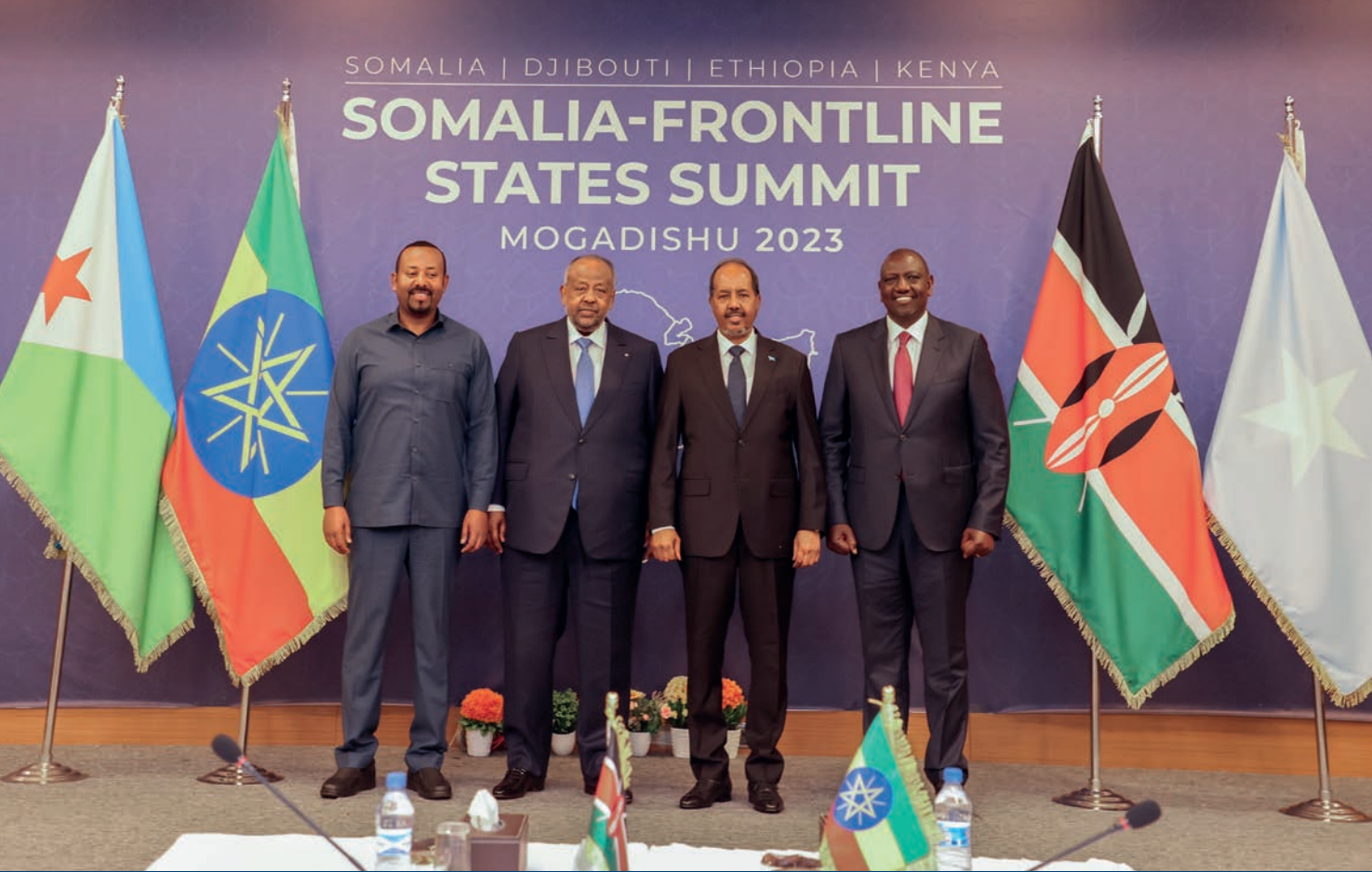




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THE HORN OF AFRICA IN 2025: GEOPOLITICAL COMPETITION, MARITIME SECURITY AND ENERGY

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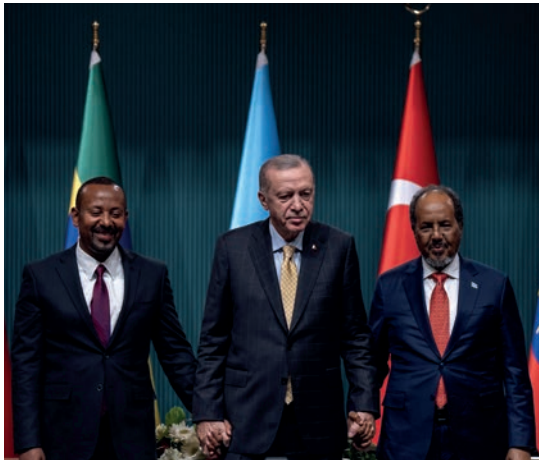
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LIST OF ABBREVIATIONS

AFRICOM	United States Africa Command
AU	African Union
AUSSOM	African Union Support and Stabilization Mission in Somalia
IGAD	Intergovernmental Authority on Development
GCC	Gulf Cooperation Council
GERD	Grand Ethiopian Renaissance Dam
NISA	National Intelligence and Security Agency
OIC	Organization of Islamic Cooperation
OLA	Oromo Liberation Army
RSF	Rapid Support Forces
SAF	Sudanese Armed Forces
SOFA	Status of Forces Agreement
SSC	Sool, Sanaag and Cayn
TPAO	Turkish Petroleum Corporation
TPLF	Tigray People's Liberation Front
UAE	United Arab Emirates



INTRODUCTION

The year 2025 marks a critical turning point for the Horn of Africa, characterized by deepening political fragmentation, militarization and intensifying global competition. Throughout the year, the boundaries between domestic instability and regional rivalry along the western flank of the Red Sea basin became increasingly blurred. The security architecture of the Horn of Africa, which had been sustained through post Tigray War reconciliations and periodic cooperation, has, by 2025, come under increasing strain from the resurgence of insurgent movements, maritime competition, and energy driven regional realignments.. The emerging landscape reflects not merely a new cycle of crises, but the consolidation of a new strategic order shaped by security-centered diplomacy, proxy alliances and the long-term entrenchment of external actors in the region.

At the center of this transformation lies Ethiopia's effort to reassert its regional centrality. Simultaneous internal crises in the Amhara, Oromia and Tigray regions exposed the fragility of post-Tigray war governance and the weakening of federal authority. The erosion of the Pretoria Agreement framework, the renewed intensification of insurgent attacks and shifting regional alignments transformed Ethiopia's domestic instability into a broader regional risk factor. Ethiopia's maritime and energy ambitions, including its pursuit of access to the Red Sea and the operationalization of the Grand Ethiopian Renaissance Dam (GERD), symbolized a transition from a defensive understanding of sovereignty toward a more assertive model of power projection. However, these initiatives also deepened tensions with Egypt and Eritrea while fueling an increasingly sharp contest between competing national narratives centered

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on the Nile and the Red Sea. In this regard, the repercussions of Ethiopia's alliance with the United Arab Emirates (UAE) became directly visible in the dynamics of the Sudan War.

Somalia entered 2025 attempting to balance efforts to transition from a fragile state structure toward a stronger centralized authority with expanding external engagement. Despite Al-Shabaab's renewed influence across the country's central regions, the federal government advanced institutional reforms and broadened its diplomatic partnerships. The Ankara Declaration, signed between Ethiopia and Somalia under Türkiye's mediation, represented a rare example of de-escalation in a region increasingly shaped by maritime competition and strategic rivalry. Somalia's deepening cooperation with Türkiye, particularly in the fields of defense and offshore energy exploration, further redefined the country's external orientation. Nevertheless, persistent fragmentation between federal and regional authorities, coupled with ongoing disputes over sovereignty in natural resource governance, continued to expose the limitations of state consolidation in Mogadishu. Meanwhile, Israel's recognition of Somaliland as the first state to do so in the final days of 2025 emerged as another destabilizing dynamic with potentially far-reaching regional implications.

Eritrea's reemergence as a geopolitical actor constituted one of the most significant developments of 2025. Long positioned as an isolated state, Asmara capitalized on shifting regional fault lines to restore its influence through expanding security ties with Egypt and Sudan. Eritrea's alleged arms support for the Sudanese Armed Forces (SAF), combined with its military build-up along the Ethiopian border, reflected a deliberate strategy centered on deterrence and coercive pressure against Ethiopia. Eritrea's eventual withdrawal from the Intergovernmental Authority on Development (IGAD) and its explicit rejection of Ethiopia's maritime claims signaled a new phase defined by uncompromising diplomacy. This dynamic positioned the country simultaneously as both a disruptive actor and a strategic pivot within the emerging regional balance.

Djibouti, by contrast, continued to serve as the Horn of Africa's quiet balancer and principal economic connectivity hub. Its ports, logistics networks and multilateral partnerships reinforced the country's role as a regional center of commerce and political coordination amid an increasingly fragmented environment. Nevertheless, Djibouti's efforts to manage overlapping alignments with Egypt, China and Gulf states while hosting multiple foreign military bases exposed the paradox of stability sustained through de-

pendency. In particular, its close ties with global actors enhanced Djibouti's political leverage in regional crises across the Horn of Africa. The country further expanded its maritime and energy partnerships, yet this also positioned Djibouti as an indispensable but fragile intermediary actor within the broader landscape of regional competition.

Beneath these state-level maneuvers, the maritime domain of the Horn of Africa increasingly emerged as the new center of geopolitical competition. Control over ports, maritime trade routes and coastal infrastructure became increasingly synonymous with political power. Ethiopia's discourse and policies surrounding its strategy for Red Sea access, Eritrea's rigid defense of coastal sovereignty and Egypt's efforts to strengthen Red Sea coordination collectively transformed maritime governance into a distinct arena of strategic contestation. The resurgence of piracy off the Somali coast, Ethiopia's increasingly assertive pursuit of maritime access and the militarization of the Bab al-Mandab Strait demonstrated that maritime insecurity had evolved into a phenomenon that both reflected and reinforced land-based rivalries. By the end of 2025, the Red Sea had become not only a commercial lifeline but also a strategic fault line linking Africa, the Gulf, Israeli expansionism and global power competition in unprecedented ways.

Energy competition added another layer to this broader restructuring process. Ethiopia's completion of the GERD and the launch of its nuclear cooperation with Russia, Somalia's offshore oil diplomacy with Türkiye and Djibouti's renewable energy initiatives collectively transformed energy from a developmental objective into a political instrument. The growing involvement of Gulf states and major powers, including the UAE, Saudi Arabia, Russia, China and the U.S., through investments and military infrastructure projects turned the Horn of Africa into a testing

ground for energy-linked influence competition.

These transformations also generated profound institutional consequences. The dysfunction of the IGAD, the fragmentation of African Union (AU) frameworks and the proliferation of bilateral military agreements collectively eroded regional cohesion. As states increasingly turned inward or aligned themselves with external actors, African-led diplomacy encountered mounting structural constraints. Nevertheless, limited breakthroughs such as the Amhara-Fano Peace Accord and the diplomatic de-escalation between Ethiopia and Somalia demonstrated that local mediation efforts remained possible, albeit on an extremely fragile foundation.

By the end of 2025, the Horn of Africa had fully evolved into a multilayered security arena in which land, maritime and energy politics had become inseparable. Ethiopia's assertive posture, Eritrea's militarization process, Somalia's strategic repositioning and Djibouti's central role, combined with the growing engagement of external actors, are collectively reshaping the region's balance of power. In this increasingly uncertain landscape, the stability of the Horn of Africa will ultimately depend on whether regional states can transform the divisions arising from their roles within the Red Sea and Indian Ocean systems, as well as from their alliances with external powers, into mechanisms of cooperation before those fractures reach an irreversible depth.

This report examines the evolution of the Horn of Africa's security and geopolitical order through three interconnected lenses. The first section, "Conflict Dynamics," analyzes the internal fragmentation of states and the rise of interstate rivalries reshaping the region's political core. The second section, "Maritime Security," explores the expansion of conflict into the maritime domain, demonstrating how naval power, access to the sea and the endur-

ing presence of external actors are redefining traditional alignments. The final section, "Energy and Geopolitical Dynamics," examines the intersection of resource politics, energy nationalism and great power competition, assessing the factors that have transformed the Horn of Africa into a critical node of global strategic rivalry. Taken together, these sections provide a comprehensive framework for understanding the transformation of this strategic geography into one of the world's most contested geopolitical arenas, shaped by ongoing struggles over sovereignty, access and influence.

CHAPTER I CONFLICT DYNAMICS



Smoke rises from a National Intelligence and Security Agency (NISA) building following an attack by al-Shabaab, Mogadishu, Somalia, Oct. 4, 2025.

In 2025, the Horn of Africa was shaped by deepening fragmentation, the resurgence of security crises and a widespread crisis of legitimacy. Across the region, fragile post-conflict arrangements following wars and disputes, including those related to Tigray and Somalia-Ethiopia tensions, gave way to processes of political realignment. As governments increasingly relied on coercive mechanisms to preserve their authority, insurgent groups expanded their spheres of influence. The year clearly demonstrated both the limitations of external mediation efforts and the enduring fluidity of local power structures.

Within this context, overlapping crises in Ethiopia transformed the country's political landscape into a mosaic of insurgencies and contested spheres of sovereignty. This process began with violence along the Afar border

following a January 2025 drone strike carried out by Djibouti in Elidar that resulted in the deaths of eight civilians.¹ The incident underscored the growing fragility of the regional security environment. Domestically, the Amhara conflict remained the epicenter of instability. Clashes between Fano insurgents and federal forces continued through midyear, while cities such as Bahir Dar and Gondar suffered extensive destruction.² Drone strikes, mass detentions and large-scale civilian displacement became defining features of the state's operational response. The Amhara-Fano Peace Accord³, signed in December under the mediation of the AU and the IGAD, emerged as a rare example of diplomatic success and carried symbolic significance for African-led de-escalation efforts, despite its limited scope.

1 "Ethiopia Reports Confirm Djibouti Drone Attack Kills Eight in Afar", Borkena, Feb. 3, 2025.

2 "Amhara Conflict Takes Heavy Toll on Civilians", Ethiopia Observer, April 14, 2025; "Ethiopian Govt Reportedly Deploys Tens of Thousands of New Forces to Gojjam", Borkena, June 28, 2025; "Fano Claims New Military Gains as Defense Force Paints Different Narrative", Borkena, Jan. 19, 2025; "Fano Announce Amhara Region Merger", Zehabesha, March 28, 2025; "Ethiopia's Govt Political Mobilization in Amhara Rallies in Many Cities", Borkena, June 29, 2025.

3 "Ethiopia Strengthening Efforts to Ensure Peace and Stability Nationwide", Ethiopian News Agency, Dec. 4, 2025.

During the same period, Tigray was drawn once again into a deepening cycle of turmoil. Rival factions within the Tigray People's Liberation Front (TPLF), led respectively by Debretsion Gebremichael and Getachew Reda, clashed in Mekelle and Adigrat. Parallel to these developments, the National Election Board ultimately annulled the TPLF's legal status after a prolonged process marked by the suspension of party activities, repeated warnings, and the party's failure to comply with electoral regulations. This development, combined with deepening divisions within the TPLF, further accelerated the rise of alternative political formations including the Tigray Liberal Democratic Party.⁴ In this context, Getachew Reda was reported to have aligned himself with Abiy Ahmed and was appointed senior adviser for East African affairs in April 2025.⁵ At the same time, intermittent armed clashes between factions loyal to the Addis Ababa government and separatist groups further weakened the Pretoria Agreement, while reports suggesting Eritrean cooperation with Debretsion's faction added a transnational dimension to instability in Tigray. The reopening of the Zalambessa border crossing toward the end of 2025, presented as a confidence-building measure, further deepened Addis Ababa's suspicions regarding Asmara's strategic intentions.

In Oromia, the insurgency led by the Oromo Liberation Army (OLA) continued to exert significant influence despite federal government claims of progress on the battlefield.

The organization's "Thousand Fronts Operation" launched in May, inflicted heavy losses and exposed the government's inability to secure a decisive military victory.⁶ The persistence of instability in Oromia highlighted the fragility of Ethiopia's federal structure, even as Prime Minister Abiy Ahmed sought to reinforce military centralization through the appointment of military administrators to regional governments in mid-2025. In parallel with these developments, Ethiopia launched the Defense Industry Development Initiative aimed at reducing foreign dependency and strengthening the state's sovereignty narrative through the domestic assembly of drones and armored vehicles.⁷

Eritrea repositioned itself as an increasingly divergent regional actor throughout 2025. Asmara expanded its military deployments along the Zalambessa and Assab corridors⁸, accused Ethiopia of pursuing expansionist policies⁹ and deepened coordination with Egypt and Sudan through a series of high-level engagements, including President Isaias Afwerki's visit to Cairo in October 2025.¹⁰ Eritrea also hosted joint consultations with Sudan on Red Sea security, contributing to the emergence of an informal trilateral framework aimed at balancing Ethiopia's regional ambitions. Domestically, Eritrea maintained its closed and repressive political structure; however, the visit of an Italian delegation in July 2025¹¹ was interpreted as a cautious signal of renewed engagement with the West. Asmara's withdrawal from the IGAD in December

4 Getahun Tsegaye, "Breaking News: Ethiopian PM Appoints Getachew Reda as Minister for East African Affairs", Borkena, April 11, 2025.

5 "Prime Minister Abiy Appoints Getachew Reda as Advisor on East African Affairs", Ethiopian News Agency (ENA), April 11,

6 "Oromo Liberation Army Claims It Killed Over 400 Govt Soldiers", Borkena, May 31, 2025.

7 "Ethiopia Expands Defence Capabilities with Homemade Drones", Nanyang Technological University, March 25, 2025.

8 "Ethiopia Reportedly Moving Heavy Weaponry to the Eritrean Border in the East", Borkena, July 2025.

9 "Eritrea's Isaias Accuses Ethiopia's Ruling Party of Pushing Oromummaa Ideology", Borkena, May 26, 2025.

10 "President Isaias Afwerki and President Abdel Fattah El-Sisi Meet and Hold Talks", Shabait, Oct. 30, 2025.

11 "President Isaias Afwerki Meets with High-Level Italian Delegation", Shabait, July 29, 2025.

formalized its estrangement from regional institutions and reinforced Eritrea's position as a dissociative actor within the Horn of Africa's evolving security architecture.

In Somalia, President Hassan Sheikh Mohamud's administration consolidated a series of regional diplomatic gains even as Al-Shabaab regained influence in several districts across the country's southern and central regions. In May, a coordinated air operation conducted jointly by Somalia and the U.S. targeted Daesh cells in Puntland,¹² while Puntland forces' elimination of the group's leadership emerged as a rare counterterrorism success.¹³ The recognition of the North East State of Somalia (SSC-Khaatumo) in August demonstrated Mogadishu's capacity to manage internal federal disputes through negotiation.¹⁴ Likewise, the agreement reached on Aug. 25 envisioning direct elections by 2026 marked a significant milestone in Somalia's broader normalization process.¹⁵ On the diplomatic front, Somalia's reported base proposal to the U.S. in March, which envisaged granting Washington exclusive access to key coastal facilities, generated domestic controversy while simultaneously underscoring Mogadishu's efforts to reinforce its renewed strategic significance.¹⁶ Although the initiative sparked internal debate, it also reaffirmed Somalia's growing geopolitical importance within the regional security landscape.

Despite being consumed by civil war, Sudan reemerged within the regional equation as a peripheral yet influential actor. The meeting

held in Asmara in April between General Abdel Fattah al-Burhan and Isaias Afwerki¹⁷ reaffirmed Sudan's alignment within the Egypt-Eritrea axis. Subsequent reports concerning arms shipments routed through Eritrea to Port Sudan, including drones and air defense systems supplied by external actors¹⁸, demonstrated the growing overlap between Sudan's internal conflict and the broader security dynamics of the Horn of Africa. Meanwhile, Ethiopia's expanding military engagement with the UAE highlighted Addis Ababa's deterrence capabilities within the framework of its maritime access strategy, while also leaving unresolved questions regarding the UAE's broader involvement in the Sudan War – issues that are likely to carry over into 2026.

The convergence of these crises produced a broader regional pattern of "militarized governance." Political leaders increasingly relied on security institutions to preserve their authority, while the distinction between political administration and warfare largely disappeared. As state capacity contracted, coercive power expanded, resulting in the entrenchment of a reactive rather than preventive model of governance.

INTERSECTING DYNAMICS

Three principal structural dynamics emerged in 2025 as the key forces connecting the Horn of Africa's multilayered crises.

First, governance and militarization became increasingly intertwined. From the appoint-

12 "Puntland Forces Capture Last ISIS Stronghold in Miraale Valley in the Cal Miskaad Mountains", Horseed Media, May 31, 2025.

13 "Senior ISIS-Somalia Leader Captured in Joint Puntland-U.S. Operation in Bari Region", Horseed Media, July 26, 2025.

14 "Interior Ministry Releases Statement on the Finalisation of the State Formation of the North-Eastern State of Somalia", SONNA, Aug. 31, 2025.

15 "Somalia's President and Opposition Leaders Reach Historic Election Agreement", Africanews, Aug. 26, 2025.

16 "Somalia Offers U.S. Exclusive Control of Air Bases, Ports", Reuters, March 28, 2025.

17 "Sudan's Burhan Discusses Conflict, Ties with Eritrean President in Asmara", Sudan Tribune, April 10, 2025.

18 "Eritrea Increases Support to Sudan's Regular Army, Arms Sent to Port Sudan via Asmara", Agenzia Nova, June 23, 2025.

The convergence of these crises produced a broader regional pattern of “militarized governance.” Political leaders increasingly relied on security institutions to preserve their authority, while the distinction between political administration and warfare largely disappeared.

ment of military figures to regional administrations in Ethiopia and initiatives aimed at domestic drone production, to Eritrea’s coercive diplomacy and Somalia’s security-centered state-building efforts, the boundary between governance and warfare steadily eroded. As civilian institutions weakened, security forces became the principal instruments of both legitimacy and repression.

Second, domestic politics became increasingly externalized. During this period, internal conflicts were transformed into instruments of regional leverage. Eritrea utilized its proximity to Tigray and Sudan as a strategic asset; Ethiopia mobilized nationalist narratives through maritime diplomacy; and Somalia leveraged security cooperation to attract investment and external support. In this context, the region’s domestic disputes evolved into arenas of international competition, as regional states pursued strategies of survival and influence through their engagements with global and regional actors, particularly Egypt, Türkiye, the UAE and the U.S.

The third dynamic was the erosion of mediation frameworks. The dysfunction of the IGAD, Eritrea’s withdrawal from the organization and the AU’s limited institutional capacity collectively weakened mechanisms for collective problem-solving. Con-

flict management increasingly became dependent on temporary and “issue-specific” diplomatic initiatives, as reflected in the Ankara Declaration and the AU and IGAD’s mediation efforts in the Amhara-Fano conflict. At the same time, disinformation and narrative warfare further undermined trust, rendering even the most basic de-escalation efforts diplomatically rare and increasingly difficult to sustain.

• **Renewed Fragmentation and Weak State Control**

The partial stability achieved following the Pretoria Agreement, signed in November 2022 between the Addis Ababa government and the TPLF to resolve the Tigray war, deteriorated significantly in 2025. Ethiopia faced multidimensional conflicts across the Amhara, Oromia and Tigray regions, each increasingly characterized by localized governance structures and insurgent authority. As the reach of central institutions contracted, armed groups gained growing influence over both political and security agendas.

• **The Return of Interstate Rivalry and Cross-Border Militarization**

Interstate rivalry once again emerged as a dominant regional dynamic. Relations between Ethiopia and Eritrea entered an overt phase of militarization, while Egypt and

Sudan deepened coordination with Asmara, forming an informal bloc centered on Red Sea security. Ethiopia's accusations of foreign interference and its troop deployments along the Assab Corridor demonstrated the reemergence of geography- and sovereignty-driven regional rivalries, particularly in response to Egypt's efforts to strengthen its deterrence posture against Ethiopia within the context of the GERD dispute.

- **De-escalation and Mediation Efforts**

Despite the broader regional crises, limited progress was achieved in de-escalation efforts. The Ankara Declaration contributed to regional stability by reviving dialogue between Ethiopia and Somalia, while the AU and IGAD-supported Amhara-Fano peace process demonstrated that regional mediation initiatives remain viable under favorable conditions.

- **Maritime and Geostrategic Realignment**

Ethiopia's pursuit of maritime access and Eritrea's uncompromising response elevated maritime issues into central determinants of regional security. Coastal competition linked to Red Sea access and Nile politics redefined both national priorities and external alignments across the region.

- **Militarized Politics and Strategic Uncertainty**

Across the Horn of Africa, political authority was increasingly sustained through coercive power rather than political consensus. States militarized governance structures as a mechanism of survival, replacing broader social contracts with security-based forms of legitimacy. This dynamic left the region trapped not in a state of open war, but within a fragile equilibrium defined by recurring mobilization cycles and reactive diplomacy.

STRATEGIC TRENDS AND THE OUTLOOK FOR 2026

Two principal developments defined the region's strategic trajectory throughout the year. The first was the rapid escalation of tensions between Ethiopia and Eritrea. What initially began as rhetorical confrontation evolved by midyear into military deployments supported by external actors. The second development was Somalia's dual-track trajectory. Despite persistent fragility in the security sphere, the country experienced an acceleration in political normalization. Al-Shabaab's renewed territorial gains in central regions stood in sharp contrast to Mogadishu's institutional progress, highlighting the uneven nature of the region's broader recovery process.

Looking ahead, Ethiopia is expected to remain the central gravitational force in the Horn of Africa. The country's ability to reconcile its internal divisions and manage post-conflict transition processes will play a decisive role in shaping the region's security trajectory. In Somalia, the success of federal consolidation will largely depend on whether tactical counterterrorism gains can be translated into sustainable governance stability. Meanwhile, Eritrea's increasing isolation, institutionalized through its withdrawal from the IGAD, risks exacerbating rather than containing regional conflict spillover. In this environment, Djibouti has emerged as a particularly significant regional actor due to its institutional stability and its ability to skillfully pursue a balancing strategy among global and regional powers while leveraging its geographical advantages.

Among the most likely flashpoints are the Afar Corridor, where economic disruptions threaten the strategic relationship between Ethiopia and Djibouti; the al-Fashaga border zone,

where tensions between Sudan and Ethiopia could once again escalate; and the Gedo region along the Somalia-Kenya frontier, where persistent security vacuums continue to generate instability. The Horn of Africa entered 2026 not in a state of open war, but under conditions of pre-war positioning. This reflects a tense equilibrium in which the boundaries between deterrence, provocation and survival have become dangerously blurred.

Table 1: Security Trends and Regional Stability Indicators in the Horn of Africa, 2025

Indicator	Early 2025	Mid-2025	Late 2025
Internal Conflict Intensity (Ethiopia)	▲	▲▲	●
Cross-Border Tensions (Ethiopia-Eritrea-Sudan)	●	▲	▲▲
Armed Group Activity (OLA, Al-Shabaab)	—	▲▲	—
Diplomatic Initiatives (Regional)	▲	●	●
Regional Stability Index	●	●	▲▲

Symbol Legend

- ▲ Escalation — The situation is deteriorating or intensifying.
- ▲▲ High Escalation/Critical Tension Level — Rapidly worsening developments with broader regional implications.
- Volatility/Uncertainty — A period characterized by temporary instability or mixed trends.
- Stagnation or Fragile Equilibrium — Limited progress or an unstable level of stability.
- Continuity — No significant change observed in the situation.
- Stability/Positive Trajectory — An improving security and diplomatic environment.
- Collapse/Severe Regression — A breakdown of stability or conditions reaching crisis level.

In conclusion, the data presented in Table 1 indicate that the security environment in the Horn of Africa throughout 2025 followed not a linear trajectory of improvement, but rather a volatile and increasingly fragile course overall. While conflict dynamics within Ethiopia intensified gradually during the early stages of the year, the simultaneous escalation of internal security crises and the growing concentration of rhetoric and military mobilization along the Ethiopia-Eritrea-Sudan axis by midyear demonstrated that the regional security complex was becoming increasingly interconnected through mutually reinforcing risks. The growing level of coordination among armed actors, particularly the OLA and Al-Shabaab, suggests that weaknesses in state capacity continued to fuel cross-border security threats and generated a reciprocal reinforcement effect between domestic crises and regional rivalry dynamics.

Although diplomatic initiatives did not disappear entirely throughout the year, limited progress achieved through the Ankara process and AU and IGAD mediation efforts provided a constrained but important balancing mechanism for crisis management. However, by the end of the year, the rising risk of cross-border confrontation and the deterioration of the regional stability index to an "extremely fragile" level demonstrated that security risks had acquired a structural character exceeding the capacity of existing diplomatic mechanisms. Taken together, the data suggest that 2025 can be understood as a year of "cumulative security crisis" in the Horn of Africa, in which domestic conflicts, cross-border rivalries and weak diplomatic outcomes simultaneously reinforced broader regional instability.

CHAPTER II MARITIME SECURITY



As Somalia continues its reconstruction following decades of conflict, it is solidifying its position as a burgeoning regional hub.

In 2025, the maritime domain emerged as the principal arena of competition, diplomacy and influence projection across the Horn of Africa. Control over ports, maritime trade routes and Red Sea governance evolved beyond technical concerns to become matters directly linked to sovereignty and national identity. The interaction between coastal access, naval modernization and foreign partnerships transformed the Red Sea and the Gulf of Aden from commercial transit corridors into a geopolitical fault line.

Ethiopia's maritime ambitions dominated the regional agenda throughout the year. The completion of the GERD accelerated Addis Ababa's pursuit of maritime access, while this objective was increasingly reframed domestically as a matter of historical destiny. The inauguration of the Ethiopian Naval Force Headquarters in Addis Ababa and the training center in Bishoftu¹⁹ symbolized the reemergence of a

national navy. Russia's support for simulation and planning systems, Türkiye's contributions in military training and security equipment, and China's provision of logistical support collectively added operational depth to this restructuring process. At the same time, these developments generated growing regional concern. Eritrea and Egypt rejected Ethiopia's inclusion in Red Sea governance frameworks, arguing that maritime security should be shaped exclusively by littoral states.²⁰ Djibouti similarly²¹ aligned itself with this position, presenting itself as a regional balancing actor while challenging Ethiopia's broader strategic objectives.

Eritrea responded by reinforcing its posture along the coastline. Deepening coordination with Egypt, particularly through high-level diplomatic engagements including visits by Eritrean leadership to Cairo²², demonstrated Asmara's determination to expand its strategic relevance

19 "Ethiopian Defense Force Inaugurates Navy Headquarter in the Capital Addis Ababa", Borkena, Sept. 6, 2025.

20 "Eritrea, Egypt Reject Non-Coastal States' Role in Red Sea Security", Addis Standard, March 24, 2025.

21 "Ethiopia News Analysis: Amid Ethiopian Sea Claims, Egypt and Djibouti Reaffirm Red Sea Control", Borkena, Sept. 24, 2025.

22 "Egypt Affirms Support for Eritrea's Sovereignty, Territorial Integrity Amid Tension with Ethiopia over Sea Access", Anadolu Agency, Sept. 30, 2025.

within Red Sea security dynamics. Coordination with Egypt in the fields of port access and defense further strengthened a de facto alignment aimed at constraining Ethiopia's regional influence. Meanwhile, Italy's decision to resume technical dialogue with Eritrea²³ signaled a cautious reengagement with the West and contributed to the diversification of Asmara's foreign policy options.

Djibouti further consolidated its position as the indispensable maritime hub of the Horn of Africa. Owing to its strategic location along the Bab al-Mandab Strait, the country continued to function as a critical interface between African trade and global security flows. In 2025, Djibouti signed long-term agreements with Saudi Arabia for the "Red Sea Gateway Terminal" and the "Port of Tadjourah,"²⁴ deepened cooperation with Egypt in port development and maritime security²⁵, and welcomed a new Chinese-backed LNG export project.²⁶ In addition, by hosting the Red Sea Maritime Security Talks in November 2025, Djibouti revived plans aimed at establishing a coordination mechanism linking the Horn of Africa with the broader Red Sea region.²⁷ By the end of the year, President Ismail Omar Guelleh had successfully positioned Djibouti not only as a neutral hub but also as a "quiet mediator" of multilateral maritime governance.

Ethiopia's strategy for maritime access simultaneously reignited its "long-frozen" dispute with Eritrea. Between July and September, rhetoric hardened into increasingly overt military positioning. Asmara mobilized reserve forces and accused Addis Ababa of pursuing "expansionist and reckless adventurism,"²⁸ while Ethiopia warned that restraint had its limits.²⁹ Warnings of possible clashes and reported military movements around Zalambessa and Assab³⁰ revived memories of the 1998 war. Although Prime Minister Abiy Ahmed's call for international mediation in October³¹ signaled an attempt to reduce tensions, mutual distrust persisted.

Regional attention shifting toward this confrontation coincided with the resurgence of piracy. The reduction of international patrols in the southern Red Sea, redirected toward operations linked to the Houthis, created security vacuums off the Somali coast. A series of hijackings and maritime raids between October and November³² confirmed the return of organized piracy after nearly a decade of relative dormancy. In response, China and the European Union rapidly reinforced their naval deployments³³, while Somalia restructured its security cooperation with Türkiye and launched a national Blue Economy Framework in December aimed at linking maritime security with

23 "Italian High-Level Delegation Visits Massawa Port", Shabait, July 30, 2025.

24 "Djibouti, Saudi Arabia Sign 30-Year Deal for Tadjourah Port", Dawan Africa, 2025.

25 "Egypt Finalises Deal to Develop Djibouti's Port in Bid to Pressure Ethiopia over Nile Dam", The National, Dec. 31, 2025.

26 "Chinese Conglomerate to Use Djiboutian Port for Gas Exports", Dawan Africa, 2025.

27 "Djibouti Plays Host to EU-Backed Red Sea Security Talks", Dawan Africa, 2025.

28 "Eritrea Accuses Ethiopia of Reviving Expansionist and War Rhetoric", Dawan Africa, 2025; "As Ethiopia Escalates, President Isaias of Eritrea Warns of Reckless Adventurism Threatening Regional Peace", MESOB Journal, April 2, 2026.

29 "Ethiopia Accuses Eritrea of Territorial Violations, Armed Group Support; Reaffirms Assab as Strategic Priority, Warns Military Restraint Is Limited", Addis Standard, Nov. 14, 2025.

30 "The Risk of a New Ethiopian-Eritrean War is Growing", Genocide Watch, Oct. 22, 2025.

31 "Ethiopia calls for international mediation with Eritrea over sea Access", Arab News, Oct. 28, 2025.

32 "Piracy Resurges off Somali Coast as Attacks on Merchant Ships Increase", Shabelle Media, Nov. 8, 2025.

33 "EU Naval Forces Free Tanker Crew in Daring Somali Rescue", Evrim Ağacı, Nov. 8, 2025; "Attackers Target Ship off Somalia's Coast Amid Piracy Resurgence", Al Jazeera, Nov. 6, 2025; "China Navy Gulf of Aden Anti-Piracy Handover", China Global South, Nov. 6, 2025; "China Has Recovered Its Fishing Vessel from Pirate Captivity off the Coast of Somalia", Afrinz, Jan. 13, 2025.

economic development.³⁴

Across the Red Sea corridor, external actors further deepened their presence in the Horn of Africa throughout 2025. France expanded its air and naval cooperation operations conducted from Djibouti³⁵; Russia advanced naval training projects with Ethiopia³⁶; and China deployed its 48th escort fleet to the Gulf of Aden.³⁷ Egypt and Saudi Arabia coordinated limited patrols around the Bab al-Mandab Strait in an effort to prevent broader escalation linked to Houthi activities. The growing concentration of global naval deployments transformed the waters surrounding the Horn of Africa into a dense deterrence environment where great power competition, counterterrorism operations and trade security increasingly overlapped.

By the end of 2025, the region's emerging bloc formations had become more clearly defined. Egypt, Eritrea and Sudan formed an informal littoral coalition centered on sovereignty and defense, while Ethiopia focused on expanding maritime access through new bilateral agreements. Djibouti, meanwhile, converted its neutrality into a strategic

instrument of influence by balancing relations among competing actors. Within this framework, the Red Sea evolved into the strategic axis of the region, functioning simultaneously as both a connecting and dividing element between African and Middle Eastern security systems.

INTERSECTING DYNAMICS

The maritime and regional security environment of 2025 was shaped by overlapping competitions over access, influence and legitimacy. Across the Horn of Africa, maritime rivalry emerged as the most visible manifestation of deeper geopolitical contestation. Ethiopia's pursuit of a maritime power identity, Eritrea's remilitarization of coastal zones and Egypt's assertive Red Sea diplomacy converged within a broader continuum of strategic maneuvering. As a result, an increasingly militarized maritime landscape emerged in which sovereignty was projected through ports, patrols and strategic partnerships.

The growing involvement of foreign powers has further blurred the distinction between national defense and external military presence. The United States,

Across the Red Sea corridor, external actors further deepened their presence in the Horn of Africa throughout 2025. France expanded its air and naval cooperation operations conducted from Djibouti; Russia advanced naval training projects with Ethiopia; and China deployed its 48th escort fleet to the Gulf of Aden.

³⁴ "Somalia: Piracy Incidents Raise Concerns", *ALLAfrica*, Dec. 17, 2025.

³⁵ "France Deploys Modernized Mirage 2000D RMV Fighters from Djibouti to Secure Bab al-Mandeb Strait", *Army Recognition*, Aug. 25, 2025.

³⁶ "Ethiopia Builds Naval Headquarters with Russian Support Despite Having No Access to the Sea", *United24 Media*, July 10, 2025.

³⁷ "China Sends New Navy Fleet on Escort Mission in Gulf of Aden Waters Near Somalia", *Horseed Media*, Oct. 11, 2025.

Russia, and China have collectively transformed the Red Sea and the Gulf of Aden into an interconnected network of logistics hubs, training facilities, and deterrence platforms. These overlapping deployments simultaneously generated deterrence and heightened tensions, while maritime operations increasingly became instruments of strategic signaling among major powers. For regional states, partnerships once viewed primarily as opportunities for capacity-building gradually evolved into long-term dependency relationships, embedding domestic maritime policies within broader calculations of global competition.

A second defining dynamic was the growing convergence between security and commerce. Port development projects, naval force construction and energy logistics increasingly merged within an integrated geoeconomic strategy. Djibouti's rise as a regional hub, investments by Saudi Arabia and Egypt in port security and China's continued infrastructure expansion demonstrated that economic corridors had simultaneously become strategic assets. Within this framework, maritime trade evolved into an extension of diplomacy, while control over logistical nodes generated direct political leverage.

Institutional fragmentation further intensified regional geopolitical risks surrounding maritime commerce. As multilateral mechanisms such as the IGAD continued to lose effectiveness, temporary and issue-specific coalitions became increasingly prevalent. Egypt's bilateral coordination with Djibouti and Saudi Arabia, Ethiopia's pursuit of independent maritime partnerships and Eritrea's exclusionary rhetoric collectively reflected the erosion of collective maritime governance. The absence of an integrated Red Sea security framework pushed regional responses onto a competitive footing and created greater space for external actors to shape the maritime agenda.

Finally, the linkage between the Red Sea and Gulf security zones became fully operationalized in 2025. Houthi drone and missile attacks targeting Israeli and Western-linked vessels redirected maritime patrols away from the Somali coast, directly contributing to the resurgence of piracy by creating exploitable security vacuums in the region. This growing interconnection blurred the boundaries between African and Middle Eastern security systems while transforming the Horn of Africa into both an extension and a victim of militarization in the Gulf. Taken together, these intersecting dynamics point to a defining transformation in which the maritime domain of the Horn of Africa has ceased to function as a shared space and instead evolved into a contested arena where every port, every patrol and every partnership carries geopolitical significance.

KEY REGIONAL TRENDS

- **The Shift of Regional Politics toward Maritime Geopolitics**

Access to the sea has become an existential component of state strategy. Ethiopia's pursuit of maritime corridors has redefined its foreign policy orientation, while littoral states have mobilized to defend coastal sovereignty. In this process, maritime space has surpassed land borders as the principal measure of national access, influence and legitimacy.

- **Djibouti's Consolidation as a Maritime Hub**

Through diversified partnerships with Gulf, Asian and Western actors, Djibouti reaffirmed its position as the logistical and diplomatic anchor of the Red Sea. In an increasingly competitive environment, the country successfully com-

bined its geographical advantages with an effective balancing strategy. Djibouti's model of active neutrality strengthened both its internal stability and its leverage within regional politics.

- **The Reemergence of Ethiopia-Eritrea Rivalry**

Competition in the maritime sphere reignited the latent hostility between Ethiopia and Eritrea. The struggle over Assab embodied the broader confrontation between Ethiopia's search for strategic relevance and Eritrea's defense of sovereignty, sustaining the risk of conflict despite ongoing mediation efforts.

- **The Resurgence of Maritime Insecurity**

The reduction of patrol coverage and shifting security priorities created new opportunities for non-state actors, contributing to the reemergence of piracy activities. These developments exposed the erosion of maritime governance capacity and highlighted the vulnerability of regional trade networks.

- **The Expansion of External Military Footprints**

France, China, Russia, Türkiye and Gulf states expanded their military and logistical presence, increasingly integrating local security dynamics into broader global power competition. The maritime domain of the Horn of Africa evolved into a contested arena characterized by overlapping deterrence missions and strategic rivalry.

- **Geopolitical Entrenchment and Strategic Polarization**

By the end of 2025, the region had become increasingly defined by struc-













tured geopolitical competition. While Ethiopia continued its pursuit of autonomous maritime access, Egypt and Eritrea reinforced a coastal defense axis, and Djibouti positioned itself as a mediating balancing actor. This polarization made great power competition along the Red Sea corridor, particularly on the Horn of Africa side, increasingly visible.

STRATEGIC TRENDS AND THE OUTLOOK FOR 2026

Two major developments emerged as the defining strategic trends in the maritime domain during 2025. The first was the rapid pace of militarization across the maritime sphere. What began as gradual base expansions evolved within months into an overt strategic competition in which Gulf states, Egypt, Eritrea and Ethiopia all invested in dual-use infrastructure and coastal defense systems. The second development was the resilience of selective cooperation mechanisms. Despite intensifying rivalry, Djibouti succeeded in maintaining a functional channel of communication through the Red Sea Maritime Security Dialogue, while Egypt and Saudi Arabia coordinated limited patrols aimed at preventing broader escalation.

Looking ahead, the Red Sea is expected to remain the strategic axis of the Horn of Africa. Ethiopia's continued pursuit of maritime access, Eritrea's fortified coastal posture and the entrenched presence of Gulf states will shape the core parameters of the region's diplomatic and security architecture. Djibouti's mediating role will remain critical for preserving minimum levels of coordination among competing powers. Meanwhile, ongoing institutional reforms in Somalia may gradually contribute to the expansion of governance capacity along the country's coastline over time. However, unless stronger re-








Table 2: Shifting Balances in the Red Sea Security Complex: Strategic Indicators for 2025

Indicator	Early 2025	Mid-2025	Late 2025
Maritime Diplomatic Cooperation	 (Continuity and cautious optimism within the framework of the Ankara Declaration)	 (Active process with limited progress; Djibouti hosts informal maritime dialogues)	 (Gradual decline in substantive engagement)
Regional Polarization Over Red Sea Governance	 (Relative balance among littoral states)	 (Growing polarization between the Egypt-Eritrea-Sudan alignment and Ethiopia's balancing strategy in the Red Sea basin)	 (Deepening polarization)
Maritime Militarization and Strategic Signaling	 (Symbolic naval deployments)	 (Ethiopia's naval restructuring and Eritrea's coastal reinforcement)	 (Expanded deployments by Gulf states, Egypt and external actors)
Regional Stability Index	 (Stable environment supported by diplomatic engagement)	 (Piracy reemerges and tensions intensify)	 (Conflict risks persist and external naval concentration reaches its peak)

gional frameworks are established, maritime governance is likely to remain fragmented and reactive in nature.

The Horn of Africa entered 2026 facing a defining test: whether the current militarization of the seas can evolve into a structured deterrence framework or instead drift toward permanent fragmentation. The region's future stability will depend on whether existing rivalries can ultimately be transformed into mechanisms of cooperation along the Red Sea and Gulf of Aden maritime corridor – the principal fault line where regional contestation is most intensely concentrated.

Symbol Legend

-  Stable or Positive Trend
-  Fragile/Uncertain Situation
-  Increase or Escalation Trend
-  High-Level Tension or Military Intensification
-  Limited/Stagnant Progress
-  Regression/Declining Influence
-  Severe Deterioration or Crisis Situation

In conclusion, the data presented in Table 2 point to a structural transformation within the

Red Sea security complex throughout 2025, characterized by the weakening of diplomatic engagement alongside the gradual intensification of military concentration and regional polarization. Maritime diplomacy, which generated cautious optimism at the beginning of the year within the framework of the Ankara Declaration, became confined to limited progress by midyear and entered a phase of substantive decline toward the end of the year. In parallel, the relative balance among littoral states gave way to deepening polarization between the Egypt-Eritrea-Sudan axis and Ethiopia's broader balancing strategy.

During the same period, maritime militarization evolved from symbolic deployments into multidimensional power projection involving multiple actors. The growing presence of Gulf states and external naval forces further transformed the regional security architecture into a more complex and competitive environment. The combined effect of these dynamics demonstrated that regional stability had significantly deteriorated by the end of the year, amid the reemergence of piracy risks and the unprecedented concentration of foreign naval deployments.

CHAPTER III GEOPOLITICAL DYNAMICS IN THE CONTEXT OF ENERGY AND SECURITY



A view of Türkiye's Oruç Reis seismic research vessel is seen after completing its first intercontinental mission in Somalia, as it arrives at Filyos Port in Zonguldak, Türkiye, July 4, 2025.

In 2025, the Horn of Africa stood at the intersection of energy competition, geopolitical ambition and strategic realignment. Developments throughout the year reflected not only a period defined by power struggles and shifting alliances, but also a broader process in which energy became increasingly centralized as an instrument of political leverage and regional influence. Across the Red Sea and Nile basins, governments integrated infrastructure, security and diplomacy within a unified strategic framework. As a result, energy sovereignty, foreign partnerships and maritime control converged at the center of both national and regional agendas.

Ethiopia's assertive hydroelectric strategy, Somalia's emerging energy diplomacy and Djibouti's balancing approach collectively redefined the regional hierarchy, while older alignments gave way to more pragmatic networks of interest. At the same time, Er-

itrea's militarized posture, Egypt's renewed activism and the competing investments of Gulf states further deepened external involvement in regional affairs. Together, these dynamics shaped a period of growing interdependence in which cooperation and geopolitical rivalry advanced simultaneously.

ETHIOPIA'S STRATEGIC CONSOLIDATION AND REGIONAL TENSIONS

Ethiopia consolidated both its domestic and regional position through a series of symbolic and material milestones. The completion of the GERD and its inauguration in September 2025 represented both a nationalist triumph and the culmination of Addis Ababa's decade-long narrative of energy sovereignty.³⁸ However, the development also reignited tensions surrounding the Nile issue, prompting Egypt and Sudan to form a joint front condemning Ethiopia's unilateral approach.³⁹

38 "The Grand Ethiopian Renaissance Dam: Celebrating Ethiopia's Triumph of Sovereignty and Persistence", The Reporter Ethiopia, Sept. 6, 2025.

39 "Egypt, Sudan Urge Ethiopia to Abandon Unilateral Nile Actions", Egypt Today, Feb. 26, 2026.

These tensions deepened further following allegations voiced by Sudanese officials claiming that Ethiopia had allowed border areas, particularly in the Benishangul-Gumuz region, to be used for the training and deployment of the Rapid Support Forces (RSF) and affiliated elements, supported by the UAE, for operations in Sudan's Blue Nile region.

Domestically, Prime Minister Abiy Ahmed utilized the success of the GERD as a projection of stability while unveiling ambitious industrial and energy expansion plans, including the Gas-by-Rail Economic Corridor Initiative, reportedly valued at \$29 trillion in economic potential⁴⁰, as well as nuclear cooperation agreements with Russia.⁴¹ These initiatives can be interpreted as part of a broader strategy aimed at repositioning Ethiopia from a recipient of external assistance into a self-defined industrial center. At the same time, Ethiopia's simultaneous troop deployments in Somalia, framed as bilateral security arrangements outside the AU framework, heightened regional suspicions⁴² and intensified tensions with both Mogadishu and Cairo.

The most destabilizing development, however, was the renewed escalation of confrontation with Eritrea. Beginning in February, Eritrea mobilized military units, imposed travel restrictions and recalled veterans under the age of 60 to active service. Observers interpreted these measures as signaling the most serious military posture since the 1998-

2000 border war. By midyear, Ethiopia and Eritrea had entered a phase characterized by mutual accusations and tactical signaling. Asmara alleged that Ethiopia was being armed by the UAE, France, Israel and the U.S.⁴³, further intensifying tensions between the two countries. Despite diplomatic appeals and U.N. warnings issued in December, the Ethiopia-Eritrea border increasingly reemerged as a latent conflict zone.

These tensions deepened further following allegations voiced by Sudanese officials claiming that Ethiopia had allowed border areas, particularly in the Benishangul-Gumuz region, to be used for the training and deployment of the Rapid Support Forces (RSF) and affiliated elements, supported by the UAE, for operations in Sudan's Blue Nile region.⁴⁴ Although Ethiopian authorities denied these accusations, the circulation of such narratives intensified mutual distrust and reinforced perceptions that Ethiopia had become indirectly involved in the Sudan conflict.

40 "Ethiopia Signs Landmark '\$29 Trillion Gas-by-Rail' Deal to Power Africa", Ethiopian Broadcasting Corporation (EBC), Dec. 9, 2025.

41 "Meeting with Prime Minister of Ethiopia Abiy Ahmed", Kremlin, Sept. 25, 2025.

42 "Ethiopia's Troops Outside ATMIS Framework in Somalia", Borkena, June 14, 2025.

43 "Eritrean President Says Ethiopia Preparing for War with Support from Foreign Powers", Borkena, July 24, 2025.

44 "Sudan army prepares for RSF attack from Ethiopia on Blue Nile towns", Sudan Tribune, Dec. 27, 2025.

ERITREA'S HARD POWER AND ISOLATION

Eritrea's trajectory throughout 2025 clearly demonstrated its continued reliance on coercive diplomacy. Support provided to the SAF through covert arms shipments routed via Asmara reinforced Eritrea's alignment with Khartoum against the paramilitary RSF, which were widely alleged to be backed by the UAE.⁴⁵ Eritrea's withdrawal from the IGAD by the end of the year⁴⁶ formalized the country's disengagement from regional multilateralism. Meanwhile, the trilateral coordination mechanism launched in January with Egypt and Somalia provided a balancing framework against Ethiopian influence, while simultaneously deepening Eritrea's dependence on Cairo's strategic patronage.

Eritrea's rhetoric throughout the year oscillated between defiance and narratives of victimization. President Isaias Afwerki openly accused Ethiopia of preparing for war while simultaneously insisting that "there is no reason for conflict."⁴⁷ This strategic ambiguity allowed Asmara to preserve leverage without entering into full-scale confrontation. At the same time, however, it further reinforced Eritrea's reputation as the most unpredictable actor in the Horn of Africa.

SOMALIA: BALANCING FRAGILITY, FEDERAL CONTESTATION AND EXTERNAL LEVERAGE

Somalia's political trajectory throughout 2025 oscillated between tactical consolidation and structural fragility. President Hassan Sheikh

Mohamud sought to strengthen political legitimacy through domestic consolidation within the federal system, counterterrorism efforts against Al-Shabaab and expanding international partnerships. In particular, the government attempted to balance its alliances with Türkiye, Egypt and the U.S. while simultaneously managing internal divisions involving Puntland and Somaliland.

The proposal presented to the U.S. in March 2025, granting Washington exclusive access to Somali air bases and port facilities in Balidogle, Berbera and Bosaso⁴⁸, represented the clearest manifestation of this balancing strategy. While the initiative expanded U.S. influence in the region, it was also perceived as a strategic maneuver that marginalized Somaliland's autonomous aspirations and intensified broader debates surrounding sovereignty.

Simultaneously, Mogadishu deepened its relationship with Türkiye. Türkiye's reinforcement of its presence in Somalia through the deployment of an additional 500 troops and the introduction of advanced Bayraktar Akıncı unmanned aerial vehicles⁴⁹ marked a historically significant expansion of military capacity. Ankara's engagement extended beyond the defense sphere to encompass maritime training and cooperation within the blue economy framework. This process deepened further through the hydrocarbon exploration and production agreement signed with the Turkish Petroleum Corporation (TPAO), covering three offshore blocks

45 "Sudan: Advanced Chinese Weaponry Provided by UAE Identified in Breach of Arms Embargo—New Investigation", Amnesty International, May 8, 2025.

46 "Eritrea Formally Withdraws from IGAD", The Reporter Ethiopia, Dec. 13, 2025.

47 "Eritrean President Says Ethiopia Preparing for War with Support from Foreign Powers", Borkena, July 24, 2025.

48 "Somalia Offers U.S. Exclusive Control of Air Bases, Ports", Reuters, March 28, 2025.

49 "Turkey Doubles Troops in Somalia Amid Al-Shabaab Offensive", Horseed Media, April 26, 2025.

Although Somalia's state capacity showed signs of improvement throughout 2025, the security gains achieved during the year remained militarily and politically reversible in nature.

and supported by seismic surveys conducted by the Oruç Reis research vessel.⁵⁰ In parallel, an investment agreement signed with the OYAK Group aimed to develop Somalia's maritime production sector through investments in fishing infrastructure, efforts to combat illegal fishing and capacity-building initiatives targeting coastal communities.⁵¹ Taken together, this multidimensional engagement spanning security, maritime governance and resource development elevated Ankara into a cornerstone of both Somalia's external security architecture and its broader economic future.

Despite these developments, Somalia's internal cohesion continued to erode. The federal government's recognition of SSC (Sool, Sanaag and Cayn)-Khaatumo as a new federal state⁵² undermined Somaliland's claims of authority over the region and sharply intensified tensions between the separatist administration and the central government. Meanwhile, Puntland local forces'

interception of arms shipments originating from Yemen exposed the fragility of maritime governance mechanisms. By mid-year, allegations that drones and weapons supplied by the Houthis had reached militant groups in Somalia⁵³ effectively merged the conflicts of the Red Sea and the Horn of Africa into a single transnational threat ecosystem.

For Somalia, 2025 can be described as the most intensive period of militarization since 2019. Under the Trump administration, the United States conducted approximately 50 airstrikes by midyear⁵⁴, including operations carried out through the USS Harry S. Truman, marking the largest carrier-based deployment in the history of the Horn of Africa.⁵⁵ These operations targeted Daesh-Somalia networks in Puntland, which had increasingly evolved into a strategic hub for transnational financing and logistical networks.⁵⁶

Despite tactical successes, both Al-Shabaab and Daesh

50 "Türkiye Inks Offshore Oil and Gas Deal with Somalia", Hürriyet Daily News, April 10, 2025.

51 "Somalia: Piracy Incidents Raise Concerns", AllAfrica, Dec. 17, 2025.

52 "New Chapter for Somalia as Plans for New Federal State Conclude", Hiiraan Online, July 23, 2025.

53 "Houthi Rebels Are Shipping High-Tech Weapons to Somali Rebels", Commonsense, July 4, 2025.

54 "Under Trump, US Strikes on Somalia Have Doubled Since Last Year – Why?", Al Jazeera, June 24, 2025.

55 "US Supercarrier Launches Largest Carrier Strike in History", UK Defence Journal, May 23, 2025.

56 "US Navy Launches Historic Airstrike in Somalia", Deseret News, May 30, 2025.

demonstrated adaptive resilience by shifting toward more decentralized cell structures⁵⁷ and exploiting clan-based grievances.⁵⁸ The United States Africa Command's (AFRICOM) statement issued in early April warning of an emerging "Al-Shabaab-Houthi axis"⁵⁹ indicated that Western actors had formally acknowledged that militancy in the Horn of Africa had become increasingly interconnected with conflicts in the Red Sea. Although Somalia's state capacity showed signs of improvement throughout 2025, the security gains achieved during the year remained militarily and politically reversible in nature.

EGYPT'S STRATEGIC RETURN AND HORN OF AFRICA DIPLOMACY

After years of pursuing a Nile-centered diplomatic strategy, Egypt reemerged in the Horn of Africa as an active security stakeholder. Through successive engagements with Djibouti, Sudan and Somalia, Cairo developed a network of cooperation centered on Red Sea security, counterterrorism efforts and participation in the African Union Support and Stabilization Mission in Somalia (AUSSOM).⁶⁰ In August 2025, Egyptian forces completed pre-deployment training and entered the final phase of coordination with the AU.⁶¹ Although the deployment process had not been finalized by the end of the year, the initiative symbolized Egypt's transformation from a Nile Basin claimant into an active regional security actor seeking legitimacy through multilateral

engagement.

The emerging trajectory of Cairo's Horn of Africa policy has been shaped not only by a desire for cooperation but also by strategic calculations tied to its rivalry with Ethiopia. Coordination with Eritrea and Sudan functioned as a form of strategic containment aimed at limiting Ethiopia's expanding regional influence, while partnerships established with Djibouti in the fields of solar energy projects and port development⁶² served simultaneously as instruments of soft power projection and logistical support along the Red Sea corridor. Through this multidimensional approach, Egypt positioned itself as both a balancing actor and a mediator in the region by integrating energy, security and political engagement into a unified regional doctrine. By the end of the year, Cairo had increasingly linked its Nile Basin policy to a more assertive Red Sea strategy, reestablishing itself as one of the principal external actors shaping the Horn of Africa.

DJIBOUTI: THE REGION'S BALANCING ACTOR AMID INTENSIFYING MILITARIZED COMPETITION

Djibouti navigated 2025 through its characteristic strategy of cautious balancing, leveraging its strategic geography as both an economic and political instrument while managing intensifying great power competition.

57 "The US Must Sustain Counterterrorism Operations in Somalia: The Costs of Retreat Are Too High", Atlantic Council, April 17, 2025.

58 "Somalia", Security Council Report, Sept. 30, 2025.

59 "Emerging Al-Shabaab-Houthi Axis a Heightened Terrorist Threat Warns Top US General", Al Arabiya, April 3, 2025.

60 "Somalia's Stability Key to Horn of Africa Security: Egypt", Horseed Media, April 29, 2025; "President Abdel Fattah El-Sisi Meets Somali Officials", Presidency of Egypt, April 23, 2025; "Egypt and Sudan Forge Stronger Alliance on Nile Water Security Amidst Ethiopia's Defiance", Borkena, April 29, 2025; "Somalia and Egypt Eye Strategic Alliance Amid Rising Regional Uncertainty", Horseed Media, July 7, 2025.

61 "First Egyptian Troops to AU Support Mission in Somalia Complete Training", Horseed Media, Aug. 26, 2025.

62 "Egypt Signs Three Agreements with Djibouti on Ports, Logistics, and Green Energy", Ahram Online, Dec. 28, 2025; "Egypt Launches First Solar Power Plant in Djibouti", Egyptian Streets, June 19, 2025.

The renewal of the France-Djibouti defense agreement⁶³, defense cooperation accords signed with Türkiye⁶⁴ and the delivery of combat aircraft by the U.S.⁶⁵ collectively reaffirmed the country's role as a regional security cornerstone. By contrast, Russia's engagement remained largely confined to nonmilitary areas, including legal cooperation initiatives⁶⁶ and space-related projects.⁶⁷ President Ismail Omar Guelleh's public criticism of the UAE's destabilizing activities and missile threats in the Red Sea⁶⁸ simultaneously reflected both Djibouti's vulnerability and its determination to preserve strategic autonomy.

At the same time, Djibouti expanded its economic interdependence with Ethiopia by managing tensions surrounding port access through pragmatic diplomacy and multilateral projects such as Ethiopia's stake in the Ethio-Djibouti Railway linked to the Damerjog fuel facilities. The Status of Forces Agreement (SOFA) signed with Somalia⁶⁹ further reinforced Djibouti's quiet influence within broader regional stabilization efforts.

ISRAEL'S RECOGNITION OF SOMALILAND AND ITS REGIONAL IMPLICATIONS

Israel's formal recognition of Somaliland in late 2025 emerged as one of the year's most consequential geopolitical developments.⁷⁰ Framed by Tel Aviv within the broader context of Red Sea security and energy strate-

gy, the move disrupted long-standing diplomatic norms across the region. While the Somaliland administration welcomed the decision as confirmation of its de facto statehood, Somalia condemned it as an existential violation of its sovereignty.⁷¹ Accordingly, the recognition attracted attention not only as a direct challenge to Somalia's territorial integrity but also as a destabilizing development for the broader regional order.

Reactions were swift and multidimensional. The AU, the Arab League, the Gulf Cooperation Council (GCC), the Organization of Islamic Cooperation (OIC) and the EU reaffirmed Somalia's territorial integrity. Major states, including Egypt, Türkiye, China and Nigeria, also joined statements condemning the recognition.⁷² The development triggered a new phase of regional polarization: the Houthis issued threats against Israeli-linked targets⁷³, while Eritrea and Somalia called for broader international condemnation. From a strategic perspective, the recognition externalized local sovereignty disputes in the Horn of Africa, transforming them into arenas of global diplomatic contestation.

INTERSECTING DYNAMICS

The year 2025 was marked by an expanding pattern of militarized diplomacy across the Horn of Africa. Defense agreements evolved beyond instruments of security cooperation and increasingly became primary tools of po-

63 "Djibouti Approves New 20-Year Defense Treaty with France", Horn Pulse, April 16, 2025.

64 "Türkiye, Djibouti Sign Military Cooperation Agreement", Anadolu Agency, July 23, 2025.

65 "US Delivers Combat Jets to Djibouti to Boost Border Security", Dawan Africa, 2025.

66 "Putin Approves Legal Assistance Agreement with Djibouti", Afrinz, May 30, 2025.

67 "Russia and Djibouti Agree to Cooperate in Space Exploration", TV BRICS, July 3, 2025.

68 "Ismail Omar Guelleh: The Emiratis Are Deeply Destabilising for the Region", The Africa Report, May 23, 2025.

69 Somalia and Djibouti Sign Status of Forces Agreement to Strengthen Defense Cooperation", Hiiraan Online, July 31, 2025.

70 "Israel Recognises Somaliland, Somalia's Breakaway Region, as Independent State", Reuters, Dec. 26, 2025.

71 "Somalia Says Israeli Recognition of Somaliland Breaches International Law", Middle East Monitor, Dec. 28, 2025.

72 "Israel's Recognition of Somaliland Slammed Across World Capitals", Al Jazeera, Dec. 27, 2025.

73 "Any Israeli Presence in Somaliland Will Be a Target: Houthi Leader", Al Jazeera, Dec. 28, 2025.

litical influence. Türkiye's expanding presence in Somalia, Egypt's engagement through the AUSSOM and Djibouti's growing network of bilateral defense agreements demonstrated that military diplomacy had become a new geopolitical language across the region.

The deepening of proxy relationships further blurred the boundaries between domestic and regional conflicts. Eritrea's covert support for the SAF, the radar facilities and logistical operations established by the UAE in Puntland⁷⁴ and the transfer of Houthi-origin drones and weapons into Somali territory⁷⁵ collectively reflected the broader trajectory of regional polarization. These dynamics pointed to an increasingly fluid environment in which state and non-state actors competed across interconnected conflict arenas.

Fragmentation within regional institutions further intensified these structural challenges. Eritrea's withdrawal from the IGAD, combined with the proliferation of parallel security arrangements such as Ethiopia's independent military deployments in Somalia, weakened collective mechanisms originally designed for crisis management. Competing mediation initiatives and shifting alliances eroded trust and reduced multilateral coordination to a largely symbolic and ineffective level.

At the same time, the Horn of Africa became an increasingly concentrated arena of great power competition. The U.S., Türkiye, Russia, Egypt and the UAE expanded their regional presence, embedding both military and economic interests within the region's fragile security architecture. These overlapping agendas transformed the Horn of Africa into a living laboratory of multipolar competition, where influence came to be measured not

only through traditional diplomacy but also through logistical hubs and military bases. While this concentration reinforced the region's strategic importance, it also sharpened rivalries and heightened the risk that external power competition could increasingly spill over into local conflicts.

KEY REGIONAL SECURITY TRENDS

- **Militarized Diplomacy and Strategic Signaling**

The security environment of the Horn of Africa in 2025 was characterized by the deepening fusion between diplomacy and militarization. Regional governments increasingly relied on defense partnerships and security agreements to advance political objectives. Ethiopia's alleged military deployments in Somalia outside the framework of the African Union, Türkiye's expanding support through military training and security equipment, and Egypt's active role through AUSSOM reveal the evolving balance of influence competition among both regional and extra regional actors in the Horn of Africa. This form of militarized diplomacy produced a strategic landscape in which cooperation and deterrence coexisted within a tense equilibrium, reshaping traditional alignments while generating new forms of rivalry.

- **Proxy Warfare and Transnational Networks**

Proxy dynamics intensified further throughout the region. Eritrea's involvement in the Sudan conflict through arms transfers to the SAF, the UAE's covert

⁷⁴ "UAE Deployed Radar to Somalia's Puntland to Defend from Houthi Attacks, Supply Sudan's RSF", Middle East Monitor, April 27, 2025.

⁷⁵ "Houthi Rebels Are Shipping High-Tech Weapons to Somali Rebels", Commonsense, July 4, 2025.

security operations in Puntland and Port Sudan, and the flow of Houthi drones and weapons into Somalia blurred the distinction between domestic and transnational threats. These overlapping networks of influence transformed local conflicts into extensions of broader geopolitical competition, linking instability in the Red Sea with land-based insurgencies and border disputes.

- **Institutional Fragmentation and the Weakening of Multilateralism**

Regional institutions continued to fragment under mounting political and military pressures. Eritrea's withdrawal from the IGAD, competing mediation frameworks and the emergence of ad hoc security arrangements among states undermined confidence in collective mechanisms. Although the mandate of the AUSSOM expanded, coordination gaps persisted between member states and external partners. As a result, multilateral platforms retained their formal presence but increasingly lacked the authority and cohesion necessary to shape concrete developments on the ground.

- **External Influence and Strategic Competition**

The influence of external powers in the region reached unprecedented levels. The U.S., Türkiye, Russia, China and Egypt deepened their presence through military bases, defense and energy agreements, and infrastructure investments. While Djibouti continued to serve as the logistical anchor for multiple foreign militaries, Somalia and Ethiopia increasingly evolved into testing grounds for competing security models. This concentration of global actors transformed the Horn of Africa into a

focal point of strategic competition, integrating local politics into the broader dynamics of multipolar rivalry.

- **The Resilience of Non-state Threats**

Non-state actors adapted effectively to this increasingly militarized environment. Al-Shabaab and Daesh-Somalia rebuilt their operational networks by exploiting governance vacuums and shifting alliances, particularly in northern and central Somalia. Despite intensified air operations conducted by the U.S. and Türkiye, militant groups preserved both operational mobility and organizational flexibility, exposing the limitations of purely kinetic approaches pursued in the absence of comprehensive political stabilization strategies. The emerging linkage between Al-Shabaab and the Houthis in Yemen extended regional insecurity into the Red Sea area and demonstrated the growing integration between land-based and maritime threats.

Taken together, these trends reveal a security order defined by overlapping interventions, fragile forms of cooperation and an expanding external footprint. While regional states pursued deterrence through militarization, external powers competed for influence under the language of partnership. The result was a heavily armed yet weakly coordinated security landscape in which peace increasingly depended not on regional consensus, but on the temporary alignment of external actors' interests.

STRATEGIC TRENDS AND THE OUTLOOK FOR 2026

Two major developments in 2025 revealed the broader trends that fundamentally reshaped the political and security landscape of the Horn

of Africa. The first was the rapid and intense escalation of tensions between Ethiopia and Eritrea. This development brought the possibility of interstate conflict back to the forefront in a region already strained by multilayered crises. What began with border militarization and reciprocal diplomatic accusations gradually evolved into a broader narrative confrontation in which both sides portrayed themselves as victims of external interference. The scale and pace of Eritrea's mobilization, combined with Ethiopia's increasingly hardened rhetoric and new military deployments, exposed the fragility of the post-2000 normalization framework. Under conditions where domestic political dynamics intersected with regional ambitions, the events of 2025 demonstrated how quickly deterrence could erode across the Horn of Africa.

The second major development was the internationalization of sovereignty disputes following Israel's formal recognition of Somaliland toward the end of the year. This move expanded legitimacy conflicts in the Horn of Africa beyond the boundaries of the region itself, drawing Middle Eastern, African and Western actors into the dispute. The recognition not only challenged Somalia's territorial integrity, but also reframed sovereignty as a geopolitical arena in which external actors could project influence through diplomatic symbolism. Strong reactions from regional and international organizations demonstrated that multilateral norms continue to retain political relevance, while simultaneously exposing how fragile the enforcement of those norms has become within an increasingly multipolar environment.

The defining regional pattern throughout 2025 was the simultaneous progression of escalation and strategic realignment. The most visible escalation occurred along the Ethiopia-Eritrea axis, unfolding in parallel

with the expanding foreign military presence in Somalia and the adaptive resurgence of militant groups such as Daesh-Somalia and Al-Shabaab. External militarization accelerated as the U.S., Türkiye, Egypt and the UAE consolidated their positions through military bases, troop deployments and security partnerships. At the same time, Türkiye's successful mediation initiatives contributed to a limited reduction in tensions between Ethiopia and Somalia. Djibouti, meanwhile, managed to remain above regional frictions through a cautious balancing diplomacy. Other dynamics, including disputes surrounding the GERD and ongoing Gulf rivalries, persisted steadily throughout the year and continued to function as structural constants within the region's geopolitical calculations. During this period, highly publicized claims, particularly domestic political debates in the U.S. regarding GERD financing and speculative rumors surrounding port access arrangements, largely constituted peripheral noise rather than indicators of substantive policy change.

Looking toward 2026, the Horn of Africa appears to be entering a phase best described as "deterrence without trust." While regional states remain interconnected through shared vulnerabilities such as trade corridors, maritime routes and security dependencies, deepening mutual distrust continues to weaken the collective mechanisms necessary to prevent conflict. The region's security order is becoming increasingly dependent on the presence and mediation of external actors, while internal governance reforms lag behind the pace of geopolitical transformation. Unless renewed investment is made in multilateral diplomacy and confidence-building measures, the fragile equilibrium of 2025 may give way to a new phase of strategic exhaustion. In such an environment, conflicts may remain contained but

Table 3: Geopolitical Trends in the Horn of Africa Along the Energy and Security Axis, 2025

Indicator	Early 2025	Mid-2025	Late 2025
Energy Development and Infrastructure	▲	▲ (GERD completion, Somalia oil agreements)	●
Geopolitical Alignment and Competition	●	▲ (Growing polarization: the Egypt-Eritrea-Sudan alliance versus Ethiopia's expanding engagement with regional and external actors)	▲ ▲ (Structural polarization, declining IGAD cohesion)
External Power Involvement	●	▲ (Entrenchment of major powers: Russia, the U.S., Gulf states)	●
Regional Stability Index	●	●	●

Symbol Legend

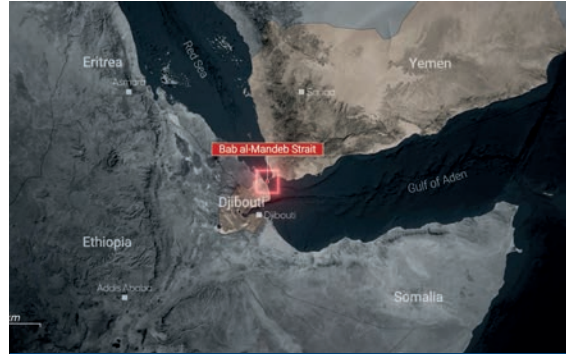
- Stable/Positive Trend
- ▲ ▲ High Tension/Critical Intensity
- Fragile/Uncertain Situation
- Limited Progress/Stagnant Process
- ▲ Increase/Escalation
- Severe Deterioration/Crisis Situation

unresolved, deterrence may persist without reconciliation and stability may increasingly rest not on the political will of regional actors, but on the inertia of external engagement.

In conclusion, the data presented in Table 3 demonstrate that the acceleration of energy projects throughout 2025 became one of the principal driving forces behind geopolitical realignment and intensifying security competition in the Horn of Africa. While the expansion of energy infrastructure during the early part of the year progressed alongside a relatively stable regional environment, developments such as the completion of the GERD and Somalia's oil agreements accelerated competition within the energy sphere by midyear. This process deep-

ened the polarization that became increasingly visible between the Egypt-Eritrea-Sudan axis and Ethiopia's expanding engagements, particularly with the UAE and France. At the same time, the establishment of more permanent security and economic footprints by major powers, including Russia, the U.S. and Gulf states, contributed to the structuralization of regional competition. Although energy projects showed signs of consolidation and relative stagnation toward the end of the year, the institutional entrenchment of geopolitical bloc formation and the weakening cohesion of the IGAD pointed to a security environment in which the regional stability index had deteriorated significantly by year's end.

CHAPTER IV REGIONAL SYNTHESIS AND STRATEGIC OUTLOOK FOR 2026



The Red Sea, the Bab al-Mandeb Strait and the Gulf of Aden remain pivotal arenas where the potential for cooperation and the risk of confrontation intersect.

By the end of 2025, the Horn of Africa had entered a period of "strategic transformation" characterized less by open conflict than by the reconfiguration of geopolitical balances. Developments throughout the year demonstrated the emergence of a hybrid regional order shaped by three intersecting dynamics: the internal erosion of state authority, the externalization of sovereignty through security and energy partnerships, and the consolidation of militarized diplomacy as the region's new norm. The interaction among these trends produced a complex landscape in which deterrence, cooperation and rivalry coexisted within a fragile equilibrium.

Ethiopia's position remained both decisive and fragile. The partial stability achieved through the Amhara peace accord and ongoing federal reforms proved insufficient to offset the structural pressures generated by multidimensional insurgencies and economic contraction. Addis Ababa's continued pursuit of maritime access and its deepening partnership with Russia strengthened its regional ambitions while simultaneously intensifying tensions with Egypt, Eritrea and

Sudan. The central question for 2026 is whether Ethiopia can simultaneously sustain its pursuit of internal stabilization and external power projection without overstressing its political and military capacity.

Somalia, meanwhile, faces a similarly complex but distinct set of challenges. Despite notable diplomatic progress and renewed economic engagement, the continued presence of Al-Shabaab and the growing influence of Daesh-Somalia expose the fragility of recent gains. The success of the federal government in 2026 will largely depend on whether the international partnerships established particularly with Türkiye, Qatar, and the United States can be translated into tangible stabilization outcomes. Somalia's new maritime and energy agreements carry transformative potential; however, unless disputes over revenue sharing and sovereignty are resolved, these initiatives could further deepen existing political fault lines.

Eritrea enters 2026 as an increasingly unpredictable actor. Its hardline posture toward Ethiopia and expanding coordination with Egypt

The Horn of Africa is more interconnected than ever before, yet trust remains largely unattainable. Although regional states are tightly linked through trade, energy and security dependencies, these connections continue to be approached through a zero-sum logic centered on leverage rather than cooperation.

and Sudan have elevated its strategic relevance while simultaneously increasing the risk of confrontation with Addis Ababa. Eritrea's withdrawal from the IGAD, combined with its selective engagement with Gulf partners, has reinforced a model of self-reliant deterrence. Nevertheless, the long-term sustainability of this approach remains uncertain. Continuing economic stagnation and intensifying international scrutiny could generate renewed pressure on Asmara to pursue diplomatic engagement, particularly if the costs associated with regional military confrontation continue to rise.

Djibouti, meanwhile, continues to retain its status as the region's indispensable actor. Its ability to manage competing interests while preserving economic stability has positioned the country at the center of both regional trade and global maritime strategy. Nevertheless, Djibouti's growing dependence on external actors and the accelerating militarization of the Red Sea will require an increasingly delicate balancing strategy in 2026. While its dual role as mediator and logistical hub provides significant leverage, further escalation in Ethiopia-Eritrea tensions or intensifying competition in the Red Sea could simultaneously expose the country to heightened regional turbulence.

Across the broader region, the Red Sea corridor will continue to

shape the trajectory of the Horn of Africa. The militarization of maritime routes, the proliferation of foreign military bases and the growing intersection between land-based and maritime conflicts have collectively produced a security continuum stretching from the Sahel to the Gulf of Aden. The reemergence of piracy, the proliferation of unmanned aerial systems and the expanding operational footprint of global powers all indicate that the Red Sea will remain one of the principal arenas of both cooperation and confrontation in the years ahead.

Energy politics are likely to intensify further in 2026. Ethiopia's transition toward the practical implementation of hydroelectric exports, Somalia's acceleration of offshore exploration activities and the deepening economic influence of Gulf states through infrastructure and renewable energy investments will all contribute to this trajectory. If managed through regional cooperation frameworks, these dynamics could generate opportunities for shared development; however, in the absence of a collective governance model, they also risk institutionalizing competition centered on access and control.

At the institutional level, the Horn of Africa faces a critical strategic choice. The erosion of the IGAD and the limited capacity of the AU have created an authority vacuum increasingly filled by transactional arrangements led by external ac-

tors. The central outlook for 2026 will therefore depend on whether African-led diplomacy can adapt to this environment by constructing modular and flexible mechanisms capable of managing complex security and economic interdependencies. Without such mechanisms, the region's security architecture is likely to remain reactive, fragmented and structurally fragile.

Within this framework, the strategic outlook for 2026 rests upon a structural paradox. The Horn of Africa is more interconnected than ever before, yet trust remains largely unattainable. Although regional states are tightly linked through trade, energy and security dependencies, these connections continue to be approached through a zero-sum logic centered on leverage rather than cooperation. The region therefore stands at a crossroads between managed interdependence and deepening fragmentation. The ultimate outcome will depend less on the emergence of new diplomatic agreements than on whether political leaderships can move beyond crisis management toward genuine regional integration.



CONCLUSION

In 2025, the Horn of Africa vividly reflected the intersection between internal fragilities and increasingly ambitious foreign policy objectives. Developments throughout the year demonstrated that state weakness no longer implies isolation; rather, it has evolved into a form of strategic vulnerability within an intensely competitive regional and global system. Conflicts across the region ceased to be merely local struggles and instead became interconnected nodes within a broader network shaped by energy competition, maritime disputes and ideological rivalries among both regional and external powers.

The internal crisis dynamics in Ethiopia illustrated the changing meaning of power in the Horn of Africa: a state simultaneously emerging as an energy exporter while regressing toward fragmented governance structures. The Amhara insurgency, renewed fragmentation in Tigray and the continued activities of the OLA demonstrated that domestic instability can coexist with external assertiveness. This paradox defined the political rhythm of the Horn of Africa throughout 2025, as gov-

ernments pursued regional ambitions while struggling to consolidate legitimacy at home.

Somalia, meanwhile, emerged as a symbol of cautious resilience despite persistent security challenges. Through expanded partnerships with Türkiye, Egypt and Gulf states, Mogadishu demonstrated a degree of diplomatic agility that enabled it to reposition itself from a passive recipient of international intervention into a sovereign actor within regional politics. Progress toward national elections and expanding maritime cooperation underscored the growing role of political institutions in shaping security outcomes, signaling a gradual yet meaningful departure from the dominance of militarized governance.

At the same time, Somalia's expanding external engagement became one of the focal points of broader regional contestation. Debates surrounding Israel's reported recognition of Somaliland as a limited maritime partner toward the end of 2025 triggered an intense wave of diplomatic reactions. Eritrea condemned the move as a violation of region-

These developments in the Horn of Africa reaffirmed the broader proposition that while external actors may support stability, sustainable peace must ultimately emerge from the region's own political frameworks.

al sovereignty, while Egypt and Saudi Arabia called for restraint in order to prevent escalation across the Red Sea. The Houthis in Yemen further internationalized what initially appeared to be a localized political development by issuing threats against any perceived Israeli presence in Somaliland. Türkiye reaffirmed its rejection of Somaliland's recognition and expanded its support for the Somali federal government through broader military training initiatives and enhanced blue economy cooperation. Collectively, these dynamics reinforced Somalia's centrality within competing regional and ideological agendas, transforming the country's internal sovereignty debate into a broader reflection of the Horn of Africa's struggle between normalization and fragmentation.

Djibouti and Eritrea represented two contrasting regional models: one institutional and integrative, the other unilateral and exclusionary. Djibouti transformed its geography into economic leverage while balancing competing partnerships and reinforcing its position as a hub of multilateral diplomacy. Eritrea, by contrast, deepened an isolationist form of pragmatism by distancing itself from collective frameworks while preserving strategic leverage through its geographic proximity to conflict zones and its alliances with Egypt and Sudan. Taken together, these two

approaches illustrated the Horn of Africa's central dilemma between integration and autonomy, and between regionalism and sovereign exceptionalism.

The growing influence of external actors, particularly Türkiye, the UAE, Russia and China, demonstrated that the geopolitical significance of the Horn of Africa has now entered a structurally entrenched global phase. The Red Sea corridor has effectively evolved into an extension of multiple strategic theaters, including the Indo-Pacific, the Mediterranean and the Gulf. As major powers expanded investments in port facilities, energy corridors and security infrastructure, the region's autonomy became increasingly dependent on its capacity to maneuver among overlapping global agendas.

In parallel, African-led mediation efforts conducted through the AU and the IGAD managed to preserve a residual degree of legitimacy despite growing institutional fatigue. The Amhara peace process and the diplomatic de-escalation between Ethiopia and Somalia demonstrated that local mechanisms remain capable of producing tangible outcomes when supported by consistent political will and constructive external engagement. These developments in the Horn of Africa reaffirmed the broader proposition that while external actors may support stability, sustainable

peace must ultimately emerge from the region's own political frameworks.

The trajectory of the Horn of Africa as it enters 2026 is neither linear nor predetermined. The coming period is likely to be defined by cautious diplomacy, selective cooperation and persistent militarization. The central importance of the Red Sea for both regional and global supply chains will continue to shape policy agendas ranging from counterterrorism to trade. At the same time, energy politics driven by hydroelectric production, offshore exploration activities and nuclear diversification are expected to generate new alignments along the Nile and Gulf corridors while sustaining strategic competition across the region.

At its core, the Horn of Africa is no longer merely a peripheral crisis zone; it has evolved into a laboratory of global geopolitics. Regional states are simultaneously testing new models based on strategic autonomy, hybrid governance and multidirectional diplomacy. Whether these experiments produce sustainable integration or chronic instability will depend on how regional actors balance security dependencies with collective responsibility.

Ultimately, the region's long-term stability will depend on recognizing interdependence not as a vulnerability, but as a strategic resource. Peace and

prosperity cannot be sustained through tactical alignments or temporary cooperation initiatives alone. What is required are institutionalized mechanisms capable of linking security with development, energy with diplomacy and sovereignty with shared governance. Transforming the Horn of Africa's strategic geography from an arena of competing interests into a foundation for collective resilience remains both the region's greatest challenge and its clearest opportunity.

As the Horn of Africa enters 2026, it stands at a crossroads between militarized coexistence and pragmatic cooperation, and between external dependency and regional ownership. The decisions made by regional leaders in the coming period will shape not only the stability of the Red Sea corridor, but also the credibility of Africa's own peace and security architecture. As has long been the case, the future of the Horn of Africa will be determined less by the absence of conflict than by its capacity to transform competition into structured cooperation and ambition into shared stability.

The future of the Horn of Africa will be determined less by the absence of conflict than by its capacity to transform competition into structured cooperation and ambition into shared stability.

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