivalries: The Gulf States Are Playing a Dangerous Game in the HoA. Washington, DC: Brookings Institution, 2019.

301. Al Mayadeen English. "Djibouti Not to Partake in US-Led Naval Coalition Against Yemen." Al Mayadeen, 2024.

302. Gulf News, "Djibouti Downgrades Qatar Relations," Gulf News, June 8, 2017.

303. Gulf Research Center, "Ports, Power, and Proxy Wars: GCC," Commentary & Analysis, June 10, 2025, Gulf Research Center, accessed August 15, 2025.

accentuate its struggles to compete. An example of the type of dynamics that are observed is the one demonstrated by the Emirati company DP World in Somaliland, which has a 30-year concession to operate the port of Berbera.³⁰⁴ The investments, worth over 442 million USD, has reinforced the UAE's influence over the major trade route on the Red Sea.

Investing states get longer-term financial benefits. For example, a wealthy state may fund infrastructure in a less affluent state, gaining influence over bilateral economic relations. When DP World first secured the concession in 2017 and during the first years, it owned 51 percent of the stakes, while Somaliland held 30 percent and Ethiopia the remaining 19 percent.³⁰⁵ In 2022, Ethiopia withdrew from the project, and DP World took an additional 14 percent while the Somaliland Port Authority gained 4 percent.³⁰⁶ This brought DP World's total share to 65 percent, leaving 34 percent for the Somaliland government. For Somaliland, the project brings economic growth, infrastructure development, and competitiveness even though it has limited decision-making power. For the UAE, it strengthens regional influence, secures a key position along the strategic Red Sea trade route, and expands its presence and interests in the HoA.³⁰⁷

Such dynamics create inequities in Gulf-Horn relations, highlighting the need for a more equitable framework for regional cooperation.

Toward a Balanced Security-Economic Regionalism and Potential Fault Lines

Bridging this horizontal divide requires recognising that economic and security cooperation are intertwined. For the Red Sea to evolve from a fragmented area into a cohesive economic region, cooperation frameworks must reflect the needs and capabilities of all the involved states on both sides of the Red Sea. For instance, institutions such as the Red Sea Council, established in 2020 and the HoA Initiative (2019) share overlapping goals, notably "economic integration." However, the former is oriented toward geopolitical priorities,³⁰⁸ while the latter is development focused.³⁰⁹

With such regional initiatives, strong diplomatic frameworks were established. HoA projects have strengthened infrastructures and integration in the region³¹⁰ and the maritime programs led by the Red Sea council have improved regional cooperation on security.³¹¹

While both initiatives had partial successes so far and hold potential to reach their overall objectives, security threats, humanitarian, and development challenges remain consequential. There are, indeed, major gaps to fill and larger positive impacts to expect. There is a potential blending of priorities, but asymmetries in power and wealth risk undermining these aspirations. To address these issues, the private sector could be of

304. Seatrade Maritime, "DP World and Somaliland Open New Terminal at Berbera Port," [Seatrade-Maritime.com](https://www.seatrade-maritime.com), June 28, 2021,

305. Deutsche Welle, "At Port of Berbera, Dubai Invests in HoA Shipping," October 12, 2022.

306. Desiderio Consultants Ltd, "Ethiopia loses 19% stake in the port of Berbera", June 10, 2022.

307. Financial Times, May 29, 2024, Op. cit.

308. Saudi Press Agency. "Foreign Minister: The Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden Is a Joint Action System for Coordination and Cooperation." January 6, 2020.

309. HoA Initiative, "HoA Initiative. "Pillars of HoAI,"-

310. Vijay Pillai and Miguel de Corral, "Tackling Fragility and Promoting Integration in the HoA through Development Diplomacy," Brookings Institution, November 15, 2022.

311. International Maritime Organization, "Djibouti Code of Conduct," accessed October 11, 2025.

help, not only as an instrument of influence but as a mechanism for mutual economic resilience, a condition essential for long-term regional peace. In this framework it is useful to highlight Djibouti's strategic utilisation of its diplomatic and financial assets within this regional context, assessing its relationship with the UAE, Ethiopia and Saudi Arabia

Relations with the UAE, Djibouti's top Gulf trade partner³¹², became strained after Djibouti terminated DP World's port concession in 2018 due to concerns over sovereignty, and took over the Doraleh Container Terminal (DCT) over which the group had majority of effective control; the move led to legal disputes.³¹³ DP World is seeking around USD1 billion in compensation from the Djiboutian government, Port de Djibouti (PDSA) and its partner, China Merchants Port Holdings. And while some arbitration courts gave credit to DP World's claim, the London Court of International Arbitration (LCIA) recently ruled that the Port de Djibouti SA (PDSA) does not have to pay any damages to DP World and dropped the charges, saying that the termination of the contract was a government decision even if breaking the contract was deemed unlawful. The government of Djibouti maintains that the move was made in the country's national interest. For the Djiboutian government, the dispute can only be resolved through an agreement between DP World and the Republic of Djibouti that respects both national sovereignty and mutual interests.³¹⁴ The case highlights the ongoing tensions surrounding Gulf investments in the Horn.

Djibouti remains neutral in the Grand Renaissance Dam dispute due to its economic reliance on Ethiopia. Indeed, Djibouti's and Ethiopia's economies are deeply intertwined, with over 90 percent of Djibouti's imports coming from Ethiopia, including electricity and food.³¹⁵ Djibouti accommodates Ethiopia's demands for sea access for commercial purposes. Therefore, makes prompt, practical bilateral solutions propositions, such as the joint port management of Tadjourah Port³¹⁶, which offers a way for Djibouti to demonstrate its commitment to mutually beneficial cooperation while securing its position against competition from Somaliland and Puntland.³¹⁷ However, Djibouti rejects the establishment of an Ethiopian naval base on its shores.³¹⁸

The Saudi-Djibouti relationship balances development ambitions, security concerns, and diplomacy. The Kingdom, driven by its *Vision 2030* diversification agenda, is intensifying its investments in Djibouti and capitalising on its position as a gateway to the Red Sea.³¹⁹ The two countries have a solid partnership, formalised by a series of Memoranda of Understanding and strategic agreements, including a defence agreement.³²⁰ In 2024, Saudi Arabia secured a 92-year lease for a 120,000-square-meter logistics zone in Djibouti's free zone.³²¹ The Saudi Development Fund (SFD) has been active in Djibouti since 1982, financing infrastructure and social development projects;³²² and in 2024, SFD's financial commitment to Djibouti exceeded USD305 million.³²³

312. Volza, June 17, 2025, Op. cit.

313. Ziad Limam, "Doraleh-DP World: Djibouti Is Not Closing the Door on an Agreement," Next Is Africa, June 18, 2024.

314. African Law Business, "DP World Setback in Djibouti Port Saga," October 8, 2025.

315. Trading Economics, "Djibouti Imports from Ethiopia - 2025 Data."

316. France 24, "Djibouti Says Offering Port-Sharing Deal to Ethiopia," September 10, 2024.

317. Middle East Council on Global Affairs, "Ethiopia's Quest for a Seaport: A Threat to Regional Stability?" January 2024.

318. Affaritaliani. "Gibuti Respinge l'Etiopia: 'Non Siamo la Crimea del Corno d'Africa,'" September 12, 2024.

319. World Economic Forum, "How Africa and the Gulf Are Forging a New Partnership," April 16, 2024.

320. Arab News, "Saudi Arabia Strengthens Military Presence in Djibouti," February 18, 2024.

321. Arab News, "Africa and Gulf States to Boost Trade and Investment Ties," May 15, 2024.

322. Business Wire, "Saudi Fund for Development Inaugurated New Infrastructure Projects in Djibouti Worth USUSD137 Million," February 18, 2022.

323. Business Wire, 2022, Op. cit.

Security considerations are inseparable from these economic engagements. The Kingdom plans to establish a military base to solidify its presence in the regional geopolitical stage.³²⁴ While discussions have been going on for years, the plan has not materialised yet. Nonetheless, the two countries still reinforced their military cooperation; Djibouti reiterated its commitment to working alongside the Kingdom on the question of maritime security and counterterrorism in the Red Sea.³²⁵ Moreover, Saudi Arabia established the Islamic Military counter-terrorism coalition in 2015. The alliance comprises forty-three Arab and African states, including Djibouti.³²⁶ Moving forward, Saudi Arabia and Djibouti can strengthen their cooperation by setting up a joint task force under the existing joint committee³²⁷ between the two countries, to focus on trade and security while using regular dialogue and regional frameworks to navigate regional tensions and build solid and sustainable partnerships.

Despite opportunities for cooperation, significant risks and challenges persist. They include power asymmetries between wealthy Gulf states and often politically unstable Horn countries; Gulf rivalries that could reignite and destabilise Horn states; competing national agendas within the Horn, and the competing influence of external factors, such as UAE's DP World debacle in Djibouti and China stepping in to develop the Djibouti Multi-purposes Port. These unbalanced dynamics dictate trade and investment trends in ways that lean in favour of the Gulf monarchies. Additionally, the Horn states are dependent on external financing and have limited bargaining power over the terms of partnerships. Gulf rivalries could translate into competing infrastructure projects, for example, the parallel Emirati and Qatari³²⁸ port developments along the Somali coastline undermine regional integration. Furthermore, China, an extra-regional actor, brings investment funds while also introducing competing financing models and its strategic interests.³²⁹ These dynamics underscore the need for a new regional mechanism that can align development priorities with security concerns and national interests.

Outlook and Conclusion

The Red Sea's future depends on surpassing zero-sum competition and embracing a horizontal approach that integrates economic, security, and diplomatic considerations. From the Gulf perspective, the Red Sea is a vital corridor for oil exports, military logistics, and the projection of influence. From the Horn's perspective, particularly for Djibouti, Gulf engagement presents both opportunities and challenges.

The private sector can be a stabilising force within the regional security complex and should be recognised as a full-fledged regional actor. When empowered and consulted, it contributes to economic resilience and naturally mitigates conflict drivers such as unemployment and poverty. However, economic operators also face significant risks, including conflict spillovers, supply chain disruptions, maritime insecurity, and other investment deterrents.

324. CGTN Africa, "Saudi Arabia Is Latest Nation to Build Military Base in Djibouti", February 17, 2024.

325. Arab News, "Saudi Arabia Strengthens Military Presence in Djibouti", February 18, 2024.

326. Gulf Research Center, "Ports, Power, and Proxy Wars: GCC," Commentary & Analysis, June 10, 2025.

327. Saudi Press Agency, "Saudi-Djiboutian Joint Committee Convenes for Sixth Session in Riyadh", November 18, 2024.

328. CGTN Africa, "Somalia Inks USD200 Million Infrastructure Deal with Qatar", August 5, 2023,

329. Xiangming Chen, "China's Huge Geoeconomic Footprint in the HoA," [ThinkChina.sg](https://www.thinkchina.sg).

Therefore, a security-informed economic agenda is primordial, one that encourages private sector strategies that leverage the region's shared interests, as well as public-private partnerships aligned with regional peacebuilding roadmaps and priorities; such public-private partnerships, need to be well structured and built on fair agreements, shared responsibilities, and open stakeholder involvement. Indeed, with transparent monitoring and flexibility, these partnerships can deliver concrete benefits, balance interests, and keep economic projects adapted to the evolving realities in the region.

Economic integration, strengthened security, and diplomatic pragmatism are the foundations which should carry the future of the Red Sea. Gulf investors must adopt equitable partnership models, Horn states must strengthen bargaining power through regional institutions, and private sector actors must be seen as full political stakeholders. Only then can the Red Sea transition from an arena of rivalry into a platform for sustainable cooperation, leveraging opportunities.

Section 3

People



Employees of the International Organisation for Migration (IOM) assist Ethiopian migrants to board a ship repatriating them home via Djibouti, in Yemen's rebel-held Red Sea port of Hodeida on June 2, 2018. (Photo by ABDO HYDER / AFP)

Chapter 1

From Shared Histories to Shared Responsibility: Advancing a Rights-Based Cooperative Migration Framework in the Red Sea

By Leah Tesfamariam

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From Shared Histories to Shared Responsibility: Advancing a Rights-Based Cooperative Migration Framework in the Red Sea

Islam represents the most significant link between the two regions.³³⁰ Although the Middle East is regarded as the cradle of Islam, HoA is the site of pivotal moments in the history of Islam.³³¹ The first great *muezzin*, Seyyidna Bilal, was a Habashi—an inhabitant of present-day Ethiopia and Eritrea. Moreover, the first Muslims who fled prosecution in Mecca found refuge in the Christian Empire of Axum, also located in what is now Ethiopia and Eritrea.³³² Arabic constitutes another major connection. It is spoken on both shores, recognised as an official language in several HoA countries³³³ and has a strong influence on Swahili, the predominant language spoken across East Africa. In addition, tribal diaspora networks linking parts of the Middle East with HoA populations³³⁴ foster a sense of cultural proximity and shared identity across regions.

A negative dimension of this enduring multidirectional human mobility is the Red Sea Slave Trade,³³⁵ a broader commercial link that involved the enslavement of Africans and those of African descent in MECs. Engendering perceptions of dominance and social hierarchy between “Arabs” and “Africans”. Associations between blackness and slavery are still potent in shaping attitudes on both shores. This deep-seated prejudice has influenced contemporary labour migration and precluding a mutually beneficial relationship between natives and migrants otherwise united by common heritage.³³⁶

Against this backdrop, this chapter argues that while MECs and HoA³³⁷ share long-standing historical and cultural links, these relationships have been impeded by perceptions of Arab dominance, leading to asymmetrical power dynamics and discriminatory practices. In remedy, it advocates for a paradigm shift from a dynamic of dominance to true partnership founded on mutual respect and recognition of shared heritage. It suggests achieving this through a cooperative migration framework that fosters mutual respect, equality, and shared development goals that highlight shared culture and history. Emphasizing the need for concrete actions to institutionalise this shift and cultivate a more equitable and collaborative future. Contemporary diplomatic, economic and cultural relations between the two regions evoke long-standing historical linkages, forged by centuries of interaction, migration and exchange. Geographical proximity has long facilitated migrations and

330. Ibidem.

331. Jos Meester et al., 2018, Op. cit.

332. F. E. Peters, *Muhammad and the Origins of Islam*, SUNY Series in Near Eastern Studies (State University of New York Press, 1994).

333. Arabic is an official language in Djibouti, Eritrea, Somalia and Sudan.

334. Tribal diaspora populations such as Yemen with Somalia, Kuwait and Saudi Arabia with Sudan, and the Middle East with Eritrea reflect deep historical, cultural, and familial ties shaped by migration, trade, and shared religious traditions across the Red Sea.

335. Jonathan Miran, “Red Sea Slave Trade,” in *Oxford Research Encyclopedia of African History*, by Jonathan Miran (Oxford University Press, 2022).

336. Miguel MbiavangaAjú and Aleksi Ylönen, “The Middle East and Eastern Africa Intersected: Discussing Contemporary Connections,” *Cadernos de Estudos Africanos* 43 (2022): 13–39.

337. For the purposes of this chapter, Middle East Countries (MECs) refers to Yemen, Saudi Arabia, Kuwait, Oman, Qatar, and the United Arab Emirates (UAE). Arabian Peninsula is used interchangeably with MECs. HoA includes Ethiopia, Eritrea, Sudan, Somalia, Djibouti, and Kenya.

movements of populations, giving HoA its cultural hybrid character. Mutual penetration of cultural, economic and political influences engendered by enduring and profound interactions, inspired Ali Mazrui's conceptualization of "Afrabia", an integrated and overlapping region.³³⁸

Taking Stock of the Current Trends

Contemporary mobility between the regions is mixed, driven by voluntary and forced migration³³⁹ and largely irregular.³⁴⁰ Prospects of high-earning jobs and proximity are key pull factors for young Africans,³⁴¹ with routes through the Horn towards the Peninsula accounting for 90 percent of migration from East Africa.³⁴² About 750,000 Ethiopians live in Saudi Arabia.³⁴³ Of the 28.1 million migrants living in the Gulf in 2017, 12 percent were Africans. Migrants from the Horn form a large diaspora whose remittances represent a substantive part of external financial flows, while Gulf economies benefit from labour market contribution.³⁴⁴

Migration between the regions is largely irregular due to limited legal pathways.³⁴⁵ Of the 750,000 Ethiopians, 450,000 migrated through irregular means.³⁴⁶ Forced and irregular migration are driven by intersecting factors: poverty, unemployment, conflict, environmental degradation, and pursuit of better livelihoods.³⁴⁷ The Eastern corridor (through Yemen) accounts for 46 percent³⁴⁸ of all outward migration from the Horn.

Migration³⁴⁹ along this corridor dates back to historical trade routes.³⁵⁰ In 2019, about 11,500 people crossed monthly en route to Yemen, making it the busiest maritime route in the world.³⁵¹ In 2024, 446,000 movements were tracked.³⁵² Crossings are facilitated by smuggling networks and majority of the migrants intended to reach Saudi Arabia. Movements across the shores are bidirectional. Escalation of conflict in Yemen caused counter flows of migrants and refugees (Yemenis and those originally from HoA) to relocate to the Horn.³⁵³

338. Ali A. Mazrui, *The Africans: A Triple Heritage* (Boston: Little, Brown and Company, 1986).

339. Katrin Marchand, Julia Reinold, and Raphael Dias e Silva, "Study on Migration Routes in the East and HoA" (Maastricht Graduate School of Governance, 2018).

340. IOM, "Regional Migrant Response Plan (MRP) for the HoA to Yemen and Southern Africa," 2025-

341. Ibidem.

342. Wendy Williams, "African Migration Trends to Watch in 2025" (Africa Centre for Strategic Studies, February 23, 2025).

343. IOM, "Funding Needed to Assist Over 100,000 Ethiopian Migrants Returning from the Kingdom of Saudi Arabia," 2022.

344. Will Todman, "The Gulf Scramble for Africa: GCC States' Foreign Policy Laboratory," Centre for Strategic and International Studies, 2018.

345. Ibidem.

346. Ibidem.

347. Ibidem.

348. International Organization for Migration, ed., *A Region on the Move 2022: East and HoA* (International Organization for Migration, Regional Office for East and HoA, 2023).

349. The majority of those crossing are Ethiopian and Somali nationals and to a lesser extent, Eritreans, Djiboutians and Sudanese

350. Ibidem.

351. IOM, *Journey from Africa to Yemen Remains World's Busiest Maritime Migration Route*, February 14, 2020.

352. *Migration Along The Eastern Route*, no. 58 (IOM Regional Office for East, Horn and Southern Africa, 2025).

353. Research and Evidence Facility (REF), "EU Trust Fund for Africa (HoA Window) Research and Evidence Facility," July 2017, www.soas.ac.uk/hornresearch-ref.

Figure 8: Migration flows along the eastern route



Source: IOM 2023.

Migrants face hardships including starvation, dehydration and sleep deprivation throughout the perilous journey³⁵⁴ across harsh terrain.³⁵⁵ During sea crossings, migrants are forced to disembark far from shore or drown when boats capsize. In Yemen, they endure vulnerabilities including extreme physical violence, mental abuse, sexual assault, exhortation, kidnapping for ransom, detention by the authorities, trafficking and enslavement.³⁵⁶

Many migrants never complete the journey or may be forcibly returned, deported to another country, face detention under inhumane conditions or death. Aden became a detention hub for Ethiopian and Somali migrants. In May 2019, 5000 migrants had been detained.³⁵⁷ Those attempting to cross into Saudi Arabia face explosive attacks, close-range shootings, and inhumane detention conditions. In border zones like Monabbih and Al Thabbitt (Saudi-Yemen), African migrants face arbitrary detentions by Saudi and allied security forces.³⁵⁸

354. Ibidem.

355. Benedict Moran, "Crossroads Djibouti: The African Migrants Who Defy Yemen's War," The New Humanitarian, March 23, 2018.

356. Ibidem.

357. Danielle Botti and Melissa Phillips, "Record Numbers of Refugees and Migrants Arrive in Yemen amidst Intensifying and Complicated War," Mixed Migration Centre (blog), 19 August 2019.

358. Human Rights Watch, "Saudi Arabian Mass Killings of Ethiopian Migrants at the Yemen-Saudi Border," Report (New York: Human Rights Watch, 2023).

Regular migrants to GCC countries are not exempt from protection risks.³⁵⁹ For regular migrant workers, exploitation and abuse begins at departure and persists in employment, extending even to their attempts to return. Recruitment agencies often demand exorbitant fees and misrepresent job terms, wages, and conditions. Unregistered agencies, some linked to human smuggling and trafficking networks, use false promises to lure individuals into situations of forced labour, with little or no pay.³⁶⁰

Most African migrants are in domestic work and low-skilled, non-professional labour services such as cleaning, caregiving and construction.³⁶¹ Roles characterized by poor working conditions, limited legal protection and social invisibility, perpetuating long standing perception of Africans being primarily labourers and not equal participants in society. Relegation to the lowest tiers³⁶² reinforces historical perceptions of Arab superiority rooted in the history of slavery, thereby perpetuating discrimination and dehumanization.³⁶³

The Kafala system that binds migrant workers to employers continues to perpetrate and exacerbate slavery-like practices. The system reinforces restrictive migration governance by promoting short-term contracts that discourage long-term settlement, restrict family reunification, limited access to basic rights, and strict deportation measures.³⁶⁴ Between 2017 and 2022, Saudi authorities deported 519,000 Ethiopian migrants in coordinated mass return operations, targeting undocumented labourers.³⁶⁵ Pressure from rights activists, governments of labour-sending countries, academics, the UN and International Labour Organization (ILO) and Human Rights Watch has resulted in a piecemeal approach to reforms. Reforms included allowing change of employers without prior consent and introduction of minimum wage in Qatar and Saudi Arabia.³⁶⁶

Forced dependence on sponsors exposes workers from the Horn to vulnerabilities including non-payment, cut and/or denied wages. Migrants frequently face decent work challenges such as excessive workload and deprivation of rest. They are exposed to physical and sexual violence compounded by limited legal and procedural safeguards, in both origin and destination countries. Reports of severe rights abuse, including preventable death and persistent impunity continue to raise serious concerns among the African public.³⁶⁷

Competing Interests and Common Ground

Connections between the two regions, forged over centuries through trade, religious exchange and geographical proximity lay the foundation for convergences. Nonetheless, opportunities for deeper regional integration are countered by diverging strategic priorities and stark power asymmetries.

359. Ibidem.

360. Kennedy Atong, Emmanuel Mayah and Akhator Odigie, "Africa Labour Migration to the GCC States: The Case of Ghana, Kenya, Nigeria and Uganda," Report (Lomé: African Regional Organisation of the International Trade Union Confederation [ITUC-Africa], 2018)

361. Ibidem.

362. Requiring limited educational or formal training

363. Ibidem.

364. S. V. Aarthi and Mrutujanaya Sahu, "Migration Policy in the Gulf Cooperation Council (GCC) States: A Critical Analysis," Contemporary Review of the Middle East 8, no. 4 (2021): 410–34.

365. IOM, "Return of Ethiopian Migrants from the Kingdom of Saudi Arabia," Annual Overview (IOM Regional Office for the East and HoA, 2022).

366. Ibidem.

367. Ibidem.

Migration has been an arena of confrontation in MECs-HoA relations. The two regions perceive migration differently depending on their social, economic and political priorities. For the Horn, it is a strategy of economic sustainability. Remittances form a critical source of development financing, while diaspora communities contribute to sustainable livelihood and long-term economic resilience.³⁶⁸ Total estimated remittances flow from Saudi Arabia to Ethiopia is USD 3-3.5 billion accounting for 7.4 percent of GDP.³⁶⁹ However, migrants from the Horn are subjected to exploitative labour conditions.³⁷⁰ African migrant workers, majority of whom have migrated under irregular channels and vulnerable conditions, encounter rampant abuse, trafficking and mass deportations (without due process), raising serious humanitarian concerns and triggered diplomatic tensions. Practices that curtail fundamental rights enshrined in the ILO conventions, the International Covenant on Civil and Political Right ICCPR, and International Covenant on Economic, Social and Cultural Right ICESCR. Thus, Horn states have blamed their counterparts for poor labour regulations encouraging systemic and gross violations of fundamental rights of their citizens. Conversely, the Gulf has accused the Horn for inadequately responding to soaring illegal migration. Periodic crackdowns and mass expulsions of migrant workers have caused diplomatic strains.³⁷¹ Countries from the Horn such as Kenya and Ethiopia, have responded with labour migration bans.³⁷²

Gulf States largely view African migration through the lens of economic utility and border management, prioritizing regulation of labour flows for political and social stability safeguards.³⁷³ In most GCC countries, non-nationals outnumber nationals, with foreign workers constituting over 70 percent of the total workforce in countries like the UAE, Qatar, and Kuwait.³⁷⁴ The youth bulge across Gulf States has intensified pressure on labour markets, triggering nationalization policies such as Saudization, Emiratization, and Omanisation aimed at reducing reliance on expatriate labour and addressing youth unemployment.³⁷⁵ Migrants are viewed as temporary labour intended to fill low-skilled or less attractive jobs. Migration governance is therefore designed to preserve national identity, manage demographic imbalances and limit perceived social disruption rather than human rights protection and long-term integration. Resultantly, policies are often characterized by narrow legal pathways, limited legal protections and high rates of deportation for irregular migrants, particularly for the Horn.³⁷⁶

368. Laura Hammond, "Obligated to Give: Remittances and the Maintenance of Transnational Networks Between Somalis at Home and Abroad," *Bildhaan: An International Journal of Somali Studies*, no. 10 (2010): 125–51.

369. Leon Isaacs, "Scaling Up Formal Remittances To Ethiopia" (Regional Office for the EEA, the EU and NATO International Organization for Migration, Brussels, Belgium, August 2017).

370. Ibidem.

371. Rashid Abdi, "A Dangerous Gulf in the Horn: How the Inter-Arab Crisis is Fuelling Regional Tensions," International Crisis Group, 2017.

372. Ibidem.

373. Martin Ruhs, *The Price of Rights: Regulating International Labour Migration* (Princeton University Press, 2013).

374. GLMM, "Graph GCC: Percentage of Nationals and Non-Nationals by Country (Mid-2022)" (Gulf Labour Markets, Migration, and Population (GLMM), 2025).

375. Steffen Hertog, "Arab Gulf States: An Assessment of Nationalisation Policies," European University Institute and Gulf Research Center., no. RP No. 1 (2014).

376. Helene Thiollet, "Migration as Diplomacy: Labour Migrants, Refugees, and Arab Regional Politics in the Oil-Rich Countries," *International Labour and Working-Class History* 79, no. 1 (2011): 103–21.

Migration can transform to a sphere of structured cooperation through the adoption of a rights-based, development-oriented approach to labour-mobility. If effectively administered, migration has the potential to foster people-to-people ties, regional integration and shared prosperity. Migration offers economic opportunities for both the Horn and Gulf states. The Gulf's dependence on low-wage African labour creates a mutual economic interdependence and potential for coordinated labour agreements, skills transfer, and remittances-led development. Converging interests exist in formalizing labour agreements, countering trafficking networks, and improving migrant welfare. Existing bilateral agreements, such as Ethiopia with Saudi Arabia, the UAE, and Jordan, and ongoing negotiations with Kuwait, Bahrain, and Oman³⁷⁷ highlight the potential for a broader Red Sea migration cooperation forum, a multilateral platform that brings together labour-sending and receiving states to harmonize standards, uphold rights, and facilitate safe and orderly mobility.

Reflections and Outlook

Historical continuities and geographical proximity may enhance MECs and HoA relations, but conscious steps are needed to pursue new forms of solidarity and recalibrate the relationship. Both sides must invest in institutionalised mechanisms for dialogue and cooperation to sustain momentum and operationalise shared ambitions.

This chapter finds evidence of growing convergence in the relationship between MECs and the HoA, marked by cooperative migration governance. This can only succeed if grounded in principles of equality, transparency, and progressive shared responsibility, forming, as this chapter argues, a vital interregional model of solidarity.

Shifting social and economic landscape in GCC have driven wide-ranging structural changes aimed at economic diversification, job creation, and modernization,³⁷⁸ exemplified by Saudi Arabia's, Vision 2030. As GCC states are no longer able to rely solely on hydrocarbons to maintain global relevance, Member States are actively working to rebrand themselves, pivoting towards more socially open, reform-oriented, and investment-friendly societies.³⁷⁹

For their part, in this evolving regional landscape, Gulf states must move beyond historical and cultural hierarchies toward relationships rooted in mutual respect and recognition of agency.³⁸⁰ To remain relevant, the peninsula must go beyond historical and cultural dominance towards a more balanced, mutually respectful partnership that recognizes the agency of HoA countries. Attitudes rooted in an Arab-centric superiority must give way to equality, mutual understanding, and respect.

Conversely, countries from the Horn need to strengthen their regional coordination through the African Union (AU) or relevant Regional Economic Communities (RECs) to manage engagement with MECs. Such coordination would help ensure that external partnerships advance Africa's long-term development goals rather than undermining its strategic autonomy.

377. "Ethiopia Established Legal Employment Agreements with Various Countries," Fana Media Corporation (FMC) (Addis Ababa), April 4, 2024.

378. International Monetary Fund, Gulf Cooperation Council: Economic Prospects and Policy Challenges for the GCC Countries, IMF Staff Country Reports (Washington, D.C: International Monetary Fund, 2023).

379. Jane Kinninmont, "Vision 2030 and Saudi Arabia's Social Contract Austerity and Transformation" (Chatham House, July 2017).

380. Ibidem.

In this context, adopting a more humane and rights-based joint migration partnership could be pivotal in reinforcing this transformation, enhancing international credibility while addressing longstanding labour rights concerns and human dignity. Beyond improving the treatment of migrant workers, it would signal a genuine commitment to equitable partnership and respect for sovereignty, dignity, and agency of their HoA counterparts. Countries of origin in the HoA must assert themselves to ensure their citizens' rights,³⁸¹ and, as such, advancing the Red Sea into a space for collaborative regional development.

381. Ibidem.

Chapter 2

Bodies Between Waves and Rifles: The Militarization of Migration in the Red Sea

By *Faozi Al-Goidi*

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Bodies Between Waves and Rifles: The Militarization of Migration in the Red Sea

In recent years, the Red Sea has transformed from a mere migrant corridor to the Gulf into a complex arena for the recruitment and exploitation of African migrants in armed conflicts. Indeed, despite the conflict in Yemen, migrants from the HoA have continued to cross the Red Sea to Yemen with the aim of reaching the Gulf states, but border restrictions imposed during the conflict have often left them stranded there, trapped in the war and at the mercy of armed groups that exploit them as fighters. To analyse this phenomenon, this chapter adopts the term “militarization of migration”—a phrase that may sound paradoxical, as migration implies the search for life, while militarization is an approach to death. By this, the contribution refers to the systematic process by which migrants are transformed from civilians seeking safety or opportunity into participants in armed conflict, operating across three intertwined dimensions: humanitarian, through the exploitation of migrant vulnerability; security, through their use as manpower in combat; and strategic, through their deployment as tools in regional warfare. The militarization of African migrants between Yemen and the Horn presents a multidimensional security challenge—one that transcends conventional understandings of irregular migration, generating new conflict dynamics that threaten regional stability.

In particular, this chapter focuses on the recruitment of African migrants—especially from Ethiopia and Somalia—into Yemen’s armed conflicts between 2015 and 2025, examining key actors, such as the Houthis, Al-Qaeda, the internationally recognized Yemeni government, and affiliated militias. It explores how these migrants are drawn into conflict, the motivations driving armed groups to enlist them, the humanitarian and security consequences of this practice, and the possibilities for transforming the Red Sea from a theatre of conflict into a space for regional cooperation.

The Sea That Divides and Connects

Despite the war in Yemen since 2015, migrants from the HoA have continued to cross the Red Sea to Yemen. Arrivals peaked in 2018 with around 160,000,³⁸² dropped sharply during the COVID-19 pandemic to about 28,000 in 2020–2021,³⁸³ and rebounded to nearly 97,000 in 2023 before slightly declining in 2024.³⁸⁴ According to the International Organization for Migration (IOM), approximately 446,000 movements were recorded along the Eastern Route in 2024, with 10 percent being children. Between January and June 2025³⁸⁵ alone, around 115,000 movements were registered,³⁸⁶ marking a significant increase compared to the same period in 2024. If this trend continues, the total could exceed 230,000 by the end of 2025.³⁸⁷

382. Danielle Botti and Melissa Phillips, “Record Numbers of Refugees and Migrants Arrive in Yemen Amidst Intensifying and Complicated War,” Mixed Migration Centre, August 19, 2019.

383. International Organization for Migration (IOM), *Global Activity Report 2022 – Operations and Emergencies* (Geneva: IOM, 2023).

384. Reuters, “At Least 49 Migrants Dead, 140 Missing off Yemen Coast, IOM Says,” June 11, 2024.

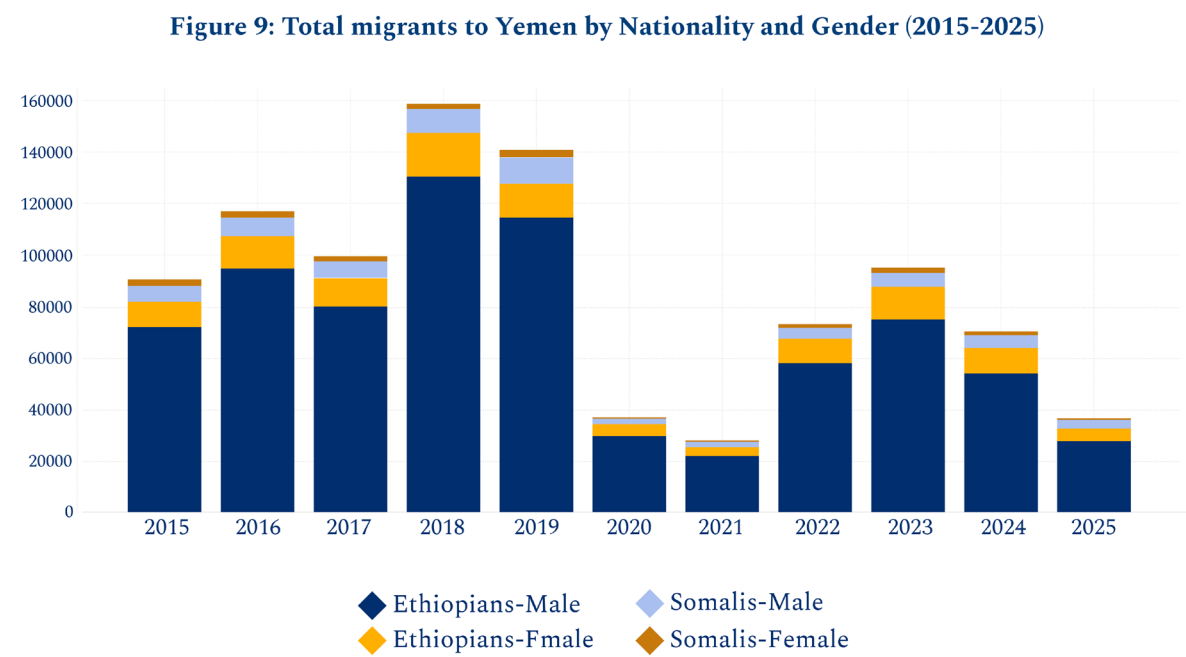
385. IOM Yemen (@IOM_Yemen). “In 2024, nearly 70K migrants arrived in Yemen, hoping for safety and opportunity. However, they are trapped in dire conditions.” X (formerly Twitter), April 19, 2025.

386. International Organization for Migration (IOM), “IOM Delivers Lifesaving Medical Supplies to Strengthen Yemen’s National Health System,” IOM Yemen, May 5, 2025.

387. International Organization for Migration (IOM), *Regional Migrant Response Plan for the HoA and Yemen 2025*.

Ethiopians have consistently made up the vast majority of migrants arriving in Yemen, followed by Somalis. Other nationalities—such as Eritreans or migrants from various African countries—constitute a very small fraction, often less than 1 percent annually.³⁸⁸ These flows represent mixed migration³⁸⁹, including both refugees and economic migrants.

Figure 9: Total migrants to Yemen by nationality and Gender (2015-2025)³⁹⁰



Most migrants arriving in Yemen by sea are young males, with smaller proportions of women and children.³⁹¹ According to IOM, men constitute around 68–70 percent of migrants along the Eastern Route, women account for 20–22 percent, and children represent about 10 percent, most of them boys. These proportions reflect a consistent trend in recent years³⁹²: The vast majority of migrants along the Yemeni route are young men traveling alone in search of work in the Gulf—typically using Yemen as a transit point to Saudi Arabia—with fewer women and children accompanying them.³⁹³

Despite Yemen’s dire economic, political, and environmental conditions, it remains a destination for those seeking a better life—or passage to the wealthier Gulf states.³⁹⁴ This paradox—continued migrant inflows into a country ravaged by war—can be partly explained by the weakness of state authority and the absence of effective border control,

388. International Organization for Migration (IOM), IOM’s DTM Yemen: Flow Monitoring – Annual Report 2024 (Geneva: IOM, February 12, 2025).

389. UNHCR, “UNHCR Warns Against Perilous HoA Sea Crossings as 92,000 Reach Yemen in 2015, 36 Already Drowned This Year,” UNHCR Africa, January 19, 2016.

390. These statistics were compiled by the author from various reports and have been documented in the previous footnotes.

391. International Organization for Migration (IOM), Mixed Migration in the HoA and in the Arab Peninsula, report, IOM Regional Office for the East and HoA (Nairobi, Kenya), June–December 2017.

392. IOM Regional Data Hub, Quarterly Migration Overview 2025,

393. Botti and Phillips, “Record Numbers of Refugees and Migrants”, Op. cit.

394. Muneer Bin Wabar, “Migration from the HoA to Yemen: Not Just a Passing Phenomenon,” Fikra Forum, The Washington Institute for Near East Policy, May 12, 2023,

which facilitates human smuggling networks. But it also reflects the desperation of these migrants and their lack of viable alternatives in both their home countries and potential destinations. This pattern is reinforced by geographic proximity and the relatively low cost of the journey from the HoA to Yemen (about USD 170–200) which makes accessible to a wide range of would-be migrants. Nevertheless, while Yemen has been usually intended as a transit point to Gulf states, the deepening Yemen’s humanitarian crisis has prompted Gulf countries to tighten border restrictions, making Yemen a de facto destination for many migrants. As a result, migrants find themselves trapped in a war-torn land, vulnerable to poverty, discrimination, and violence. In this environment, they become easy prey for armed groups offering “jobs” in their ranks—either by choice or coercion.³⁹⁵ The trend is exacerbated by the demographic profile of the migrants, the majority of whom are adult males—a demographic more readily mobilized and militarized for combat.

From Migrant to Fighter

Most migrants begin their journey in Ethiopia, converging near the Djibouti–Somalia border. From there, they follow one of two routes: a less common one via Bosaso, Somalia, and a main route from Djibouti to Ras Al-Arah near Aden, using overcrowded fishing boats³⁹⁶.

Though Yemen is generally seen as a stopover on the way to Saudi Arabia, the reality reveals a complex system of detention, extortion, and recruitment. In many cases, migrants are held in clandestine camps, where their families are extorted for ransoms ranging from USD 350 to USD 1,000. Those who cannot pay are either sold into forced labour or recruited by armed groups such as the Houthis or Al-Qaeda.³⁹⁷ Those who escape this fate begin a far more treacherous land journey—starting in Aden, passing through Dhamar, Sana’a, and Marib, and ending in Saada—in a perilous attempt to infiltrate Saudi territory.³⁹⁸

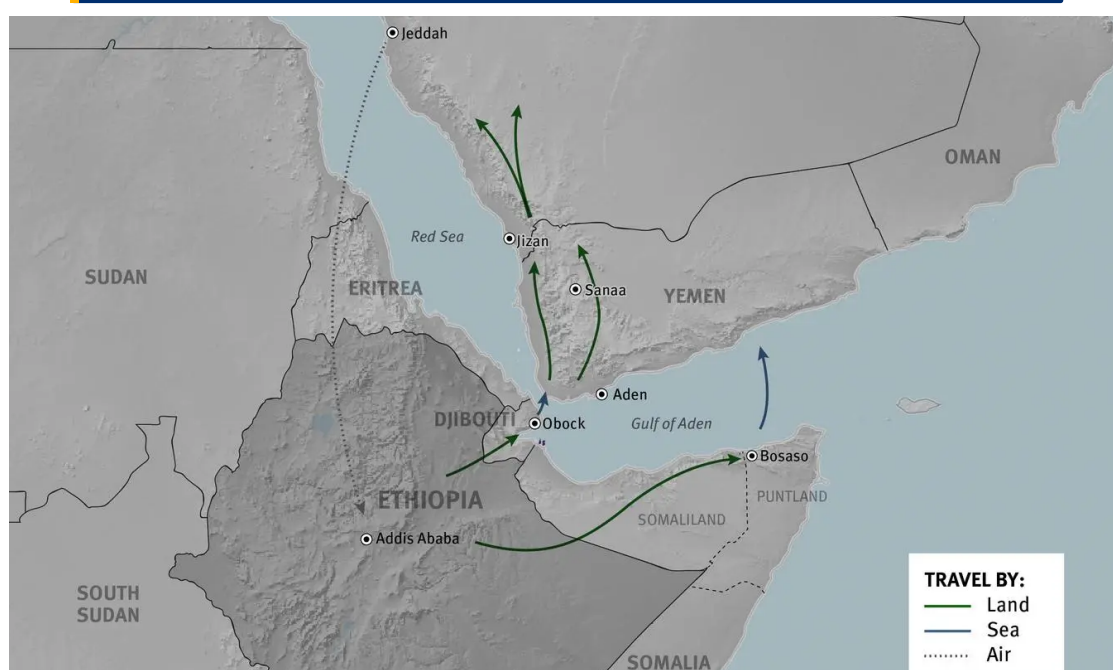
395. Ṭariq al-Mawt: Ithiyūbiyā [The Road of Death: Ethiopia], documentary film, Al Jazeera 360, accessed August 3, 2025.

396. Interview with a journalist who met with the smugglers via Zoom, May 14, 2025.

397. Interview via WhatsApp with Colonel Yahya al-Hatami, Head of the Military Media Sector in the Yemeni National Army, conducted by the author, May 21, 2025. Interview with a journalist who met with the smugglers via Zoom, May 21, 2025

398. Ibidem.

Figure 10: Map of migration routes from the HoA to Yemen



Source: Human Rights Watch, “Ethiopians Abused on Gulf Migration Route,” Human Rights Watch, August 15, 2019.

Smuggling and human trafficking networks play a central role in transforming migrants into fighters. These networks do more than ferry migrants across the sea for hefty sums—they sometimes hand them directly over to armed groups. According to anti-Houthi Yemeni sources, one smuggler, an Eritrean national, was arrested after working for two years with the Houthis, recruiting African migrants for USD100 per head.³⁹⁹ Recruitment is only part of the story. Field reports indicate that migrants are exploited in a range of criminal activities: from drug possession and trafficking to sex work,⁴⁰⁰ and even torture of political prisoners.⁴⁰¹

As the migrant is drained along the way, the machinery of militarized migration begins to operate. According to intelligence reports, hundreds of Ethiopian migrants, particularly from the Oromo ethnic group, were recruited by the Houthis during battles in Shabwa, Marib, and Saada in 2023⁴⁰². These fighters were used as human shields, weapons couriers, trench diggers, reconnaissance agents, and even as sleeper cells tasked with planting IEDs targeting the internationally recognized Yemeni army.⁴⁰³ Recruitment has not been limited to men; migrant women have also been conscripted.

Recruitment patterns display notable variation, yet the underlying objective remains constant: the instrumentalization of the migrant for military purposes. The first pattern is direct coercion, whereby migrants are detained and compelled to fight under the threat of torture or death. The second is material inducement, involving promises of employment,

399. Interview with Colonel Yahya al-Hatami, May 14, 2025.

400. See: Mwatana for Human Rights, *Transit in Hell: The Horrific Violations Targeting African Migrants During Their Journey Across Yemeni Territory*, December 18, 2023.

401. Interview with a journalist who met with the smugglers via Zoom, May 14, 2025.

402. Leaked intelligence report from the Intelligence and Reconnaissance Authority, Ministry of Defense, Republic of Yemen, dated April 2023. Copy on file with the author.

403. Interview with Colonel Yahya al-Hatami via Zoom, May 14, 2025.

financial reward, or shelter in exchange for participation in combat. The third is economic exploitation, in which migrants are detained and their families extorted; failure to meet ransom demands often results in recruitment being presented as a means of “repaying” the debt. The fourth is deception, where migrants are misled into believing they will be employed in sectors such as construction or agriculture, only to find themselves deployed in frontline tasks such as digging trenches in active combat zones.

In practice, these patterns are not mutually exclusive and frequently intersect. Migrants may initially consent to work under false pretences but subsequently face direct coercion. Moreover, in contexts characterized by acute vulnerability, state fragility, and states of exception, the very notion of “consent” becomes highly problematic, shaped by varying degrees of misinformation, indirect coercion, and severely diminished agency.

In areas controlled by Ansar Allah (the Houthis), African migrants have faced systematic exploitation and repression under various pretexts. In early 2020, amid the spread of COVID-19, the Houthis used the pandemic as a justification to forcibly expel migrants from their territories. In April that year, their forces launched a violent campaign that pushed thousands of Ethiopians toward the Saudi border amid heavy gunfire, killing and injuring dozens—by both Houthi and Saudi border forces. Nearly 20,000 migrants were left stranded in what became known as the “valleys of death,” with no food or water.⁴⁰⁴ The Houthi response went beyond mass expulsions: many migrants were detained in overcrowded, substandard facilities. Witnesses reported that large numbers were held in locked centers lacking basic humanitarian conditions. One such detention site was struck in a US airstrike in March 2025, killing dozens of African detainees.⁴⁰⁵

For the Houthis, the recruitment of African migrants offers a low-cost strategy to offset manpower shortages. Unlike forced conscription of Yemenis—which might provoke local backlash—migrants have no voice and no protection. Placing them on frontlines spares Yemeni fighters’ lives and allows the group to frame them in propaganda as righteous martyrs.

But the Houthis are not alone in this exploitation. Al-Qaeda in the Arabian Peninsula (AQAP), active in Shabwa, Abyan, and Al-Bayda, has long been involved in human and arms trafficking. Reports have documented longstanding cooperation between AQAP and Somalia’s Al-Shabaab, including fighter exchanges and smuggling expertise across the Red Sea. In some cases, migrants were recruited by Al-Qaeda and later handed over to the Houthis⁴⁰⁶—a paradox that highlights the blurred lines between supposed rivals.

In an even more complex picture, intelligence suggests growing cooperation between the Houthis and Al-Shabaab. Reports reveal joint smuggling operations, technology exchanges, and armed military training between Yemen and Somalia.⁴⁰⁷ The Red Sea is no longer just a maritime corridor—it has become a strategic conduit for weapons, fighters, recruitment networks, and transnational militia agendas. While the Red Sea has historically served as a conduit for weapons and fighters since the 1970s and 1980s, contemporary intelligence

404. Global Detention Project, “Yemen: Detention Profile,” Global Detention Project, accessed May 20, 2025.

405. Reuters, “Suspected US Airstrike Hits Yemen Migrant Centre Killing 68,” video report, April 28, 2025–

406. Interview with a journalist who met with the smugglers via Zoom, May 14, 2025

407. Geeska Afrika, “Are the Houthis Really Working with al-Shabaab?” Geeska Afrika, accessed May 20, 2025.

indicates an intensification and systematization of these networks, now encompassing sophisticated recruitment operations and coordinated transnational militia agendas that extend beyond traditional arms smuggling.

A Negative Convergence:

The militarization of Migrants at the Nexus of Red Sea Conflicts

The militarization of migration in Yemen cannot be separated from the broader dynamics of the Red Sea. The structural link between political fragility in the HoA and the protracted armed conflicts in Yemen has rendered migrants an invisible bridge between two unstable shores. This connection operates through overlapping crises: weak governance, chronic economic deprivation, and recurrent environmental shocks in the Horn push populations toward Yemen, while Yemen's conflict actors exploit these flows for recruitment and logistical support.

Geopolitical shifts—such as the deepening involvement of Gulf states and external powers in the Red Sea security architecture, the realignment of alliances between regional actors, and the emergence of new maritime security initiatives—have, paradoxically, reinforced rather than dismantled this pattern. Arms deals, covert logistical arrangements, and tacit regional complicity have enabled both the means and the incentives for armed groups to instrumentalize migrants.

Under such conditions, the nameless migrant becomes a mere entry in the war logbook—a body transferred from a boat of survival to a frontline trench, from a map in search of refuge to a target list. This grim reality reflects a total collapse of humanitarian values, national sovereignty, and international justice in a region where geopolitical contests overshadow the most basic human considerations.

Ultimately, conflicting regional and international interests have turned African migrants into instruments of a strategic struggle far beyond their will or capacity. What began as a flight from drought, deprivation, and political instability has, through the region's complex dynamics, evolved into a transnational system that produces both fighters and victims. Today, we are witnessing the emergence of a new cross-Red Sea axis linking armed groups in Yemen—such as the Houthis and Al-Qaeda in the Arabian Peninsula—with their counterparts in the HoA, notably Al-Shabaab in Somalia and various clan-based militias. This linkage operates through shared smuggling routes, arms transfers, facilitation networks, and, increasingly, the exchange of tactical expertise and manpower, creating unprecedented channels of operational cooperation.

This emerging alliance represents what could be termed a “negative convergence” of violent non-state actors, where groups with differing ideological agendas nonetheless find common cause in exploiting the vulnerabilities of migrants for military and financial gain. Such convergence has the potential to reshape regional power alignments by embedding armed groups more deeply within cross-border logistical and recruitment networks, thereby complicating counterterrorism and maritime security efforts. For migrants, the implications are catastrophic: trapped between the hammer of humanitarian crises and the anvil of exploitation in conflict zones, they are transformed into both a resource for, and a casualty of, a conflict system that transcends national borders.

Outlook and Conclusions

Ending the militarization of migrants in Yemen is not merely a human rights demand, but also a regional security imperative. If current dynamics persist, three troubling developments are likely to unfold: first, the further sophistication of recruitment networks as armed groups learn from each other's tactics across the Red Sea; second, the expansion of this militarization model to other conflict zones where migration and warfare intersect; and third, the entrenchment of a generation of fighters whose only identity is forged through violence, creating long-term regional instability that will outlast any ceasefire agreement.

The solution requires addressing root causes rather than symptoms. Establish the Red Sea Migration Compact, a trilateral framework coordinated by Ethiopia's Ministry of Labor and Social Affairs, the UAE's Ministry of Human Resources and Emiratisation, and Saudi Arabia's Ministry of Human Resources and Social Development, with technical support from IGAD's Labor and Social Affairs Division. This compact would create 30,000 annual legal work permits for Ethiopian and Somali nationals to Gulf states, bypassing the Yemen route entirely. Implementation would occur through quarterly ministerial meetings, standardized skills assessments conducted by Gulf technical institutes, and bilateral labour agreements that include protection mechanisms. Funding would come from redirecting existing Gulf development aid to Ethiopia and Somalia into job creation programs that target migration-prone regions.

However, the prerequisite for this compact is a political convergence among the three countries. They must agree that the cost of inaction—in terms of security risks, regional instability, and the human toll on migrants—is higher than the political cost of changing course and revising current restrictive policies. This approach transforms the fundamental equation: instead of dangerous journeys to exploitation, it creates legal pathways to opportunity. By removing the incentive for Yemen transit, it eliminates migrants' vulnerability to militarization while addressing Gulf states' documented labour shortages.

These migrants, sailing in search of new horizons, must not be turned into instruments of death in a war that is not theirs. The choice before the region is stark: establish legal migration pathways or risk allowing desperation to continue feeding the war machinery that exploit human suffering for strategic gain. Transforming the Red Sea from a graveyard into a corridor of hope requires recognizing that regional security ultimately depends on human dignity and economic opportunity.

Chapter 3

Currents of Influence: Cultural Soft Power Across the Red Sea

By Rossella Marangio

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Currents of Influence: Cultural Soft Power Across the Red Sea⁴⁰⁸

Does the Red Sea connect or divide the countries along its shores? Looking at the exchanges between the African continent and the Middle East, it clearly connects them. These interactions date back to ancient times and are often intertwined with mythologies of shared ancestry—such as the Arab lineage of some Somali clans or the Ethiopian Solomonic dynasty's purported ties to the kingdoms of Israel and Judah. These deeply rooted linkages are evidenced historically: early Muslims sought refuge from persecution in the Axumite Kingdom of Ethiopia; the Ottomans maintained control over Massawa (in present-day Eritrea) and Suakin (Sudan); and spiritual and commercial relations thrived with centres like the Sultanate of Harar.

Such connections have not faded over time but have evolved. Today, they are regaining momentum as political, economic, and security interests around the Red Sea intensify. The Kingdom of Saudi Arabia (KSA), Türkiye, the UAE and Qatar have emerged as particularly invested in deepening ties with the HoA and Egypt. Drawing on geographic proximity and historical ties, these states are increasingly integrating cultural instruments—education, religion, and creative industries—into broader strategies of influence.

While significant attention has been paid to the economic and military dimensions of these engagements, the cultural strand —often less visible yet equally consequential—is equally essential to unpack the nature of relations between the two shores. This chapter explores this dimension, examining cultural soft power initiatives across the Red Sea, how they shape bilateral and regional relationships, and why they deserve greater analytical weight. In a region where competition and cooperation intertwine, soft power often offers an additional channel for influence, mirrors existing patterns: preferences for bilateral ties, asymmetries in power across the two shores, and the regional and domestic cleavages that underpin broader geopolitical dynamics. Yet, with their potential to develop people-to-people relations, these cultural initiatives could also open pathways toward greater mutual understanding.

Cultural Tides Across the Red Sea

Over the past decade, Gulf countries and Türkiye have significantly expanded their relations with the HoA. High-level diplomatic visits and forums such as the Saudi Arabia–Africa Summit held in 2023 have amplified political visibility. Institutional dialogues and cooperative frameworks further reinforce the ties. At the same time, cross-regional interaction is facilitated by higher mobility of people that builds on expanding airline networks and some visa facilitation that, however, results asymmetrical (Table 4). Countries such as Egypt, KSA, the UAE, Djibouti, Ethiopia, Eritrea, Somalia, Türkiye, and Sudan (currently mostly Port Sudan) are linked through frequent air traffic operated by carriers including Turkish Airlines, Emirates, Qatar Airways, Ethiopian Airlines, and budget airlines like Flynas, Flydubai, and Air Arabia.

408. The views expressed in this article are those of the author and do not necessarily reflect the views of the EUISS or the European Union.

In tandem with economic and political cooperation, this infrastructure of mobility supports initiatives in the fields of education, humanitarian aid, and cultural exchange. Gulf states and Türkiye increasingly offer educational opportunities for African students, reflecting a strategic blend of capacity-building and influence projection. For example, Saudi Arabia operates a school in Djibouti serving both Saudi citizens abroad and local Arab and Islamic communities.⁴⁰⁹ The UAE developed a digital school that currently operates in Egypt (and Mauritania) and it is developing further agreements with other African countries like Tanzania.⁴¹⁰ It also launched the UAE–Africa Gateway to promote investment and development, including in education and tourism.⁴¹¹ The Africa Institute in Sharjah (UAE), founded in 1976, offers MA and PhD programmes focused on African studies, with fellowships for African and diaspora students.⁴¹² Türkiye’s Yunus Emre Institute fosters Turkish language and culture across the region, with centres in Oman, Kuwait, Qatar, Egypt, Sudan, and Somalia.⁴¹³ The Qatar Fund for Development and Qatar Charity also provide educational assistance, particularly in Somalia and Sudan, where efforts also include mosque construction⁴¹⁴.

Table 4: Current visa policies across the Red Sea

To From	KSA	UAE	Qatar	Türkiye	Ethiopia	Eritrea	Somalia	Djibouti	Sudan	Egypt
Ethiopia	visa	e-visa	e-visa	e-visa		VOA	VOA	VOA	visa	visa
Eritrea	visa	e-visa	e-visa	e-visa	e-visa		VOA	VOA	visa	visa
Somalia	visa	e-visa	e-visa	e-visa	VOA	visa		VOA	visa	visa
Djibouti	visa	e-visa	e-visa	e-visa	visa free	visa	VOA		visa	visa
Sudan	visa	e-visa	e-visa	e-visa	e-visa	VOA	VOA	VOA		visa
Egypt	visa	e-visa	e-visa	e-visa	e-visa	visa	VOA	VOA	visa	

409. Saudi Arabia, Ministry of Education, Saudi schools abroad, <https://moe.gov.sa/en/education/ResidentsAndvisitors/pages/schoolsabroad.aspx>.

410. The Digital school, UAE’s digital education initiatives in Africa contribute to youth development, 13 February 2025, <https://thedigitalschool.org/press-release/uaes-digital-education-initiatives-in-africa-contribute-to-youth-development/UAE>.

411. UAE, Ministry of economy, <https://uaeafriagateway.ae/>.

412. The Africa Institute, <https://www.theafricainstitute.org/institute-program/global-africa-translation-fellowship/>.

413. Yunus Emre Institute, <https://www.yee.org.tr/en/corporate/yunus-emre-institute>.

414. Qatar charity, projects, <https://www.qcharity.org/en/qa/campaign?campaignId=154>.

To From	Ethiopia	Eritrea	Somalia	Djibouti	Sudan	Egypt	KSA	UAE	Türkiye
KSA	VOA	visa	VOA	VOA	visa	visa free		visa free	visa free
UAE	VOA	visa	VOA	VOA	visa free	Visa free	visa free		visa free
Qatar	VOA	visa	VOA	VOA	visa free	visa	visa free	visa free	visa free
Türkiye	VOA	visa	VOA	VOA	VOA	VOA	VOA	e-visa	
Israel	VOA	visa	VOA	VOA	visa	visa	visa	visa free	visa free
Egypt	e-visa	visa	VOA	VOA	visa		visa	e-visa	e-visa

Source: Author's elaboration based on data from Henley Global, Passport index, <https://www.henleyglobal.com/passport-index>.

The number of students from the Horn countries to the Gulf and Türkiye grew significantly. Between 2012 and 2022, students from Djibouti, Eritrea, Ethiopia and Somalia to Saudi Arabia and the UAE increased exponentially from a few dozens to hundreds. Between 2014 and 2024, Türkiye registered the biggest increase in students from the same countries in line with Turkish renewed outreach to the region (Table 2).

Table 5: Students by countries of origin and destination

Origin Country	Destination Country	2012	2014	2022	2023	2024	% increase 2012-2022	% increase 2014-2024
Djibouti	Saudi Arabia	65	131	292			349%	
Eritrea	Saudi Arabia	96	793	411			328%	
Ethiopia	Saudi Arabia	165	331	476			188%	
Egypt	Saudi Arabia	2403	4824	3369			40%	
Somalia	Saudi Arabia	349	700	664			90%	
Djibouti	UAE	27		86	52		219%	
Eritrea	UAE	28		365	123		1204%	
Ethiopia	UAE	36		1414	720		3828%	
Egypt	UAE	2948						
Somalia	UAE	538		2446	1980		355%	
Djibouti	Qatar	7	16	8	4		14%	
Eritrea	Qatar	13	14	22	24		69%	
Ethiopia	Qatar	7	15	33	35		371%	
Egypt	Qatar	836	1447	1698	1834		103%	
Somalia	Qatar	135	183	290	297		115%	
Djibouti	Türkiye	33	60	1420			4203%	
Eritrea	Türkiye	0	5	170				
Ethiopia	Türkiye	71	184	951			1239%	
Somalia	Türkiye	252	638	10894			4223%	
Djibouti	Egypt		57			344		504%
Eritrea	Egypt		42			95		126%
Ethiopia	Egypt		20			18		-10%
Somalia	Egypt		372			606		63%

Source: Author's elaboration based on data from UNESCO, <https://databrowser.uis.unesco.org/>, and UAE Ministry of Education (2017-2023 UAE Data), <https://www.moe.gov.ae/En/OpenData/Pages/home.aspx>.

The Islamic Development Bank (IsDB), which partners with Gulf development agencies, offers scholarships to students from its least-developed member states - such as Somalia and Djibouti – and to Muslim communities in non-member states like Ethiopia and Kenya. ⁴¹⁵.

415. Islamic Development Bank, <https://www.isdb.org/scholarships/scholarship-programs>

Beyond education, a growing number of projects aim at preserving and rehabilitating cultural heritage in the Horn while projecting soft power. These efforts —often led by Türkiye—highlight shared Islamic and Ottoman legacies. The Turkish Cooperation and Coordination Agency (TIKA) has invested in symbolic restoration projects such as the Suakin Island in Sudan, once a prominent hub for pilgrims en route to Mecca; the mausoleum of Al-Najashi, the 7th-century Axumite king who offered refuge to early Muslims; and the former Ottoman consulate in Harar, Ethiopia, a city central to Islamic scholarship in East Africa⁴¹⁶. Qatar also leverages cultural and sports diplomacy, including sponsorship of ‘sport for peace and development’ initiative aiming at fostering unity and youth engagement in fragile environments⁴¹⁷.

Another potent tool of influence is the media. Outlets such as Al Jazeera (Qatar) and the Turkish TRT and Anadolu Agency (Türkiye) have expanded their African coverage with a view to projecting a distinct brand of cooperation with the continent. TV and radio channels from Egypt, Gulf countries, and Türkiye broadcast across the HoA via satellite infrastructure such as Nilesat (Egypt), Arabsat (based in Saudi Arabia), and Eutelsat (France). Audiences in the region have access to a wide array of programming in Arabic, Turkish, Swahili, and English. Ethiopia maintains its own satellite platform, Ethiosat, mostly for a domestic coverage so far.⁴¹⁸

The film industry has emerged as a further arena of cultural exchange. The Doha Film Institute (Qatar), the Red Sea Film Foundation (Saudi Arabia), and the Sanad Abu Dhabi Film Fund (UAE) offer grants, training, and fellowships to filmmakers from both the Arab world and Africa.⁴¹⁹ However, access to such opportunities seems to be highly influenced by language, with a stark privileged access for Arabic-speaking populations in Sudan, Somalia, Egypt, and Djibouti that also reinforces cleavages with non-Arabic-speaking populations in the Horn countries.

Cooperation, Disagreements and Rivalry

Beneath this dense web of exchanges lies a more complex dynamic. Cultural exchanges across the Red Sea represent a strategic tool through which competition is expressed and influence projected, mirroring and sometimes magnifying the region’s strategic rivalries. Thus, while Gulf countries, Türkiye and others compete for influence across the HoA, countries in the Horn actively navigate these rivalries to advance their own strategic interests.

Cultural cooperation often reflects this broader strategic competition with a stark preference for bilateral engagements that resonate with specific political or economic objectives. For instance, Türkiye’s cultural and strategic engagement is concentrated in

416. Tika, ‘Turkey renovating historic Ottoman-era city in Sudan’, 24 January 2018; ‘Restoration Work Commences at Najashi Complex’, 3 October 2024; ‘TIKA Restores the Century-old Ottoman Consulate’, 11 November 2019, <https://tika.gov.tr/en/detail-tika-restores-the-centuryold-ottoman-consulate/>

417. UN, Department of Economic and Social Affairs; Reliefweb, ‘Under the umbrella of the Sport for Development and Peace initiative Save the Dream, Qatar Fund for Development, and Qatar Charity launched the first phase of “Saving Children’s Dreams in Somalia through Sport”, 31 January 2023.

418. Nilesat, Nilesat 301 Coverage, <https://nilesat.org/fleet/nilesat301/>; Arabsat, Fleet, <https://www.arabsat.com/the-fleet/>; Eutelsat, Satellites, <https://www.eutelsat.com/en/satellites.html>.

419. UNESCO, The African film Industry: trends, challenges and opportunities for growth, 2021, <https://doi.org/10.58337/DEJM2927>.

Somalia, without undermining its traditional ties with Ethiopia. Meanwhile, the UAE has strengthened its footprint in Somaliland and Puntland, while also seeking to maintain relations with Ethiopia and Eritrea, a dual track that creates anxiety in both Addis Ababa and Asmara. Qatar and Saudi Arabia, by contrast, have pursued a more diversified engagement with the region, cultivating ties with states and regional organisations alike - particularly in the context of mediation efforts, such as those addressing the Ethiopia-Tigray conflict or the war in Sudan. This contrasts with the UAE's hands-on approach, including relations with the Rapid Support Forces in Sudan and with Eritrea—ties initially cultivated during the Yemen and Ethiopia-Tigray conflicts.

Preferential bilateral relations are also reflected in the cultural domain that effectively complements diplomatic outreach and economic investments, as in the case of the UAE connecting education with the need to create skilled workers.⁴²⁰ Religious outreach in the HoA also constitutes another pillar of the involvement of Gulf countries and Türkiye where moderate interpretations of Islam, mostly promoted by the UAE and Türkiye, rival with more conservative currents associated with Saudi Arabia and Qatar.

Meanwhile, African states have increasingly leveraged these rivalries to gain support for their own priorities: Somaliland seeks backing for its claims to independence; Somalia for support to preserve its territorial integrity; and Ethiopia for access to a seaport or neutrality over controversial issues such as the Grand Ethiopian Renaissance Dam (GERD), which has become a major point of friction between Addis Ababa and Cairo. The same applies to long-standing regional tensions, such as those between Eritrea and Ethiopia, where Gulf countries are often courted or pressured to take sides - implicitly or explicitly.

Relations across the two shores are also shaped by migration from the Horn to Gulf countries. Source of tensions particularly between Ethiopia and KSA, migration governance seems to only hold the potential for developing people-to-people connectivity. Migration from the HoA has long affected labour markets in Gulf countries, especially in Saudi Arabia. As of 2022, over 2.5 million migrants from Egypt (1.4 million), Sudan (820,000), Ethiopia (159,000), Eritrea (47,000), and Somalia (45,700) were registered in the Kingdom⁴²¹. However, this relationship has also been marred by abuse, legal restrictions, detention and forced repatriations especially for irregular migrants.⁴²² Between 2013 and 2018, Ethiopia restricted outbound domestic workers due to reports of abuse in the Gulf. More recently, reports of killings at the Saudi-Yemeni border triggered Ethiopia to request a joint investigation⁴²³. While Saudi Arabia and Ethiopia have since signed labour agreements to regulate recruitment and improve worker protections, irregular migration remains widespread as the waves of returnees. Saudi Arabia has also moved to limit temporary visas for 14 nationalities—including Ethiopians—during the Hajj season, to control overstays.⁴²⁴

420. Emirates News Agency, 'Digital School launches 'Skills Academies' initiative, 14 February 2025, <https://www.wam.ae/en/article/bi75qiu-digital-school-launches-skills-academies>.

421. Saudi Arabia, General Authority for Statistics, Census 2022, nationality statistics, <https://www.stats.gov.sa/en/w/%D8%A7%D9%84%D8%AC%D9%86%D8%B3%D9%8A%D8%A9-2?category=127396&tab=436327>.

422. IOM Regional Office for the East and HoA, 'Return of Ethiopian migrants from the Kingdom of Saudi Arabia: midyear overview 2023; Adugna G., 'Half a million Ethiopian migrants have been deported from Saudi Arabia in 5 years - what they go through', The Conversation, 4 December 2022.

423. Arab News, Ethiopia lifts ban on domestic workers moving overseas, 1 February 2018; Human Rights Watch, "They Fired on Us Like Rain"

Saudi Arabian Mass Killings of Ethiopian Migrants at the Yemen-Saudi Border, 21 August 2023.

424. Fana, Ethiopia established legal employment agreements with various countries - MFA, 4 April 2024; IOM, Funding Needed to Assist Over 100,000 Ethiopian Migrants Returning from the Kingdom of Saudi Arabia, 30 March 2022; Deloitte, New Visa Policy Restricts Multiple-entry Visas for 14 Countries, 11 February 2025.

Competition among regional powers also extends into the realm of civilisational narrative and historical prestige. Many states try to assert their place in a shared historical space - recalling the grandeur of Ancient Egypt, the Ottoman Empire, the Ethiopian Empire, and the birthplace of Islam. These narratives often serve as sources of national pride and cultural legitimacy. However, they also generate friction, especially when they are perceived as signalling neo-imperial ambition. Ethiopia's emphasis on its imperial legacy, for instance, can raise alarms in Eritrea and Djibouti, where memories of conflict and domination linger. In contrast, the UAE pursues a more pragmatic and investment-focused strategy, including investments in education as a way to create a skilled labour force. Qatar seeks to present itself as a neutral mediator, carefully avoiding entanglement in disputes in the HoA. This differentiation in cultural posture reflects deeper strategic preferences - and helps explain the varied forms of influence exercised across the region.

In sum, while cultural initiatives may foster people-to-people linkages, they largely unfold within frameworks shaped by geopolitical calculations and asymmetrical power dynamics. Rather than generating broad-based convergence, these initiatives often reinforce existing fault lines between the two shores. Thus, Gulf states leverage cultural soft power to project influence in the Horn, while Horn governments tactically leverage engagement and competition to attract resources or secure diplomatic support in pursuit of their own national agendas.

Outlook and Conclusions: Where to Next?

Rivalries and preferences for bilateral relations currently make broader cooperation across the Red Sea a complex endeavour. Competition among Gulf countries and Türkiye to expand influence intersect with regional disputes, creating an intricate landscape of relations. Cultural ties largely support these dynamics and reproduce ancestral asymmetries between African countries and the Gulf and Türkiye. Cultural ties, in fact, seem to depict African countries mostly on the receiving end of these exchanges, while visa and migration policies clearly define asymmetrical relations. Diasporas from African countries to the Gulf states also struggle to integrate in the host country as demonstrated by Ethiopian workers in Saudi Arabia.

Nonetheless, the dense web of cultural, educational, and media ties across the Red Sea reveals significant untapped potential. Cultural cooperation can serve as both a mechanism for soft diplomacy and a catalyst for economic development - particularly in creative industries such as film, music, fashion, and literature. In these fields, the untapped potential is huge not only for people-to-people relations, but also in terms of economic investment and the possibility for rebalancing relations over time. However, these investments would require expanding access for African artists and industries beyond the Arabic speaking communities. In this regard, the creation of national agencies in the Horn states could be a positive step to develop partnerships with the Gulf countries and beyond.

There is significant potential for research collaboration, particularly in preserving the environmental ecosystem of the Red Sea, developing museums and heritage initiatives, and promoting cross-border tourism. Technical cooperation in these areas would require not only adequate resources but also strong political will to establish genuine consortiums across the Red Sea's shores. One of the most challenging areas may be historiographic

research. While it offers opportunities for deeper cooperation, it would also involve confronting contentious aspects of a shared past - where narratives of imperial grandeur often obscure difficult issues such as slavery.

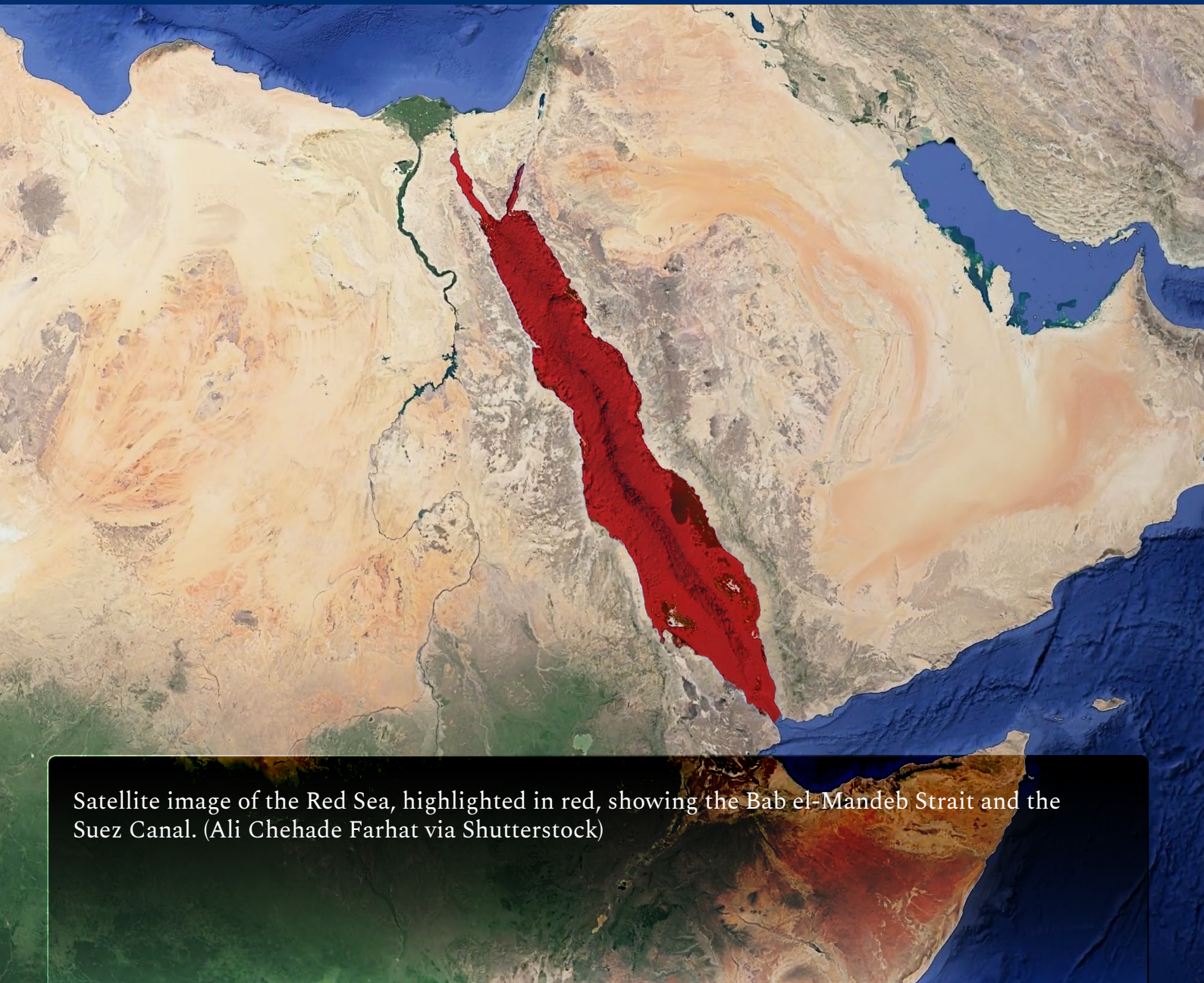
Mobility and the role of diasporas in host states arguably represent additional fields of cooperation. Beyond labour agreements, diasporas can play a significant role in fostering mutual understanding and the development of cultural ties. However, such cultural development requires a degree of stability and trust - conditions often undermined by conflict and regional asymmetries.

States should recognise that rivalry ultimately erodes the very sectors —tourism, education, and the creative industries—that could generate long-term regional benefits. Exacerbated tensions hamper the ability to harness this potential. By depoliticising areas such as education and heritage preservation, and by fostering joint ventures in creative fields and academic research, countries along the Red Sea can promote mutual awareness, intercultural respect, and economic resilience.

Conclusions

Pathways from Competition to Cooperation

By Mehari Taddele Maru, Luigi Narbone, Carlo Palleschi



Satellite image of the Red Sea, highlighted in red, showing the Bab el-Mandeb Strait and the Suez Canal. (Ali Chehade Farhat via Shutterstock)

Conclusions: Pathways from Competition to Cooperation

The Red Sea is characterized by an inextricable web of geopolitical rivalries, maritime insecurity, competition for transboundary and fixed resources, wars and state fragility, migration and humanitarian crises. However, this eBook shows that the Red Sea region also presents immense opportunities for Africa, the Arab and the rest of the world. What is needed to seize the potential convergences is to move away from fragmented, zero sum, or reactive approaches toward a cooperative framework that links maritime governance, economic opportunity, and political stability across the basin.

The recent Red Sea crisis has paradoxically shown that shared vulnerabilities, if effectively managed, can become catalysts for convergence rather than fragmentation. Moving in this direction requires the region to undertake three strategic shifts. First, reconnect land and sea. Insecurity at sea often originates on land and, in turn, feeds back ashore. Breaking this enduring cycle demands mutually reinforcing efforts: stabilizing governance on land while deepening maritime cooperation at sea. Second, prioritize the Blue Economy. Trade represents the most accessible entry point for confidence-building. By harmonizing port procedures and investing in connective maritime and logistics infrastructure, regional states can transform low-hanging fruits into durable economic interdependence. Third, rebalance the scale of agency. Sustainable stability depends on African ownership. HoA states are not merely passive actors, but their agency remains under-leveraged. A more durable regional order depends on elevating their role as consistent co-designers of the region's security and economic architecture.

Establishing a Red Sea Development and Security Framework

An effective strategy for the Red Sea region necessitates an integrated land-sea security framework, inclusive of both sides of the shore, that promotes collaboration among coastal and hinterland states. A comprehensive Red Sea Development and Security Framework should be established on a foundation of international law, while reinforcing existing normative and collaborative frameworks under the UN, AU, the Arab League, GCC, IGAD, and the Red Sea Council. The framework should include the Djibouti Code of Conduct and its Jeddah Amendment for piracy suppression, as well as the African Union Integrated Maritime Strategy, which ensures legal coherence while building on proven cooperative mechanisms.

By anchoring maritime security within a broader vision of regional integration and shared development, the African and Arab sides of the Red Sea can transform a zone of competition into a corridor of peace and prosperity. The following proposals outline potential pathways to foster stability, resilience and shared prosperity across the Red Sea region, advancing cooperative and sustainable security across both shores.

Promoting Red Sea Trade Corridors and Blue Economy Initiatives

Economic cooperation offers an accessible and less politicized entry point for confidence-building. Trade and Blue Economy initiatives can align Gulf investments with African development priorities, creating shared stakes in regional stability.

Regional states could, for instance, explore the establishment of a Red Sea Trade Facilitation Framework aimed at reducing customs barriers, harmonizing port procedures, and introducing mutual recognition of security certifications. Such a framework would lower transaction costs, strengthen supply chains, and foster economic interdependencies that, in turn, reinforce security cooperation. Given the decline in vessel calls and cargo volumes at key ports and infrastructure nodes following recent Houthi attacks, revitalizing maritime corridors is essential and will require coordinated investments in security, operational efficiency, and resilience. This framework should also explicitly account for the role of major commercial actors and sovereign wealth funds. The private sector must be recognized as a full-fledged regional actor and a stabilizing force: when empowered and meaningfully consulted, it enhances economic resilience and helps mitigate structural conflict drivers such as unemployment and poverty.

Dialogue Initiatives to Harvest Low-hanging Fruits

Further initiatives could help reframe maritime governance as a developmental enterprise rather than a purely defensive one, fostering a positive-sum approach to regional engagement. This shift should be gradual, beginning with the promotion of dialogue and coordinated experimentation toward a cooperative framework that links maritime governance, economic opportunity, and political stability. Track II and Track 1.5 initiatives could play a critical role in this process by creating political space for dialogue, building trust among stakeholders, and helping to stabilize existing fault lines.

Climate, water, food, and energy security offer strong entry points for such initiatives. Both sides of the Red Sea face existential climatic risks stemming from worsening water, food, and energy insecurity. These shared threats create powerful incentives for cooperation through joint investments, data exchange, and collaborative resilience programs, helping move away from the asymmetric relationships described in previous chapters. The HoA holds substantial water reserves, significant renewable energy potential, and a young workforce. Together, these complementary assets can underpin cross-regional projects such as solar-powered desalination plants, food corridors, and hybrid energy agreements.

These initiatives could eventually lead to the establishment of a joint Horn of Africa–Gulf water, food, and energy data platform, particularly as regions on both shores are emerging from the most severe drought in four decades. A desalination and brine-management initiative could provide a testing ground for lower-energy pilot projects and safer discharge methods, drawing on Gulf experience, where GCC countries host roughly forty percent of global desalination capacity. In parallel, a skills and maintenance fund could support the training of local utilities, engineers, and meteorological teams on both shores, strengthening long-term operational capacity and shared resilience.

Developing Integrated Coast Guard Training and Harmonized Standards

Another area for common action that represents a low-hanging fruit is the strengthening of national and regional coast guard capacities. A regional coast guard capacity-building initiative could enhance collective maritime governance and operational readiness. Partnerships could be explored with existing institutions such as the Regional Maritime Information Fusion Centre in Madagascar and the Regional Cooperation Agreement on Combating Piracy and Armed Robbery against Ships in Asia (ReCAAP) in Singapore, which offer valuable lessons in information sharing and coordinated response mechanisms. Such initiatives and programs should emphasize harmonized standards for maritime law enforcement, search and rescue operations, environmental protection, and counter-trafficking measures. Joint training exercises involving personnel from both shores would help build personal relationships and mutual understanding that transcend institutional boundaries.

Building an Inclusive ‘Big Tent’ Red Sea Maritime Stability Forum

A further step could be the creation of a “Big Tent” Red Sea Maritime Stability Forum—a platform possibly established under the joint auspices of IGAD, the AU, the UN, the GCC, and the League of Arab States. Such a forum would promote inclusive consultation and coordination, providing a venue for constructive dialogue, confidence-building, and the alignment of national and regional strategies. Regional states should also seek the backing of global stakeholders, including the United States, the EU, and China, for these initiatives. The EU, which has a strategic interest in Red Sea stability, could play a particularly important role by supporting the process politically, diplomatically, and potentially financially.

This platform could help discourage unilateral actions that risk exacerbating instability on either side of the Red Sea and across the wider maritime domain. Crucially, hosting should rotate between African and Gulf states to reinforce shared ownership and prevent any perception of external imposition. The rotating chairmanship would ensure that both shores have an equal voice in shaping the regional security architecture. The framework could also help mitigate the consequences of power asymmetries by limiting the ability of any state to assert dominance or build exclusionary partnerships. If maritime zones are selectively invested in or securitized in favor of compliant partners, asymmetries will deepen, reducing African ports to peripheral service nodes. By contrast, if the crisis catalyzes joint governance, risk-sharing mechanisms, and co-management of maritime infrastructure, asymmetries could gradually decline, fostering trust and a stronger sense of shared responsibility.

The implementation of this initiative must be gradual, pragmatic, and responsive to local conditions. Quick wins should be pursued to build momentum and, privileging result-oriented initiatives that can demonstrate the value of cooperation. The overall objective of this process should be the emergence of a longer-term strategic vision shared by all parties.

Key areas of engagement for this forum may include the following.

- Supporting peace processes on both sides of the Red Sea to end ongoing conflicts and prevent new ones, including addressing the maritime dimensions of those conflicts.
- Developing integrated approaches that combine conflict resolution, governance reform, economic development and cooperative maritime security measures.
- Adopting a more humane and rights-based joint migration partnership, a pivotal step in reinforcing the shift from competition to cooperation.

Strengthening African Agency through Coordinated Diplomacy

One precondition for this process is the strengthening of African agency. The long-term stability of the Red Sea region will fundamentally depend on the leadership, policy coherence, inclusive consultative mechanisms and capabilities of the states on both sides.

Strengthening African agency means ensuring that Horn states are not merely recipients of external initiatives, but active co-designers of the regional architecture. This requires building diplomatic capacity, establishing clear red lines regarding sovereignty and territorial integrity, and developing mechanisms for intra-African consultation before engaging with external partners. The goal is to transform asymmetric relationships into more balanced partnerships, based on mutual respect and shared interests.

To offset such asymmetries, the HoA states should develop unified and proactive positions in negotiations with MECs and extra-regional partners, ensuring that engagements advance mutual benefits and transparency. This requires moving beyond individual bilateral deals that might create competition among states on both sides, towards a coordinated, norm-based approach that maximizes collective bargaining power.

The proposals outlined in this e-book—establishing inclusive forums for dialogue, promoting economic cooperation, building maritime capacity, strengthening African agency, fostering mobility and addressing irregular migration humanely, and cooperating on water, food, and energy security—represent concrete steps toward realizing the vision of a “Red Sea divided by waters but united by opportunities.” They offer entry points for discussion and experimentation, recognizing that the path to regional stability must be collectively determined by all stakeholders.

List of Acronyms

AFRICOM – United States Africa Command
AQAP – Al-Qaeda in the Arabian Peninsula
ASPIDES – European Union Naval Mission in the Red Sea (EUNAVFOR ASPIDES)
ATALANTA – European Union Naval Force Somalia (Operation Atalanta)
AU – African Union
AUC – African Union Commission
AUSSOM – African Union Transition Mission in Somalia (ATMIS successor – if contextually relevant)
BAPS – Berbera–Addis Ababa Port and Corridor System (context-dependent)
BRI – Belt and Road Initiative
BRICS – Brazil, Russia, India, China, and South Africa
CENTCOM – United States Central Command
CEPA – Comprehensive Economic Partnership Agreement
CIB – Commercial International Bank (Egypt)
CMF – Combined Maritime Forces
COVID-19 – Coronavirus Disease 2019
CSDP – Common Security and Defence Policy (European Union)
DCT – Doraleh Container Terminal (Djibouti)
ECOWAS – Economic Community of West African States
ENDF – Ethiopian National Defense Force
ESG – Environmental, Social, and Governance
EU – European Union
EUISS – European Union Institute for Security Studies
EUNAVFOR – European Union Naval Force
FDI – Foreign Direct Investment
GCC – Gulf Cooperation Council
GDP – Gross Domestic Product
GERD – Grand Ethiopian Renaissance Dam
GI-TOC – Global Initiative Against Transnational Organized Crime
GPAI – Global Partnership on Artificial Intelligence (possibly linked to digital sections)
HoA – HoA
ICCPR – International Covenant on Civil and Political Rights
ICESCR – International Covenant on Economic, Social and Cultural Rights
IGAD – Intergovernmental Authority on Development
ILO – International Labour Organization
IMEC – India–Middle East–Europe Economic Corridor
IMSC – International Maritime Security Construct
INGO – International Non-Governmental Organization
IOM – International Organization for Migration
IOR – Indian Ocean Region
IORA – Indian Ocean Rim Association
ISS – Institute for Security Studies
IUU – Illegal, Unreported, and Unregulated (fishing)
KALRO – Kenya Agricultural and Livestock Research Organization
KEMFRI – Kenya Marine and Fisheries Research Institute

KSA – Kingdom of Saudi Arabia
 LAPSET – Lamu Port–South Sudan–Ethiopia Transport Corridor
 LNG – Liquefied Natural Gas
 MEC – Middle Eastern Country
 MENA – Middle East and North Africa
 MEF – Middle East Forum (contextual)
 MPA – Marine Protected Area
 NATO – North Atlantic Treaty Organization
 NAVCENT – United States Naval Forces Central Command
 NCP – National Congress Party (Sudan)
 NEOM – Cross-border megacity project in northwestern Saudi Arabia
 NEPAD – New Partnership for Africa’s Development
 OECD – Organisation for Economic Co-operation and Development
 PIF – Public Investment Fund (Saudi Arabia)
 PPP – Public–Private Partnership
 QUAD – Quadrilateral Security Dialogue (Australia, India, Japan, United States)
 RSF – Rapid Support Forces (Sudan)
 SADC – Southern African Development Community
 SAF – Sudanese Armed Forces
 SAIS – School of Advanced International Studies (Johns Hopkins University)
 SFD – Saudi Fund for Development
 SOAS – School of Oriental and African Studies (University of London)
 TDF – Tigray Defense Forces
 TIKA – Turkish Cooperation and Coordination Agency
 TPLF – Tigray People’s Liberation Front
 TRT – Turkish Radio and Television Corporation
 UAE – United Arab Emirates
 UK – United Kingdom
 UN – United Nations
 UNDP – United Nations Development Programme
 UNEP – United Nations Environment Programme
 UNU-CRIS – United Nations University – Institute on Comparative Regional Integration Studies
 US – United States
 USA – United States of America
 USAID – United States Agency for International Development
 USD – United States Dollar
 WANA – West Asia and North Africa (region)
 ZTE – Zhongxing Telecommunications Equipment Corporation

ABOUT

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The Middle East Council on Global Affairs (ME Council) is an independent, non-profit policy research institution based in Doha, Qatar. The ME Council produces policy-relevant research, convenes meetings and dialogues, and engages policy actors on geopolitical and socioeconomic issues facing the Middle East and North Africa (MENA) region. The ME Council serves as a bridge between the MENA region and the rest of the world, providing a regional perspective on global policy issues and establishing partnerships with other leading research centers and development organizations across the MENA region and the world.

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Through a focus on geopolitics and geoeconomics, socio-political dynamics, environment, and culture, it connects researchers, practitioners, and civic actors from across the region

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The Pan African Agenda Institute (PAAI) is a deliberative platform and think tank on the Pan-African agenda, enabling Africa to realize a dynamic, peaceful, prosperous, and integrated future. Its priority thematic areas include: Governance, Peace and security, Geopolitics and multilateralism, and Human development.

■ DISCLAIMERS:

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