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The Horn in July: Contestations, Fault Lines & Strategic Complexities

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Addis Ababa, Ethiopia

<https://hornreview.org/>

+251116393227

info@hornreview.org



@HornReview

Foreword

“The Greater Horn” Monthly Brief offers a monthly synthesis of key diplomatic and security trends in one of the world’s most volatile yet consequential geopolitical theatres. This inaugural edition, covering developments from July 2025, draws on open-source intelligence, strategic assessments, policy briefings, and regional commentary to deliver nuanced, non-partisan, and research-driven insights into strategic complexities, internal vulnerabilities, emerging partnerships, and geopolitical recalibrations shaping the region’s trajectory. Intended to inform regional policymakers, analysts, and stakeholders, the briefing is produced by independent experts committed to regional stability, cooperative security, and evidence-based policymaking.

Blen Mamo Diriba
Executive Director & Editor-in-Chief
Horn Review

Table of Contents

Executive Summary.....	1
Section One: Domestic Fragility & Regional Linkages	2
1.1 Ethiopia: Political Consolidation Amid Strategic Uncertainty	2
<i>GERD Milestone and Nile Hydro politics</i>	2
<i>Terror Threat: Emergence of Islamic State Networks</i>	2
<i>Ethno-Political Tensions and Governance Risks</i>	2
1.2 Eritrea: Isolation, Denial, and Proxy Proximity.....	4
1.3 Djibouti: Strategic Posturing and Multilateral Anchoring	5
1.4 Somalia and Somaliland: Territorial Fragility and Multipolar Intrusion	5
1.5 Sudan: Dual Governance Crisis and Mediation Struggles	6
1.6 South Sudan: Peace Collapses and Cross-Border Turmoil	6
1.7 Kenya: Protest Politics and Regional Diplomacy in Parallel	7
1.8 Yemen: A Trans-Red Sea Security Spillover	7
Section Two: MENA, Gulf and Global Actor Engagement	8
2.1 Egypt: Legalism and Strategic Ambiguity	8
2.2 Gulf States' Strategic Posturing in the Horn	9
Section Three: Red Sea Naval Competition & Emerging Alignments.....	11
Conclusion: Strategic Reframing of the Horn – July 2025.....	14

The Horn in July: Contestations, Fault Lines & Strategic Complexities

Executive Summary

July 2025 was marked by intersecting geopolitical developments across the Horn of Africa, reflecting deepening complexity in regional diplomacy, security, and governance:

- Ethiopia formally completed the Grand Ethiopian Renaissance Dam (GERD), enhancing its hydro political leverage but intensifying tensions - particularly with Egypt, which escalated its diplomatic opposition and regional lobbying.
- Diplomatic activism surged, with Ethiopia strengthening ties with Gulf states, BRICS members, and African partners, while launching a climate diplomacy campaign that included the symbolic planting of 700 million trees in a single day - as claimed by the government.
- ISIS-linked arrests inside Ethiopia indicated a geographic expansion of extremist networks, potentially altering the internal and regional security calculus.
- Eritrea re-entered the spotlight, as Addis Ababa accused Asmara, the TPLF, and unnamed external actors of proxy destabilization - allegations met with sharp denials and counter-narratives from Eritrean officials.
- Opposition activity in Eritrea's Afar region intensified, with RSADO and the Eritrean National Council (EANC) amplifying anti-regime messaging - suggesting possible signs of internal fragility.
- Djibouti deepened its role as a regional security hub, securing new military agreements, expanded EU funding, and increased engagement from the U.S. and Türkiye.
- Tensions escalated between Somalia and Somaliland, driven by assertive diplomacy from Hargeisa and contested external alignments involving Taiwan, Qatar, China, and the United States. Simultaneously, political fragmentation within Somalia raised risks of renewed internal destabilization.
- Sudan and South Sudan experienced deepening state fragility. In Sudan, RSF-aligned authorities consolidated territorial control amid the collapse of peace dialogue and cross-border violence. South Sudan's fragile peace framework edged toward collapse as violence re-emerged.
- Kenya witnessed mass youth-led protests, sparked by fiscal policy and colliding with a UK trade agreement - exposing friction between domestic accountability and international economic commitments.
- Egypt pursued a calculated regional strategy, opposing GERD-related developments, aligning with Sudan's national army and Eritrea, and reportedly working to delay African Union peacekeeping deployments.

- Red Sea maritime security tightened, with rising Houthi activity, indirect Israeli naval deployments, and increasing contestation involving Gulf, Western, and regional powers - highlighting the Horn's exposure to broader geopolitical fault lines.

These developments signal heightened risks of conflict escalation, shifting alliances, and regional instability, emphasizing the need for coordinated diplomatic engagement, enhanced security cooperation, and inclusive socio-political strategies.

Section One: Domestic Fragility & Regional Linkages

1.1 Ethiopia: Political Consolidation Amid Strategic Uncertainty

GERD Milestone and Nile Hydro politics

On July 21, Ethiopia formally announced the completion of the Grand Ethiopian Renaissance Dam (GERD) - a pivotal national infrastructure achievement and symbol of sovereign resilience. The government framed the milestone within a narrative of regional energy integration and climate adaptation, emphasizing GERD's contribution to a pan-African energy transition.

Reactions from downstream states were swift. Egypt reiterated its demand for a legally binding agreement on dam operations and transboundary water flows, characterizing GERD as an existential threat to its water security. Sudan, amid domestic paralysis, issued only muted responses. The absence of a trilateral accord - despite AU-facilitated talks - has prolonged a fragile diplomatic impasse.

Addis Ababa views external pressures as an infringement on national sovereignty. With Cairo engaging in informal coalition-building among Nile Basin states and reportedly obstructing AU troop deployments in Sudan, the likelihood of legal or diplomatic escalation at international forums remains high.

Terror Threat: Emergence of Islamic State Networks

On July 15, Ethiopia's Federal Police arrested 82 suspected ISIS operatives in coordinated raids across 14 cities, including Addis Ababa, Bahir Dar, and Dire Dawa. This marks the first public acknowledgment of active Islamic State-linked networks within Ethiopia's borders.

Classified details suggest operational links to Yemen and Sudan, including financial transfers traced through informal networks. The arrests point to a geographic and operational expansion of extremist ambitions into Ethiopia, previously considered insulated from transnational jihadist infiltration. The development elevates the threat landscape, demanding a recalibrated internal security posture.

Ethno-Political Tensions and Governance Risks

Administrative restructuring in Southern Tigray triggered strong opposition from local civil society actors, including ACSOT and the Covenant for National Salvation, who accused the federal government of bypassing local consultation mechanisms. The backlash reveals persistent trust deficits in the federal compact, even in ostensibly post-conflict zones.

Simultaneously, low-intensity militia clashes continued in Metekel (Benishangul-Gumuz) and West

Oromia, particularly around Gimbi and Dembi Dollo - highlighting the fragility of federal authority in contested peripheries.

Against this backdrop, the National Dialogue Commission has launched dialogues across much of the country - including conflict-affected regions - with the exception of Tigray, where participation remains pending due to the absence of formal agreement from the TPLF.

The TPLF has demonstrated limited political will to engage constructively with the federal process. In July, it unilaterally reopened border crossings with Eritrea without federal authorization and reportedly pursued unofficial relations with Ethiopia's strategic adversaries, exacerbating internal tensions. Simultaneously, military mobilization continues, despite growing public and intellectual opposition within Tigray to a return to war.

TPLF factionalism has deepened. The Getachew Reda-led faction has gained traction among educated, non-Adwa Tigrayans, indicating a potential internal realignment. However, Getachew's dual position - within the federal cabinet - has raised suspicions about the faction's true political autonomy, blurring the line between federal inclusion and co-optation.

In Oromia, the security situation improved moderately in July, with better freedom of movement and reduced violence in key areas. Negotiations with armed factions remain ongoing.

In Amhara, the Fano movement continued its descent into tribalized fragmentation, with factions from Gondar, Shoa, and Wollo signaling willingness to negotiate with the federal government. Conversely, reports of covert links between certain Fano elements, the TPLF, and Eritrea have caused internal ruptures, as many supporters view such alignments as a betrayal not just of the Abiy administration, but of Ethiopian statehood itself.

In contrast, the Southern regions remained politically stable throughout July, with no significant unrest - serving as a comparative anchor of institutional continuity amid escalating fragmentation elsewhere.

Diplomatic Outreach & Strategic Signaling:

Ethiopia actively pursued multi-vector diplomacy, seeking to elevate its regional and global stature through engagement in prominent international forums. At the 17th BRICS Summit in Brazil, Prime Minister Abiy Ahmed articulated a strong multipolar vision, calling for structural reforms in global governance. He criticized what he described as "proxy destabilization" and "coercive informal diplomacy," implicitly addressing regional interference. Ethiopia advanced bilateral cooperation on cybersecurity with China and deepened discussions with Brazil and Gulf partners on energy, maritime security, and port logistics, signaling a strategic push to diversify partnerships beyond traditional Western frameworks.

Hosting the UN Food Systems Summit in Addis Ababa, Ethiopia framed food insecurity as a critical "driver of instability," emphasizing the nexus between climate change, economic resilience, and peace. Prime Minister Abiy's engagements with Somalia's Hassan Sheikh Mohamud and Kenya's William Ruto focused on strengthening joint border security, counterterrorism collaboration, and sustainable agricultural practices. This approach underlined Ethiopia's preference for multipolar platforms and

regionally led cooperation mechanisms, contrasting with Egypt's inclination toward formal Western or Arab-led institutions.

1.2 Eritrea: Isolation, Denial, and Proxy Proximity

Eritrea remained a latent but increasingly consequential actor in regional instability throughout July 2025. Ethiopian authorities formally accused Asmara of facilitating cross-border destabilization by supporting armed groups operating in western Tigray, eastern Sudan, and parts of Amhara, including indirect coordination with TPLF-linked factions and Sudanese-based militants.¹¹ Simultaneously, the Rapid Support Forces (RSF) in Sudan accused Eritrea of proxy interference and launched attacks on Eritrean-held territories, escalating tensions beyond Ethiopia's borders. While Asmara issued blanket denials, these allegations reflect Eritrea's continued strategy of proxy engagement to influence regional dynamics without direct confrontation. Adding to this, President Isaias accused the United Arab Emirates (UAE) of orchestrating Ethiopia's push for port access through Eritrean territory, particularly the Port of Assab, framing the UAE's ambitions as attempts to build a regional network of ports detrimental to Eritrea's interests.

Throughout July 2025, longstanding tensions between Eritrea and Djibouti persisted, underscored by unresolved border disputes and mutual distrust. While no major incidents were publicly reported during the month, the strained bilateral relationship continued to complicate regional dynamics. In a recent interview with French media, a few weeks prior to July, Djibouti's President Omar Guelleh described Eritrean President Isaias Afwerki as "hard to work with," underscoring personal and political difficulties that hamper efforts at dialogue and cooperation. This ongoing friction adds another layer of complexity to the Horn of Africa's volatile geopolitical landscape.

Meanwhile, Eritrea intensified its diplomatic engagement with Gulf and European powers, while simultaneously deepening ties with Egypt, particularly around shared concerns regarding the GERD. These maneuvers appear aimed at building alliances to counterbalance Ethiopia's expanding regional influence and diplomatic outreach. President Isaias Afwerki's recent interview reflected mounting internal frustration, widely interpreted as an attempt to externalize domestic grievances by provoking conflict with Ethiopia.

Domestically, Eritrea's authoritarian regime remains firmly entrenched, characterized by harsh repression, compulsory military conscription, and political suppression. These conditions continue to drive significant refugee flows into Ethiopia, increasing the presence of Eritrean migrants - often unregistered - and presenting both humanitarian and strategic challenges for Addis Ababa.

Tensions between Asmara and the Afar population have also heightened. Reports indicate that Eritrean authorities attempted to divide the Afar community in Ethiopia by escorting a factional Afar leader into Eritrea - an act perceived as a deliberate effort to foment ethnic divisions and undermine federal cohesion in this sensitive border region.

Meanwhile, Eritrean opposition groups have gained momentum. In July, the Red Sea Afar Democratic Organization (RSADO) held a public event in Semera, and the Eritrean National Congress (EANC) opened an office in Afar, declaring active resistance against the Eritrean regime. This growing, more

organized opposition operates primarily from exile in Ethiopia but also engages with the Eritrean diaspora and local political representatives in foreign host countries, signaling a rising challenge to Asmara's totalitarian hold.

1.3 Djibouti: Strategic Posturing and Multilateral Anchoring

Djibouti deepened its strategic profile in July 2025 through a succession of high-level defense and diplomatic engagements, reinforcing its position as a pivotal security and logistics hub in the Horn of Africa.

The European Union allocated €10 million under its European Peace Facility to enhance Djibouti's coastal surveillance and port infrastructure, reflecting growing European interest in Red Sea maritime security. Concurrently, a bilateral military cooperation agreement with Türkiye, signed during IDEF 2025 in Istanbul, opened avenues for joint military training, logistics collaboration, and defense technology exchange.

Meanwhile, U.S. senators visiting Djibouti reaffirmed support for its multilateral posture and encouraged deeper integration into regional coordination mechanisms - particularly in light of rising Red Sea tensions and proxy entanglements in neighboring states.

Djibouti also strengthened bilateral security ties with key neighbors in July:

- On July 30, Djibouti and Somalia signed a formal troop deployment agreement, enabling further Djiboutian Armed Forces presence in Somalia to support stabilization and counter-insurgency operations against al-Shabab. The agreement outlines clear operational frameworks and mutual responsibilities, underscoring Djibouti's renewed commitment to regional security leadership.
- Earlier in the month, Ethiopia and Djibouti convened their 11th Joint Defense Experts Committee Meeting in Addis Ababa. The dialogue focused on enhancing military coordination, intelligence-sharing, and border surveillance, with both parties emphasizing shared responsibility for regional peace. Though no new pact was formalized, the meeting consolidated their longstanding security partnership and affirmed mutual strategic trust.

These engagements - across European, Gulf, and regional axes - demonstrate Djibouti's careful navigation of great-power competition while preserving operational relationships with China, the U.S., Türkiye, and regional allies. Its strategic balancing act allows it to serve as a key platform for Red Sea stability, counterterrorism cooperation, and maritime intelligence-sharing frameworks.

1.4 Somalia and Somaliland: Territorial Fragility and Multipolar Intrusion

Somalia's security landscape remained deeply fragile in July, with persistent Al-Shabaab offensives underscoring the federal government's tenuous control. The group executed a sophisticated attack on a military academy in Mogadishu, inflicting significant casualties and undermining state authority, while simultaneously consolidating territorial gains by capturing Moqokori town in the volatile Hiraan region. In Jubaland, tensions between federal forces and regional security units escalated into armed clashes in Balad-Hawo, exposing fissures within Somalia's federal framework and complicating efforts toward

national cohesion.

Meanwhile, Somaliland advanced its assertive diplomatic strategy amid these internal fractures. President Abdirahman Irro's offer of naval access to U.S. observers represents a strategic move to deepen security partnerships, while a commercial fisheries agreement with Taiwan signals growing economic diversification and a challenge to Beijing's regional influence. China's explicit condemnation of these moves highlights the intensifying geopolitical contest over Somaliland's contested status. Qatar's expansion of economic ties with both Mogadishu and Hargeisa further illustrates the multipolar nature of engagement in Somalia and Somaliland, complicating the sovereignty discourse.

The declaration of a new clan-based proto-state in Somaliland's eastern Sool region by factions aligned with Mogadishu added another dimension to the already complex territorial disputes, fueling fears of further fragmentation. This development signals not only local power struggles but also the broader contest between federal and regional authorities over governance and legitimacy in the Horn's unsettled political landscape.

1.5 Sudan: Dual Governance Crisis and Mediation Struggles

In July 2025, the Rapid Support Forces (RSF) announced a rival governing council led by Prime Minister al-Taishi and Hemetti as chair, a move utterly rejected by Sudan's formal government, which labeled this entity a "phantom government" and called for its non-recognition by the international community. The Third Front "Tamazuj" initially aligned with the RSF-backed structure but later withdrew from rival civilian alliances, reflecting shifting loyalties.

Efforts by the "Sudan Quartet" to mediate the ongoing crisis failed to gain traction amid deep mistrust among stakeholders. General Abdel Fattah al-Burhan's return to Khartoum on July 29 was intended to signal normalization and unify fractured power structures but fell short of achieving significant progress.

Sudan's official government also vehemently rejected European Union sanctions equating the national army with paramilitary groups and opposed the participation of the United Arab Emirates in peace negotiations, citing the UAE's close ties with the RSF. Diplomatically, Sudan aligned with French President Emmanuel Macron's stance on Palestinian statehood, broadening its ideological and geopolitical alignments amid the crisis.

1.6 South Sudan: Peace Collapses and Cross-Border Turmoil

In South Sudan, the Sudan People's Liberation Movement-In Opposition (SPLM-IO) outright refused to engage in dialogue, citing repression and the house arrest of opposition leader Riek Machar. These developments heightened United Nations concerns over the potential collapse of the 2018 peace process.

Tensions along the South Sudan-Uganda border escalated following a reported incident in Kajo-Keji, where Ugandan forces killed nine South Sudanese soldiers, triggering mass displacement and renewed calls for clearer border demarcation to prevent further violence.

Meanwhile, the United States refused to lift sanctions on South Sudan, despite pressure to do so, linking relief to the Juba government's agreement to prosecute opposition leaders and commitments on deportee

agreements - conditions reflecting ongoing governance and human rights concerns.

1.7 Kenya: Protest Politics and Regional Diplomacy in Parallel

Kenya's political landscape remained deeply polarized through July 2025, shaped by sustained Gen Z-led protests over police brutality, youth marginalization, and governance failure. The demonstrations - ongoing since mid-2024 - have resulted in over 60 civilian deaths and widespread injuries. Civil society groups and international observers sharply criticized the government's heavy-handed response, including arbitrary arrests and the use of lethal force, further straining public trust. Calls for justice, transparency, and a reformed police service remained central rallying points for demonstrators.

In parallel, Kenya pursued a vigorous economic diplomacy agenda. A major bilateral agreement with the United Kingdom was finalized in July, aiming to double trade volumes to £2 billion. The deal includes UK investments of £100 million in Kenya's tech startup ecosystem and £200 million in renewable energy projects, along with expanded aviation links and enhanced security cooperation. This agreement reflects Nairobi's ambition to position itself as a regional innovation and sustainability hub despite growing domestic instability.

Kenya also deepened ties with its regional neighbours through high-level diplomatic engagements. On July 28, President William Ruto met with Ethiopian Prime Minister Abiy Ahmed in Addis Ababa ahead of the UN Food Systems Summit. The meeting reaffirmed mutual commitment under the 2012 Special Status Agreement, with focus areas including cross-border infrastructure, trade logistics, and regional peacebuilding.

On July 30, Kenya hosted Ugandan President Yoweri Museveni in Nairobi. The two countries signed eight Memoranda of Understanding (MoUs) covering sectors such as agriculture, fisheries, logistics, and mining. This marked a renewal of strategic alignment amid broader East African integration efforts. However, Kenya also lodged a formal complaint with the EAC Secretariat in response to Tanzania's new licensing rules, seen as discriminatory against non-citizen traders - underscoring Nairobi's simultaneous commitment to economic openness and regional rule-based order.

Together, these developments illustrate Kenya's dual trajectory: navigating a volatile domestic scene marked by youth-driven unrest while expanding its role as a pivotal economic and diplomatic actor in the Horn and East Africa. Whether this balancing act proves sustainable will depend on the government's ability to respond credibly to internal dissent without compromising external credibility.

1.8 Yemen: A Trans-Red Sea Security Spillover

While not typically foregrounded in Horn analyses, developments in Yemen became strategically central throughout July 2025, with far-reaching implications for Red Sea security and regional alignment.

Iran-aligned Houthi forces escalated drone and missile attacks on international shipping lanes in the Red Sea. On July 6, the *Magic Seas*, a Liberian-flagged bulk carrier, was struck by Houthi sea drones and rockets near Hodeidah and eventually sank. The next day, the *Eternity C*, operated by a Greek company, was attacked, resulting in the deaths of four crew members, injuries to others, and the abduction of at least

ten. The Houthis claimed both ships were connected to Israeli ports and declared a new escalation phase targeting any vessels linked to Israel - irrespective of flag. These actions severely disrupted maritime flows and increased global war-risk premiums, with carriers like Maersk continuing to divert routes away from the Suez.

The attacks triggered widespread condemnation. The UN Security Council extended the mandate for Red Sea monitoring through January 2026, despite abstentions by Russia, China, and Algeria. The EU and UN Secretary-General both issued strong statements citing violations of international maritime law and threats to civilian life and environmental safety. Regional states, including Djibouti and Kenya, raised maritime alerts and intensified naval coordination with global partners to preempt escalation along their own coastlines.

Simultaneously, reports of episodic communication between Somali extremist networks and Yemeni militant factions - particularly al-Shabaab and the Houthis - surfaced, especially around smuggling corridors near Socotra and coastal Puntland. While unconfirmed in July, previous UN findings support the possibility of cross-Red Sea arms transfers and technical support, highlighting a dangerous trend of transnational proxy convergence.

Israel responded to the escalation with airstrikes on Hodeidah port on July 21, targeting Houthi-controlled infrastructure allegedly facilitating arms transfers from Iran. Its increased naval presence around Bab el-Mandeb, paired with joint Gulf surveillance initiatives, signaled a broader regional militarization of the Red Sea corridor.

Together, these developments reveal Yemen's growing entanglement in Horn geopolitics - not merely as a neighboring conflict zone, but as a fulcrum of maritime security, proxy entrenchment, and diplomatic realignment across both shores of the Red Sea.

Section Two: MENA, Gulf and Global Actor Engagement

2.1 Egypt: Legalism and Strategic Ambiguity

In July 2025, Egypt intensified its legal and diplomatic efforts concerning the Grand Ethiopian Renaissance Dam (GERD), seeking to establish a binding legal framework to regulate dam operations and water flow. This approach saw Cairo engaging in informal lobbying at the United Nations and African Union, attempting to leverage international institutions to advance its position. Despite these efforts, Egypt maintained a cautious and ambiguous stance in the broader Horn of Africa security landscape.

Ethiopian Prime Minister Abiy Ahmed extended an official invitation to Egyptian President Abdel Fattah el-Sisi to attend the GERD's inauguration ceremony. However, Cairo declined to participate, citing unresolved concerns over water rights and the lack of a binding agreement on dam operations. This refusal underscored persistent diplomatic strains between the two countries.

Egypt deepened intelligence-sharing and military cooperation with Somalia, aiming to secure a foothold in the region's evolving security architecture. However, Cairo's involvement remained circumspect amid growing regional tensions, especially given Ethiopia's expanding footprint.

Egypt sustained and subtly intensified its strategic partnership with Eritrea, focusing on intelligence exchanges and regional security cooperation to counter Ethiopia's rising regional influence. This relationship forms a crucial pillar of Cairo's efforts to construct a bloc opposing Ethiopia's unilateral maneuvers over the Nile and its broader regional diplomacy.

Tensions within the Arab world surfaced clearly in Sudan, where Egypt opposed Emirati leadership in peace mediation efforts while reinforcing support for the formal national army, rejecting the RSF's claims to parallel governance. This opposition reflects wider Arab fragmentation over approaches to the Horn's instability and power struggles.

Egypt's strategic posture also included boycotting African Union evaluation missions to Somalia and delaying its troop deployment to the African Union Mission to Somalia (AUSSOM), actions signaling both frustration and caution.

During Somali President Hassan Sheikh Mohamud's visit to Cairo on July 6, discussions focused on advancing the 2024 military cooperation agreement, although underlying concerns related to the GERD dispute tempered enthusiasm.

In Sudan, Cairo bolstered its support for the formal national army, explicitly rejecting the Rapid Support Forces' (RSF) claims to parallel governance. Concurrently, Egypt strengthened ties with Eritrea, positioning itself alongside Asmara in efforts to counterbalance Ethiopia's growing regional clout.

2.2 Gulf States' Strategic Posturing in the Horn

United Arab Emirates (UAE):

- On July 5, Sudan's Sovereignty Council formally severed diplomatic relations with the UAE, accusing it of providing material support and military drones to the RSF in violation of international arms embargoes. The decision, led by SAF-aligned officials, signals the collapse of any pretensions to neutrality and centers UAE as a polarizing actor in Sudan's fractured conflict architecture.
- On July 21, Eritrean President Isaias Afwerki publicly accused the UAE of backing an Ethiopian strategy to divert regional trade from Djibouti through Eritrean ports - labeling it an attempt to undermine Djibouti's economic sovereignty. This highly charged rhetoric illustrates Asmara's alignment in the Gulf-Horn rivalry and emphasizes UAE's growing credibility and fragility in the region.

UAE's tacit support for RSF-linked factions and growing commercial footprint in the Horn have made it a target of political ostracism by Sudan and rhetorical rebuke by Eritrea, eroding its legitimacy as a mediator.

Saudi Arabia:

- On July 21, Sudan's main civilian political bloc issued a formal appeal to Saudi Arabia - alongside the UK, US, Egypt, and UAE - urging a unified international role anchored in the Jeddah Declaration framework, rather than unilateral mediation. This reflects Riyadh's perceived centrality in Horn peacemaking amid Gulf fragmentation.
- Meanwhile, Saudi Foreign Minister Prince Faisal bin Farhan held a telephone call with Eritrean Foreign Minister Osman Saleh, reaffirming the intention to deepen bilateral relations and regional cooperation, underscoring continued alignment between the two capitals.
- Although no *public* statements specific to Egypt or Ethiopia emerged in July, Saudi Arabia's ongoing engagement with the African Union chair and its continued backing for the Jeddah platform demonstrated a carefully managed approach that balances strategic patience with continuity in regional avoidance.

Riyadh remained positioned as a sober broker, advancing peace through institutional frameworks and maintaining equidistance from conflict actors.

Qatar:

- On July 3, Somaliland's President Dr. Abdirahman Irro made a landmark visit to Doha, the first by a Somaliland head of state. Qatar's reception underscored Doha's growing willingness to engage across Somalia's political divides, without explicitly challenging Mogadishu's international status.
- Alongside, Qatar issued a formal statement reaffirming Somali unity and Somalia's territorial integrity - signaling a calibrated diplomacy that engages Somaliland while upholding federal Somalia's position.
- These actions coincided with Doha's inclusion in the U.S.-hosted Sudan Quartet ahead of talks held around July 20, indicating Qatar's sustained multilateral role and capacity to engage Sudan and other Horn states within broader diplomatic architectures.
- Doha leveraged soft diplomacy, balancing symbolic outreach to Hargeisa with reaffirmation of Somali sovereignty - all while retaining a seat at Washington-led peace tables.

These dynamics reflect a broader Gulf–Horn contest in July 2025: one not anchored in military bases but in portfolios of diplomatic trust, institutional credibility, and infrastructural influence.

Section Three: Red Sea Naval Competition & Emerging Alignments

The Horn of Africa and the Red Sea corridor remain critical junctures of global power competition, where nuanced diplomatic efforts and multifaceted security engagements intertwine amid regional instability and strategic contestation. This evolving landscape is marked by a complex interplay of multilateral diplomacy, bilateral partnerships, and indirect influence through economic and infrastructural investments, reflecting a careful calibration by external actors attuned to local dynamics and global ambitions.

- The United Nations appointed China's Guang Cong as Special Envoy to the Horn of Africa. Guang Cong's role centers on fostering dialogue among fragmented states and non-state actors, facilitating conflict resolution, humanitarian coordination, and strengthening regional institutions - essential for mitigating threats that have transnational repercussions.
- The United States pursues a calibrated security and diplomatic strategy in the Horn of Africa and Red Sea region, focusing on capacity-building in Somalia through sustained military assistance targeting counterterrorism and maritime security. Washington maintains a cautious stance toward Somaliland, balancing pragmatic engagement with respect for Somalia's territorial integrity. Diplomatic efforts have shifted toward Sudan, where the U.S. convened a high-level summit with Egypt, Saudi Arabia, and the UAE to coordinate a joint approach to Sudan's instability. However, limited Sudanese government participation has constrained progress, and travel restrictions on Sudanese citizens were imposed in June 2025 amid ongoing security concerns.
- U.S. AFRICOM also conducted multiple targeted airstrikes against ISIS-Somalia and al-Shabaab, reinforcing U.S. counterterrorism commitments despite reduced support for Somalia's Danab Special Forces following revelations of financial mismanagement. This reduction has affected local operational capacities and altered alliance dynamics. Meanwhile, U.S. diplomatic engagement on Sudan included convening the Sudan Quartet in Washington, though exclusion of Sudanese officials and the cancellation of a subsequent meeting raised doubts about inclusivity and effectiveness. The U.S. also restructured humanitarian aid delivery in Ethiopia, transferring core USAID programs to direct State Department oversight, which disrupted critical services for vulnerable populations. Despite these challenges, the U.S. continues to fulfill its climate finance commitments, supporting regional resilience and adaptation projects, albeit with funding below initial targets. These developments underscore the evolving and complex nature of U.S. involvement in a strategically vital yet volatile region.
- The United Kingdom continues to sustain its diplomatic presence and humanitarian engagement, navigating fiscal constraints while leveraging multilateral forums and bilateral relations to influence regional outcomes and maintain its strategic interests. Its engagement prioritized humanitarian aid, maritime security, and diplomatic partnerships. The UK announced a £120 million humanitarian assistance package aimed at addressing urgent needs in Sudan, including food, nutrition, and protection for displaced populations affected by ongoing conflict. In response to increased security risks in the Red Sea, the UK issued maritime advisories advising vessels to avoid high-risk areas

following attacks on commercial shipping. On the diplomatic front, the UK has reinforced its regional cooperation through partnerships such as the UK-Kenya Strategic Partnership, formalized during a July meeting between UK Prime Minister Rishi Sunak and Kenyan President William Ruto. This partnership focuses on economic growth and security, particularly targeting organized immigration crime. The UK's engagement in the region remains primarily through humanitarian support and multilateral collaboration, with limited direct military involvement.

- China's approach reflects strategic subtlety and long-term vision. While it abstains from large-scale military deployments, Beijing advances its presence through extensive infrastructure investments, notably transport corridors in eastern Ethiopia and integration of the Red Sea rail networks under the Belt and Road Initiative (BRI) Phase III. These projects enhance connectivity and economic dependency, indirectly fortifying China's strategic positioning in the region, particularly across Ethiopia, Somalia, and Djibouti. This dual-use infrastructure supports Beijing's maritime ambitions and soft-security objectives without overt military footprints. At the BRICS Summit in Rio de Janeiro (July 6), Premier Li Qiang met with Ethiopian Prime Minister Abiy Ahmed to reaffirm China's commitment to the Addis Ababa–Djibouti Railway - a flagship Belt and Road infrastructure project - and to expand bilateral trade and investment solidarity between the two countries. These discussions reinforced an elevated bilateral agenda centered around economic and logistical integration. It is recalled that China also announced roughly \$1.75 billion in investments for Ethiopia in May, 2025, focused on mining and solar energy projects, including industrial zones and renewable-energy infrastructure, reinforcing its role in Ethiopia's industrial transformation.

Later in July, China convened the Third China–Africa Conference on Peace and Development for the Horn of Africa in Kampala, attended by all Horn states, IGAD, the UN, and regional bodies. Representing Beijing, Special Envoy Xue Bing framed China's approach as multidimensional - encompassing military training, counterterrorism cooperation, economic infrastructure, and governance exchanges - emphasizing Chinese support for regional dialogue, sovereignty, and holistic peacebuilding.

Separately, at the Horn of Africa Initiative Ministerial Meeting in Nairobi on July 14, regional finance and development leaders - including China-backed African Development Bank officials - emphasized digital integration as a key lever for growth and stability across the Horn, advocating coordinated public-private digital infrastructure investment. However, mounting tension also surfaced. On July 8, Germany publicly condemned a Chinese naval vessel after it reportedly used a laser to target a German surveillance aircraft operating under the EU's Aspides maritime security mission in the Red Sea. The German government formally summoned the Chinese ambassador, characterizing the incident as dangerous and unacceptable.

- Despite stalled naval base ambitions in Sudan, Russia is expanding its diplomatic footprint by preparing to open an embassy in South Sudan by late 2025. This move follows recent memoranda of understanding focused on oil exploration and mineral development, indicating a deliberate strategy to fuse political presence with resource-sector engagement. Russia has also increased scholarship offerings for South Sudanese students - rising from five to twenty-five annually - as part of broader efforts to deepen bilateral ties. It reflects Moscow's strategic recalibration, emphasizing political engagement over direct military presence amid Sudan's internal instability and RSF-government

tensions. Russia's growing involvement through diplomacy complements its broader Africa policy of leveraging political influence while navigating constrained hard power options. Ukraine's planned embassy in Sudan, scheduled for late 2025, also represents a strategic diplomatic expansion amid conflict back home. Kyiv seeks to diversify its international partnerships and assert its presence in the Horn, signaling interest in the region's geopolitics despite ongoing challenges.

- The European Union's extension of the EUCAP Somalia mission through 2027 reiterates its long-term commitment to Somali security sector reform, maritime governance, and counter-piracy efforts. This mission aligns with broader EU priorities, integrating development assistance, migration management, and security cooperation to bolster regional stability. The EU also advanced a multidimensional diplomatic and security agenda across the Horn of Africa and Red Sea region, reinforcing its role as a stabilizing actor amid widening regional volatility. EU Special Representatives Annette Weber (Horn of Africa) and João Cravinho (Sahel) convened high-level meetings in Addis Ababa with African Union and UN-AU officials to coordinate responses to the Sudan conflict and broader Horn security challenges. Discussions emphasized the importance of regional mediation mechanisms, civilian protection, and sustained diplomatic engagement—particularly in light of the stalled political transitions in Sudan and Ethiopia's unresolved internal dynamics.

Simultaneously, the EU Council extended the mandates of its three key missions -EUNAVFO ATALANTA (maritime security), EUTM Somalia (military training), and EUCAP Somalia (civilian security assistance) - through February 2027. These extensions included strengthened operational linkages with the EU's Red Sea naval mission, Operation Aspides, reflecting a broader maritime security convergence. Brussels also continued strategic dialogue with Egypt on Horn stability, highlighting its intent to balance hard security operations with diplomatic mediation and regional partnerships. The EU's approach, though often quieter than that of other global powers, continues to rely on deep institutional engagement and layered instruments of crisis management across both state and maritime domains.

- Italy's "Mattei Plan" exemplifies a holistic approach to the Horn's challenges, combining humanitarian aid, economic investment, and migration policy, especially focused on Ethiopia. By linking development initiatives with migration management, Italy seeks to address root causes of displacement while mitigating security risks associated with irregular migration flows. Italy's broader Horn engagements also extend to Ethiopia, emphasizing digital services, industrialization, and security partnerships.
- Turkey, Gulf states, and India's expanded engagement through military cooperation agreements, naval exercises, and infrastructure projects, contributing to an increasingly multipolar and dynamic regional security landscape that challenges traditional Western predominance. Turkey formalized a 10-year Defense and Economic Cooperation Agreement with Somalia in July 2025, expanding naval training and securing maritime resource rights. India launched the inaugural AIKEYME naval exercise in April 2025, involving multiple Horn countries, highlighting emerging multipolar maritime cooperation.

- Djibouti's strategic centrality is reinforced through its role as a maritime and military hub. Hosting military bases from the EU, Turkey, and the U.S., and benefiting from EU-funded maritime security upgrades, Djibouti is pivotal to securing the Bab el-Mandeb Strait and supporting multinational naval operations. Its infrastructure improvements and diplomatic balancing have positioned it as an indispensable node in regional security architectures.

This intricate matrix of diplomatic initiatives and security partnerships highlights the Horn of Africa and Red Sea corridor as a critical arena where global powers engage in a sophisticated dance of influence - combining hard and soft power, leveraging development and defense, and constantly adapting to fluid local realities. Navigating this environment requires careful balancing of competing interests and recognition of the region's pivotal role in global maritime security and geopolitical competition.

Conclusion: Strategic Reframing of the Horn – July 2025

July 2025 reconfirmed that the Horn of Africa is no longer a peripheral arena of instability but a pivotal theatre where hydropolitical tensions, maritime repositioning, insurgent threats, and economic realignments converge. The region's strategic calculus is being rewritten through overlapping logics - most notably, the reassertion of transboundary resource claims around the Grand Ethiopian Renaissance Dam (GERD), the fragmentation of proxy actors within Sudan and Somalia, and the recalibration of external naval postures across the Red Sea corridor.

Ethiopia's rising regional profile continues to benefit from a relative stability dividend, enabling assertive diplomacy and infrastructural ambition. Yet, this occurs in a landscape fractured by civil contestation, elite fragmentation, and climate-induced volatility. The Horn's transformation underscores the need for forward-looking, inclusive diplomacy that favors resilience over coercion and multilateralism over unilateral assertion.

Crucially, July's developments highlighted the Horn as a central node in global flux - where strategic competition among great powers intersects with grassroots instability and hybrid threats. The future of governance in the region will depend not only on counterterrorism coordination or hydro-political balancing but on the capacity to integrate local legitimacy, anticipatory climate governance, and credible institutional reform. Without such integrated approaches, external engagements risk deepening fragility rather than mitigating it.

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HORN **REVIEW**

Ideas

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Connections

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Synergy