



The Horn of Africa and the Mediterranean: Much Closer Than It Seems

by Irene Panozzo

The Horn of Africa is arguably part a broader Mediterranean-MENA-Red Sea-Gulf interconnected strategic system, shaped by shared security, economic and political dynamics. The Horn has become central to geopolitical competition across the Red Sea, driven by Gulf rivalries, shifting alliances and internal fragmentation within Horn states. In the region, external interventions intersect with local power struggles involving state and non-state actors. Reducing them to mere proxies of external actors, either within or outside the region, would however be a mistake. A deeper, more articulated and nuanced analysis of these interdependencies would be needed to avoid reinforcing instability and displacement.



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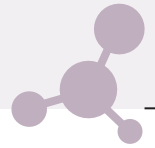
1 THE HORN OF AFRICA STRATEGIC RELEVANCE

For decades, the Horn of Africa has been seen and dealt with by European and other Western diplomacies as a region on its own, included as part of Sub-Saharan Africa in the administrative compartmentalisation of most foreign services and therefore hardly taken into consideration by officials working on the Middle East and North Africa region. In fact, for millennia geography and history have made the Horn *part of a broader neighbourhood* stretching from the southern coasts of the Mediterranean, in particular Libya and Egypt, to the Arab Peninsula and including the Levant.

The Horn of Africa’s integration into the Mediterranean-Red Sea-Indian Ocean arc is therefore far from recent. But the ongoing major, simultaneous security transitions throughout the Mediterranean region – driven by geopolitical competition, climate stress, migration pressures and evolving alliances – are reshaping and have increased the Horn’s relevance. The Horn is both affected by and affecting these transitions, being strategically located at the crossroads of the Red Sea and the Gulf of Aden and, in its larger configuration including

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Sudan, South Sudan, Uganda and Kenya,¹ bridging into the Sahel, Central Africa and the Great Lakes region. *Gulf rivalries, European re-engagement and the recalibration of US and Russian influence are converging there, transforming the Greater Horn into a critical theatre of global and regional power competition.*

2 A SINGLE STRATEGIC SYSTEM ACROSS THE RED SEA?

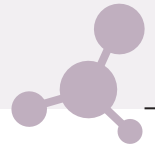
When between 2015 and 2016 the United Arab Emirates (UAE) established a presence both in Eritrea's Assab and in Somaliland's Berbera – the former directly, through a thirty-year leasing of a military base which they expanded and used for the war in Yemen; the latter via DP World, later developing a project for a civilian port – it was neither an isolated case nor an accident. In fact, the UAE, Qatar and, perhaps in a slightly more muted way, Saudi Arabia had already been turning their foreign policy attention to the Horn for years, both for economic (trade, large investments in agricultural land for food security purposes, interests in local minerals, etc.) and security reasons. The same had done Türkiye, with a particular focus on Sudan and Somalia. As some of their diplomats would privately put it, “*the Horn is our natural neighbourhood*”, *vital for their long-term economic and security agendas.*

Over the past 15 years, therefore, the Horn of Africa has emerged as a key arena for Gulf countries' strategic and economic ambitions, transforming the region into a laboratory of external rivalries and alignments. Driven by their own security concerns, trade interests and regional rivalries, these countries have sought to project influence across the Red Sea through investments, military bases and political patronage. The 2015 intervention by the Saudi-led coalition in the war in Yemen amplified the region's strategic value: as Sudan joined the coalition, ports in Eritrea, Djibouti and Somaliland became vital logistical hubs, while alliances with local elites offered entry points into fragile political systems. Gulf engagement combined hard power projection with soft power diplomacy – financing infrastructure, humanitarian aid and religious institutions – to secure both commercial access and ideological footholds in a rapidly shifting geopolitical landscape.

Yet this influx of Gulf capital and influence also deepened the Horn's internal fault lines and recalibrated its external dependencies. Competition among Gulf rivals, particularly in the years of the

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¹ From a purely geographical point of view, the Horn of Africa includes Eritrea, Ethiopia, Djibouti and Somalia. Politically, however, the label “Horn of Africa” is usually understood to include also Sudan, South Sudan, Uganda and Kenya, i.e. all the member states of the Inter-Governmental Authority on Development (IGAD), the regional organisation for the Greater Horn of Africa.



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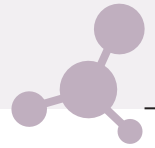
Gulf Cooperation Council (GCC) crisis between the UAE-Saudi bloc and Qatar-Türkiye, spilled into local politics, reinforcing existing divisions and sometimes destabilising fragile peace processes. Ethiopia, Sudan and Somalia found themselves navigating a delicate balancing act – courting Gulf funding and diplomatic support while trying to preserve autonomy and internal cohesion. The result was a paradoxical entanglement: *Gulf states became indispensable to the Horn's political economy, but their rivalries complicated regional integration and security cooperation.* What began as a scramble for ports and alliances has thus evolved into a broader contest over the region's strategic future, revealing the Horn of Africa as both a mirror and a microcosm of Middle Eastern geopolitics.

3 NOT JUST PROXIES

Diplomatic attempts to bring the countries of the Horn of Africa together around a shared vision – or at least an understanding of their common economic and security interests – in order to engage the Gulf states on more equal terms have repeatedly fallen short. Efforts at regional coordination were hindered not only by divergent national agendas but also by the personal rivalries and competitive ambitions and interests of the region's leaders, which often outweighed the incentives for collective action.

This fragmentation has become especially evident in recent years as *shifting political and security dynamics in Ethiopia* have impacted regional relations. Since the 1990s, Ethiopia under the Ethiopian People's Revolutionary Democratic Front (EPRDF) had positioned itself as the linchpin of the region's security architecture, a status that underpinned the Horn's limited stability. However, prime minister Abiy Ahmed's rise to power in 2018 reshaped this landscape. His domestic policies, conflicts within Ethiopia's federal structure and assertive new foreign policy have weakened both the country's capacity to act as a stabilising force and the effectiveness of IGAD, the region's primary multilateral body, on regional peace and security files.

Ethiopia's internal fragility has spilled over into its regional posture, most visibly through its *renewed insistence on direct access to the sea.* Landlocked since Eritrea's independence in 1993, Ethiopia has long depended on Djibouti for most of its maritime trade – a dependence Abiy Ahmed now frames as strategically untenable. In January 2024, Ethiopia signed a memorandum of understanding with Somaliland granting it access to the port of Berbera in exchange for potential recognition of Somaliland's statehood. This deal provoked a sharp diplomatic crisis with Somalia, which regards Somaliland as an integral part of its territory. Mogadishu condemned the agreement as an infringement on its sovereignty, rallied African Union support and



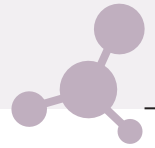
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bolstered its northern defences. Meanwhile, the tensions extended northwards: relations between Ethiopia and Eritrea, briefly mended by the 2018 peace accord, have deteriorated again amid border sensitivities, diverging regional ambitions and disagreements over the settlement of the Tigray conflict. Eritrea interpreted Ethiopia's rhetoric about "sovereign access to the Red Sea" as a not-so-veiled territorial claim, leading to mutual recriminations and heightened military readiness on both sides. *The possibility of an open conflict between Ethiopia and Eritrea thus remains real.*

Parallel to these developments, the long-standing contest between Egypt and Ethiopia over the Nile waters has intensified, reinforcing Cairo's strategic engagement across the Horn. The 15-year dispute surrounding the Grand Ethiopian Renaissance Dam (GERD) remains unresolved, with negotiations repeatedly stalling. Concerned over the dam's implications for its water security, Egypt has sought to expand its diplomatic, economic and security partnerships with upstream countries, as for example South Sudan and Uganda. Tensions between Cairo and Addis Ababa have also been fuelled by Ethiopian accusations that Egypt supported Tigrayan armed movements during the 2020-2022 conflict and has fostered renewed coordination with Eritrea.

Egypt's recent engagement in Somalia marks another dimension of this evolving rivalry. In August 2024, Cairo and Mogadishu signed a defence cooperation agreement that included substantial arms deliveries and provisions for Egyptian troop deployment under the new African Union Support and Stabilisation Mission in Somalia (AUSSOM). The move, interpreted by many as a reaction to Ethiopia's deal with Somaliland, complicated the transition from the previous AU mission (the African Union Transition Mission in Somalia, ATMIS) and raised concerns in Addis Ababa about Cairo's growing influence on its southern flank. Somalia's internal fragility has amplified the impact of these external dynamics: disputes between the federal government and regional states over power sharing and resource distribution have paralysed decision-making, while tensions over the 2026 elections risk reigniting the political crises of earlier years. *Al-Shabaab*, Somalia's Islamist insurgency which has sworn allegiance to al-Qaeda, has exploited these divisions, regaining ground during the peacekeeping transition and threatening routes to the capital, while Puntland's limited success against the *Islamic State* in the north has done little to offset the broader security deterioration.

Taken together, these intertwined domestic and regional political and security dynamics illustrate the Horn of Africa's deepening volatility. The result is a *Horn increasingly shaped by competitive leaderships and fragile, often tactical only, alliances at all levels*: intra-state, including both state and non-state actors; among neighbours in the Horn; and with countries across the Red Sea and in North Africa, as well as further afield.



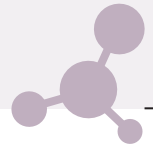
4 THE SUDAN CASE

This is all the more true in Sudan, where the interconnections between the Middle East, North Africa, the Gulf and the role of other external actors, the US and Russia included, have been more visible than elsewhere. Given its geographical position, its history and its social and religious fabric, Sudan has always had very close relations and interconnections not only with the rest of the Horn of Africa but also with North Africa, the eastern part of the Sahel, the Gulf countries and the Levant. Omar al-Bashir's Sudan took part in the Yemen war, sending both Sudan Armed Forces (SAF) and Rapid Support Forces (RSF) contingents and strengthening its relations with Saudi Arabia and the UAE, while at the same time distancing itself from Qatar during the GCC crisis and breaking relations with Iran at Riyadh's request. During President Trump's first term, Khartoum's transitional institutions also signed the Abraham Accords, in exchange for being put off the list of state sponsors of terrorism.

Since the current war started in April 2023 the cards of Sudan's warring parties' regional and international relations have shuffled. The *United Arab Emirates and Egypt* have emerged as the main opposing players, each backing a different side in the conflict, while *Saudi Arabia* has aligned more discreetly with Cairo and the Port Sudan-based de facto authorities. The UAE's involvement, which Abu Dhabi continues to deny, appears to be the most assertive and complex: it has reportedly established a sophisticated logistics network to support the RSF, using territory controlled by *Khalifa Haftar* in eastern Libya and the port of Bosaso in Somalia's Puntland as the main logistic hubs and taking advantage of their leadership's close ties with Ethiopia's prime minister Abiy Ahmed, Kenya's president William Ruto, key figures in South Sudan's government and Chad's leader Mahamat Idriss Déby. These relationships serve not only political and security aims but also the UAE's ambition to secure resilient commercial and supply routes across the Horn of Africa and the Sahel, embedding its economic footprint within a web of regional dependencies.

Egypt's posture, by contrast, has been shaped by security and strategic imperatives rooted in its long-standing support for the SAF. Cairo views the RSF's rise – and by extension, Abu Dhabi's empowerment of it – as a direct threat to its southern flank and to the balance of power along the Nile Valley. Saudi Arabia has broadly aligned with Egypt's position but with less visible assertiveness, preferring to act as a broker and preserve its own channels with the Gulf's other partners. Meanwhile, *Türkiye, Qatar and Iran* have reasserted their presence on the side of the Port Sudan authorities, reviving ties with Islamist-leaning factions that date back to Bashir's era. Their involvement has grown since the conflict's outbreak, both as a counterweight to Emirati influence and as a means to reclaim

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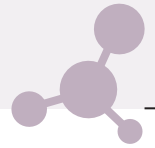
political space lost during the years of the democratic transition, when Sudan's Islamic Movement and the former National Congress Party were kept at the margins of power.

The shifting regional context has further complicated matters: Israeli prime minister Benjamin Netanyahu's 2024 address to the UN General Assembly – which included Sudan among Israel's "friends" – now appears increasingly out of sync with realities on the ground, as Iran regains leverage through both political and covert channels. If after the signing of the Abraham Accords both sides of Sudan's security architecture, leading the country together both before and after the military coup of October 2021, enjoyed very good relations with Tel Aviv, new realities and realignments both in the Middle East and in Sudan seem to indicate that at the moment the Israeli government might be closer to the RSF. Fears in mid-late 2025 that Israel might strike along Sudan's Red Sea coast, in areas controlled by SAF, were dismissed by some as unrealistic. But until less than a decade ago it was not uncommon for it to happen, as the Bashir-Islamists-Tehran connection used eastern Sudan territory as a corridor to smuggle support to Hamas in Gaza. And given Iran's military cooperation with the Port Sudan authorities, a Houthi future presence along that coast could not be ruled out. At the same time, none of these alliances is set in stone, all relations remain in flux and may continue to change, in a sort of pendulum swing, depending on dynamics both in Sudan and in or between other countries of the region.

External actors have layered additional complexity onto this volatile picture

External actors have layered additional complexity onto this volatile picture. The *United States* initially coordinated closely with Saudi Arabia in the diplomatic response to the conflict, but their Jeddah-based process failed to deliver a cessation of hostilities. Since mid-2025 Washington has relaunched its diplomatic engagement, this time through a "Quad" format including the more relevant supporters of both warring sides – Egypt, the UAE and Saudi Arabia – and explicitly taking aim, in the group's September 2025 statement, at the role of Islamist elements in Port Sudan. By the end of 2025, however, no tangible result has been reached: hostilities on the ground continue unabated and, irrespective of the RSF's lip service commitment to a humanitarian truce, neither side seems ready to sit around a table for proper negotiations.

Russia, for its part, has moved from relying on Wagner, which used Sudan primarily as a logistical base for its operations in the Central African Republic and beyond, to a more direct state-led presence. Moscow's lingering interest in establishing a naval base on the Red Sea remains a sensitive point, opposed by both Cairo and Riyadh, who see it as a destabilising intrusion into their maritime sphere.



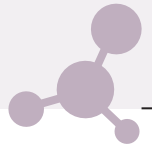
5 THE MIGRATION MYOPIA AND IMPLICATIONS FOR EUROPE

European engagement with the Horn of Africa and its wider neighbourhood has been dominated by a narrow preoccupation with migration containment. Policies designed to externalise border management to fragile or authoritarian partners in the Horn, Sudan, Libya and Tunisia treat these states as mere *migration buffers*, ignoring their internal fragilities and the Gulf patronage networks that shape their governance and economies. This approach rests on the illusion that policing transit routes can substitute for addressing the deeper drivers of displacement. Yet the majority of those fleeing conflict never reach Europe: they remain internally displaced or seek refuge in neighbouring countries, lacking the means to undertake perilous journeys across the Sahara and the Mediterranean. And *the numbers are horrendous*: in Sudan alone, since the beginning of the conflict in April 2023 the internally displaced persons (IDPs) have been 7.2 million, many of whom displaced multiple times, and the refugees 4.1 million. According to UNHCR data, as of mid-2025, the broader region (including the Democratic Republic of Congo too) hosted around 27 million IDPs, refugees and asylum-seekers.

Those who do reach Europe are often escaping suffocating political, social and economic environments rather than active war zones – a symptom of systemic governance failure and blocked aspirations. By privileging short-term stability and containment, European countries have often ended up *reinforcing the very dynamics that fuel migration and fragility*. The subcontracting of border control to local strongmen and security elites has blurred the lines between state authority and illicit networks profiting from human smuggling. Beneath the façade of stability, such arrangements entrench authoritarian governance, concentrate power and wealth and hollow out state institutions. When these regimes eventually unravel, the result is renewed instability, institutional collapse and larger migratory pressures. This cycle reveals the limits of European countries' migration myopia: policies meant to stem movement northward frequently deepen the governance and security crises that sustain it.

Protracted conflict across the Horn risks generating even more new displacement and trafficking routes that could extend through the Sahel and North Africa into the Mediterranean. The growing involvement of non-state armed actors and foreign mercenary groups compounds instability across this vast corridor. These dynamics make it increasingly difficult for European governments to rely on local security partnerships or border management arrangements and underscore the strategic necessity of viewing *the Horn not as a peripheral crisis zone but as part of Europe's extended southern neighbourhood*.

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Europe's capacity to operate effectively remains constrained by governance collapse and chronic insecurity across the Sahel-Horn belt

The expanding Gulf presence in the region further intertwines the Horn's fate with Mediterranean and European security. The geopolitical corridor stretching from the Suez Canal to the Somali coast is now one of the most militarised maritime spaces in the world. The *Red Sea and the Gulf of Aden* remain indispensable arteries for European trade and energy imports, yet both have been periodically disrupted by Houthi attacks, piracy or great-power competition. The EU has extended its maritime missions into the Red Sea and western Indian Ocean, implicitly recognising that the stability of the Horn of Africa is essential to safeguarding European maritime interests and freedom of navigation.

Finally, Europe's energy diversification and connectivity agendas tie it more closely than ever to the Red Sea and Horn logistics corridors. Competing infrastructure and trade initiatives – the EU's Global Gateway, the India-Middle East-Europe Corridor (IMEC) and China's Belt and Road Initiative – converge in this region, creating both opportunities for engagement and arenas of geopolitical friction. Yet Europe's capacity to operate effectively remains constrained by governance collapse and chronic insecurity across the Sahel-Horn belt, where many states lack full territorial control and/or monopoly over force. The challenge for the European countries and the EU, therefore, is twofold: to sustain strategic presence and investment in critical maritime and trade routes while developing pragmatic tools grounded in deeper, more nuanced, and multi-layered analysis of the many dynamics at play in these countries and across the region, in order to engage with fragmented political orders and hybrid actors that dominate local realities.

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