The Bab el-Mandeb After the Middle East Wars

By Tsega'ab Amare

Abstract

The conventional reading of the Horn of Africa's current geopolitical moment is that Gulf states are retreating and creating a vacuum for China, Turkey, and India to fill. That reading is analytically seductive but strategically incomplete. The more defensible thesis is that the Red Sea order is being reallocated: fragmented among more actors, governed by fewer rules, and shaped by more volatile local conditions than at any point in the post-Cold War era. The Bab el-Mandeb Strait remains a live shock point for the global economy. The Gulf is not exiting the Horn, so much as splintering into competing strategies. Horn states are fractured sovereigns bargaining with geography, and that bargaining will shape influence more than external ambitions alone. Ethiopia's alignment and agency, above all others, will determine durable influence in the Red Sea corridor. Two trajectories are plausible for the coming decade: managed competition, in which Horn states consolidate bargaining power through regional institutions, or proxy escalation, in which external rivalries instrumentalize governance deficits. The policy choices that determine which prevails will be made, in the first instance, in Addis Ababa.

Introduction

There is a temptation, in moments of regional turbulence, to declare that the old order has collapsed and that a new one must logically follow. The Horn of Africa in 2026 invites exactly this temptation. The Middle East wars (encompassing the expanded Israel-Gaza conflict, U.S. and allied strikes on Houthi infrastructure, and the Strait of Hormuz crisis that followed the U.S.-Israel campaign against Iran) have visibly disrupted the network of Gulf state engagement that shaped the Horn's political economy across the preceding decade. Saudi Arabia and the UAE, once the region's dominant financial and diplomatic brokers, are now openly contesting each other's influence rather than projecting it jointly. Qatar is hedging, and the architecture of Gulf-funded stability has fractured.

The Bab el-Mandeb Strait, a wide passage at the southern end of the Red Sea connecting it to the Gulf of Aden, has not rested during this disruption. The Houthi maritime campaign, which ran in successive phases from October 2023, forced major carriers including Maersk, MSC, and CMA CGM onto Cape of Good Hope diversions, adding approximately 10 to 14 days and $1 million in fuel costs per round-trip Asia-Europe voyage.[1] The International Transport Forum estimates the annualized cost of these diversions to global trade at $15 to $20 billion; Egypt's Suez Canal revenues fell by roughly $4.4 billion in 2024 alone.[2] With the Strait of Hormuz effectively closed by Iran from late February 2026, and the Houthis signaling renewed willingness to resume broad maritime operations, the prospect of a simultaneous Hormuz and Bab el-Mandeb disruption carries a combined trade risk that analysts place at approximately $10 billion per day.[3]

The Bab el-Mandeb functions as a system-wide shock point, and that reality transforms the Horn of Africa from a recipient of external competition into a central node in global maritime security. The question is not simply who replaces the Gulf. The question is whether the Horn of Africa becomes a zone of managed competition or a theatre of repeated proxy escalation, and what agency the Horn states themselves can exercise in shaping that outcome. Ethiopia's weight in that equation, as this analysis will argue, is decisive.

[1] Santiago Sainz and Álvaro Rodriguez, "The Strategic Disruption by Houthi Forces in the Maritime Corridor of the Red Sea: Global Economic, Humanitarian and Security Implications," International Sustainable Development Observatory (ISDO), February 2025, https://isdo.ch/global-e-h-s-implications-of-houth-forces-2025/.
[2] Associated Press, "Egypt's revenue from the Suez Canal plunged sharply in 2024," April 16, 2025, https://apnews.com/article/suez-canal-egypt-gaza-houthis-israel-5a5fe98a74f64144f7aab9ceca9d87d3.
[3] Samriddhi Vij, "Double Chokepoint: Impact of a Hormuz and Bab al-Mandeb Closure," ORF Middle East, Expert Speak, April 23, 2026, https://orfme.org/expert-speak/double-chokepoint-impact-of-a-hormuz-and-bab-al-mandeb-closure/.

The Gulf Is Not Leaving

The premise that Gulf actors are retreating from the Horn due to economic exhaustion from the Middle East wars deserves scrutiny before it is adopted as a baseline. The evidence points in a different direction: not withdrawal, but fragmentation.

The Saudi-UAE rivalry,[4] which began as a managed divergence over Yemen and Qatar, has escalated into what analysts describe as an open containment contest. On 30 December 2025, Saudi airstrikes struck a UAE-linked weapons shipment at the Yemeni port of Mukalla, a kinetic intervention between nominal allies that marked a qualitative shift from strategic disagreement to active field confrontation.[5] By early January 2026, tensions peaked further when Saudi strikes targeting UAE-backed forces reportedly killed twenty separatist fighters.[6] The fault line is now structural: the UAE pursues influence through sub-state actors, port concessions, secessionist networks, and commercial footholds, while Saudi Arabia is increasingly focused on preserving state sovereignty and constructing political coalitions around established borders.

In the Horn, this divergence has a concrete expression. The UAE has built what analyst Andreas Krieg describes as an 'Axis of Secessionists,' [7] maintaining ties with Somaliland and Puntland even after Somalia's federal government voided UAE agreements in January 2026 following Israel's recognition of Somaliland.[8] DP World's operations in Berbera persist. UAE security cooperation with Puntland continues. The UAE's prior use of Eritrea's port of Assab as a logistics hub during the Yemen campaign follows the same logic: bilateral access obtained at arm's length from Asmara's formal international isolation. Meanwhile, Saudi Arabia has been quietly assembling a different coalition, one that reportedly includes Egypt, Turkey, and Qatar, oriented around recognized state governments. As one senior African diplomat told Reuters at the February 2026 African Union summit, 'Saudi has woken up and realized that they might lose the Red Sea.'[9]

Ethiopia is already implicated in this divergence. Addis Ababa's ongoing negotiations for Red Sea access, its management of simultaneous relationships with the UAE and Saudi Arabia, and its position as the Horn's demographically and economically dominant state mean that the Saudi-UAE contest in the Horn is, in part, a contest for Ethiopian alignment. Gulf involvement has not disappeared; it has become less predictable and more coercive in its local effects. In the words of Alexander Rondos, the EU's former Special Representative for the Horn, the region has become

[4] "The Growing Saudi-UAE Power Struggle in the Horn of Africa," The New Arab, February 9, 2026, https://www.newarab.com/analysis/growing-saudi-uae-power-struggle-horn-africa.

[5] "Saudi-led coalition in Yemen calls on civilians near Mukalla port to evacuate," Reuters, citing Saudi state news, December 30, 2025, https://www.reuters.com/world/middle-east/saudi-led-coalition-yemen-calls-civilians-mukalla-port-evacuate-saudi-state-news-2025-12-30/.

[6] Stephen Quillen, Caolán Magee, Tim Hume, and Nils Adler, "Fighting breaks out in east Yemen along border with Saudi Arabia," Al Jazeera, January 2, 2026, https://www.aljazeera.com/news/liveblog/2026/1/2/live-fighting-breaks-out-in-eastern-yemen-along-border-with-saudi-arabia.

[7] Andreas Krieg, "Abu Dhabi Has Built an Axis of Secessionists" (interview), Geeska, January 4, 2026, https://www.geeska.com/en/abu-dhabi-has-built-axis-secessionists-andreas-krieg.

[8] Faisal Ali, "Somalia cancels all agreements with UAE over alleged sovereignty violations," Al Jazeera, January 12, 2026, https://www.aljazeera.com/news/2026/1/12/somalia-cancels-all-agreements-with-uae-over-alleged-sovereignty-violations.

[9] Reuters, "African Union summit clouded by Saudi-UAE rivalry in Horn of Africa," February 14, 2026, https://www.reuters.com/world/middle-east/african-union-summit-clouded-by-saudi-uae-rivalry-horn-africa-2026-02-14/.

'a subsidiary arena for Middle East rivalries.'[10] The Gulf's presence has shifted from a stabilizing one to a source of structural pressure.

China: Logistical Depth Without Political Substitution

Of the external actors positioned to deepen their footprint in the Red Sea corridor, China presents the strongest material case. The launch of the $590 million Doraleh Multipurpose Port (DMP) gives Beijing a permanent hard point at the mouth of the Bab el-Mandeb. Adjacent to this commercial facility, China constructed its first and only official overseas military installation, the People's Liberation Army Support Base (People's Liberation Army Navy or PLAN), which opened in 2017 sits 28 kilometers from Yemeni territory.[11]

Combined with Chinese-financed port infrastructure across East Africa, involvement in the Doraleh Container Terminal, and the broader Belt and Road maritime architecture, China exerts influence over Red Sea corridors through a combination of commercial presence, logistical capacity, and naval reach that no other external actor can currently match in structural depth.

Yet the critical distinction is between logistical positioning and political substitution. Beijing's strategic doctrine in Africa has consistently prioritized non-interference, transactional engagement, and the avoidance of open-ended political entanglements. The PLAN's stated mandate for Djibouti (counter-piracy resupply, non-combatant evacuation, and peacekeeping support) reflects a genuine preference for bounded, functional engagement that does not require Beijing to adjudicate local political conflicts or take sides in regional rivalries.[12] This served China's interests well when the Gulf provided the political and diplomatic scaffolding around which Chinese commercial presence could operate. In the current environment, with that scaffolding fragmenting, China faces a harder choice: expand its political role to protect its economic interests or maintain doctrinal restraint and accept a thinner influence dividend.

Ethiopia's relationship with China adds a further dimension to this calculus. Beijing is Addis Ababa's largest infrastructure creditor and has financed key components of the Ethiopian rail and road network.[13] This gives China a structural stake in Ethiopian stability not replicated in its relationships with Somalia or Eritrea. But that stake has not translated into the kind of political investment that has historically defined Gulf engagement in the Horn. China can deepen its functional presence at the Bab el-Mandeb. What it is unlikely to do is substitute for the Gulf's decade of relationship-building with Horn governments, its financing of political settlements, or its willingness to absorb the reputational costs of backing local factions. China's growing presence

[10] Ibid.
[11] Lauren Ploch Blanchard, "China's Engagement in Djibouti," Congressional Research Service, In Focus IF11304, updated June 6, 2025, https://www.congress.gov/crs_external_products/IF/PDF/IF11304/IF11304.5.pdf.
[12] Han Cheng, Emma Mawdsley, and Weidong Liu, "Reading the Forum on China–Africa Cooperation (2000–2021): Geoeconomics, Governance, and Embedding 'Creative Involvement'," Area Development and Policy, published online July 19, 2022, https://doi.org/10.1080/23792949.2022.2092018.
[13] Edmond J. Pamba, "Addis Ababa Epitomizes Ethiopia's Rise under Chinese Projects," HORN International Institute for Strategic Studies, February 25, 2026, https://horninstitute.org/addis-ababa-epitomizes-ethiopias-rise-under-chinese-projects/.

in the Horn is real and consequential. It is best understood as a strategic enabler, not a replacement power.

Turkey: The Strongest Hybrid Contender

Among the actors competing for influence in the post-Gulf recalibration, Turkey stands out as the most capable hybrid power, combining military deployment, commercial investment, diplomatic engagement, and soft power tools in a way that China does not and India has not yet matched. Turkey's military training facility in Mogadishu, Camp TURKSOM, established in 2017 and expanded since, remains the largest overseas military training facility of the Turkish Armed Forces.[14] From January 2026, Turkey has moved significantly beyond the training role: three F-16 fighter jets were deployed to Mogadishu on 28 January 2026, a naval task group of four warships arrived in February, and Turkish attack helicopters and armored vehicles have been observed in operational deployments.[15] Simultaneously, SOMTURK, a joint commercial company managed by OYAK, Turkey's Armed Forces pension fund, was established in December 2025 to license and regulate Somalia's Exclusive Economic Zone, converting Somalia's maritime domain into a Turkish operational and commercial asset.[16] Turkey's oil and gas deal with Somalia, signed alongside the defense framework, ties Turkish strategic interests directly to Somali resource governance and maritime domain management in ways that no other external actor has structurally replicated.

Turkey's influence in the Horn extends beyond its presence in Somalia. Ankara has played a mediation role in the Ethiopia-Somalia normalization process, positioning itself as a diplomatic interlocutor acceptable to both governments, a role that China (constrained by its non-interference doctrine) and the Gulf states (compromised by their competing proxies) cannot currently fill. Turkey's incorporation into Saudi Arabia's emerging Horn coalition gives Ankara a degree of dual positioning: maintaining its own bilateral relationships with Horn states while operating within a broader anti-Emirati diplomatic architecture.

The limits of Turkish influence should nonetheless be acknowledged. Ankara's engagement remains operationally concentrated in Somalia, and its capacity to shape political dynamics in Ethiopia, Sudan, Eritrea, or Djibouti is thinner. Turkey's neo-Ottoman foreign policy framework generates its own frictions, particularly with Egypt, where historical antagonism over Ankara's relationships with Islamist movements complicates any unified Red Sea governance agenda. Turkey is a serious candidate for influence along the Red Sea arc, but a comprehensive regional power in the Horn it has yet to become.

[14] "Türkiye sustains efforts to bolster Somalia's security through military training at TURKSOM," TRT Afrika, source: Anadolu Agency, n.d., https://www.trtafrika.com/english/article/94b3cfa5e4d0.

[15] Samiya Mohammed, "Turkey's Somalia Policy Enters a Kinetic New Chapter," Horn Review, February 2, 2026, https://hornreview.org/2026/02/02/turkeys-somalia-policy-enters-a-kinetic-new-chapter/.

[16] Liam Karr and Michael DeAngelo, with Anahita Asudani, "Turkey Expands Influence in Africa: Africa File," Critical Threats Project, American Enterprise Institute, April 16, 2026, https://www.criticalthreats.org/analysis/turkey-somalia-niger-africa-file-april-16-2026.

India: Strategic Balancer and IMEC Stakeholder

India's expanding maritime ambitions in the Indian Ocean, together with its sustained engagement with Red Sea security through Operation Sankalp[17] and the SAGAR (Security and Growth for All in the Region) doctrine, have prompted increasing attention to New Delhi as an emerging Horn of Africa actor. That attention is partially warranted but frequently overstated.

India's practical footprint in the Horn remains thinner than its strategic rhetoric implies. Unlike China, India does not have an operational military base in the region. Its port investment discussions in Djibouti and Eritrea have proceeded slowly. Its primary lever of influence has been naval presence in the western Indian Ocean and diplomatic positioning as a counterweight to Chinese maritime expansion, a posture more visible at the level of great power signaling than at the level of local political engagement.

What sharpens India's strategic interest in the Bab el-Mandeb beyond general maritime balancing is the India-Middle East-Europe Economic Corridor (IMEC), formally launched at the G20 in September 2023.[18] IMEC is India's strategic answer to China's Belt and Road Initiative, the connectivity framework through which New Delhi has sought to position itself as the preferred infrastructure partner for the Middle East-Europe corridor. Its proposed routing through the Red Sea and Suez Canal makes Bab el-Mandeb stability a direct Indian infrastructure interest, qualitatively different from a freedom-of-navigation concern.

The economic exposure is concrete. As of June 2026, the Red Sea-Suez Canal corridor remains the primary but volatile artery for Indian commerce, with approximately 50% of India's exports and 30% of its imports historically utilizing this route..[19] Persistent disruption at the strait does not merely add costs to Indian exporters; it directly threatens the commercial viability of IMEC before the corridor has been operationalized. The Houthi campaign and the Hormuz closure have, in effect, stress-tested IMEC's founding premise simultaneously: that the Red Sea can be stabilized enough to serve as a reliable infrastructure corridor. The results of that stress test have been, at minimum, inconclusive. India's strategic case for engaging in Horn security architecture is therefore the protection of its primary geopolitical investment in the competition with China, not simply maritime balancing.

India is also increasingly attentive to the dual-use potential of Chinese infrastructure in the region. Beijing's presence at the Doraleh Container Terminal in Djibouti, proximate to the PLAN's military facility, illustrates how commercial and security functions can coexist in ways that complicate India's naval calculus in the western Indian Ocean, a concern structurally similar to

[17] "Operation Sankalp: India Monitors West Asia Security Situation," GK Today, March 6, 2026, https://www.gktoday.in/operation-sankalp-india-monitors-west-asia-security-situation/.

[18] "Progress," India-Middle East-Europe Economic Corridor (IMEC), official website, last updated April 2025, https://www.imec.international/progress/.

[19] Rao Narender Yadav, "The Red Sea Is No Longer Peripheral for India," The Secretariat, January 23, 2026, https://thesecretariat.in/article/the-red-sea-is-no-longer-peripheral-for-india; and "Red Sea route accounts for 50% of Indian exports, 30% of imports," ETAuto/The Economic Times, January 29, 2026, https://auto.economictimes.indiatimes.com/news/industry/red-sea-route-accounts-for-50-of-indian-exports-30-of-imports/107215523

India's posture regarding Chinese port investments in Sri Lanka and Pakistan. New Delhi's preferred role in the Horn is that of a multilateral security partner contributing to anti-piracy frameworks, joint naval exercises, and Red Sea governance architecture, rather than the bilateral political sponsor the Gulf once occupied. Whether that posture is sufficient to protect IMEC's long-term viability remains an open question.

Ethiopia: The Decisive Variable

No analysis of the Bab el-Mandeb's geopolitical future is complete without a dedicated accounting of Ethiopia's position. With a population exceeding 130 million, the largest economy in East Africa, and geography that places it at the intersection of every significant external competition in the Horn, Addis Ababa occupies a position in this story that no other Horn state does. Its choices will do more to determine the region's trajectory than the ambitions of any external power.

Ethiopia's most consequential foreign policy demand, and its most structurally pressing, is its pursuit of sovereign Red Sea access. Landlocked since Eritrea's independence in 1993, Ethiopia has pursued port access arrangements through Djibouti, Somaliland, and, most directly, a January 2024 memorandum of understanding with Somaliland that offered Addis Ababa naval basing rights and commercial port access in exchange for diplomatic recognition.[20] That Ethiopia, the continent's second most populous state, should seek reliable maritime connectivity is not a disruption of regional order but a structural correction to an anomaly created by Eritrea's secession. The MOU has not been operationalized, but it has permanently altered the political understanding of Horn security by demonstrating that Ethiopia is prepared to pursue access arrangements that bypass established state sovereignty norms when its core interests are at stake.

The GERD dispute is the Horn's most acute structural tension and a direct complicating factor in any Red Sea governance framework.[21] Egypt's position that Ethiopia's filling of the reservoir constitutes an existential threat to Nile water flows on which approximately 97 percent of Egypt's agriculture and drinking water depends has not moderated as filling has proceeded. Any attempt to build a unified Horn governance architecture requires grappling with this dynamic, and such an architecture remains structurally difficult so long as the GERD dispute lacks a legally binding resolution.

Egypt's response to the GERD has moved beyond diplomatic protest into active regional positioning.

The August 2024 defense agreement with Somalia, which brought Egyptian troops and weaponry into Mogadishu and embedded Cairo within the African Union Support and Stabilization Mission (AUSSOM) framework,[22] is the clearest expression of this shift: Egypt is using the Horn's internal

[20] International Institute for Strategic Studies (IISS), "The Ethiopia–Somaliland Deal," Strategic Comments, March 2024, https://www.iiss.org/publications/strategic-comments/2024/03/the-ethiopia-somaliland-deal/.

[21] Housam Darwisheh, "From Water Dispute to Security Risk: The GERD, the Nile, and the Horn-Red Sea Security Nexus," IDE-JETRO, Ajiken Policy Brief No. 269, February 27, 2026, https://www.ide.go.jp/library/Japanese/Publish/Reports/AjikenPolicyBrief/pdf/269.pdf.

[22] "Egypt Joins AU Peacekeeping Force in Somalia," Africa Defense Forum, August 4, 2025, https://adf-magazine.com/2025/08/egypt-joins-au-peacekeeping-force-in-somalia/

fractures as a containment instrument against Addis Ababa rather than pursuing bilateral engagement with Mogadishu on its own terms.

Egypt's concurrent military and diplomatic support for the SAF in Sudan, including reported drone transfers and sustained political backing,[23] carries a parallel logic. A post-war Sudan aligned with Cairo places a friendly government on Ethiopia's northwestern flank and directly constrains Addis Ababa's room for maneuver in Nile water negotiations.

Eritrea completes the perimeter. Asmara's value to Cairo derives from its Red Sea coastline, its proximity to northern Ethiopia, and its history of proxy engagements in the wider Horn. Egypt's engagement with Eritrea is fundamentally security-driven and instrumentalist rather than developmental. Bilateral trade remains negligible, and the relationship lacks any institutionalized economic cooperation.[24] President Isaias Afwerki, whose foreign policy is defined by cultivated ambiguity and deep structural antagonism toward Addis Ababa,[25] has remained receptive enough to Egyptian overtures to generate a containment effect on Ethiopia's northern frontier without formally committing Asmara to Cairo's agenda.

The pattern across all three fronts is the same: Egypt is not pursuing three separate bilateral relationships but running a coordinated perimeter strategy, exploiting the Horn's fractured sovereignty to constrain Ethiopian regional ambitions simultaneously. For Addis Ababa, the implication is that the GERD dispute has ceased to be primarily a water governance problem and has become a regional security one.

Yet Ethiopia's exposure to this perimeter strategy has not translated into strategic paralysis. Addis Ababa has responded by cultivating simultaneous relationships with actors whose interests frequently contradict each other, converting external competition for its alignment into leverage.

Ethiopia has cultivated ties with the UAE (which has invested heavily in Ethiopian infrastructure and agriculture), Saudi Arabia (with which it shares an interest in Red Sea stability), Turkey (whose mediation in the Ethiopia-Somalia normalization process Addis Ababa has welcomed), and China (its largest infrastructure creditor). This multi-alignment strategy has generated real dividends: external actors compete for Ethiopian alignment rather than imposing alignment on Ethiopia. But it also generates its own instabilities. The Saudi-UAE fracture places Ethiopia under increasing pressure to choose sides, and the structural contradictions between Addis Ababa's Nile diplomacy and its relationships with Arab states that maintain Cairo as a priority partner constrain its diplomatic flexibility in ways that bilateral leverage alone cannot resolve.

---

[23] "Could Egypt Be Pulled into the Sudanese Civil War?" *Africa Defense Forum*, March 10, 2026, https://adf-magazine.com/2026/03/could-egypt-be-pulled-into-the-sudanese-civil-war/.

[24] "Why the Egypt–Eritrea Axis Remains Fragile," *Horn Review*, December 18, 2025, https://hornreview.org/2025/12/18/why-the-egypt-eritrea-axis-remains-fragile/

[25] "Between Rhetoric and Reality: Isaias's Cairo Interview and Eritrea's Regional Posture," *Horn Review*, Nov 5, 2025 https://hornreview.org/2025/11/05/between-rhetoric-and-reality-isaiass-cairo-interview-and-eritreas-regional-posture/

The policy implication follows directly: no external actor, whether China, Turkey, India, or the Gulf states, can construct a durable presence in the Horn without Ethiopian participation or acquiescence. Whether Addis Ababa converts that centrality into genuine collective leadership of a Horn governance framework or instead maximizes its bilateral leverage in ways that deepen the region's fragmentation is the variable on which the managed competition versus proxy escalation question will most directly turn.

The Most Important Actors

The succession narrative, Gulf out and China/Turkey/India in, risks a fundamental analytical error: treating the Horn's states and non-state actors as passive terrain awaiting external management. Rather, they are fractured sovereigns with their own interests, their own capacity for strategic maneuver, and a long institutional memory of how external patrons have historically instrumentalized regional conflicts.

Djibouti's political economy is perhaps the clearest illustration. A country of fewer than one million people, it hosts at least eight overseas military bases, American, French, Chinese, Japanese, Italian, German, Spanish, and Saudi, and has used this geography with considerable sophistication to extract economic rents and political guarantees from competing external powers simultaneously.[26] President Ismail Omar Guelleh has described Djibouti's geographic position as 'our oil,' a resource to be leased rather than surrendered.[27] Foreign military rents reportedly exceed $125 million annually, a figure that gives Djibouti both the fiscal space to bargain and the structural incentive to keep multiple external patrons simultaneously engaged. Passivity is not a feature of this strategy.

Somalia's federal government demonstrated similar agency in voiding UAE agreements in January 2026, a decision with real economic costs but one that asserted the state's right to control the terms of its external relationships.[28] That this reassertion was immediately complicated by Puntland's and Somaliland's continued UAE cooperation underscores the deeper problem: external powers do not bargain with unified sovereigns in the Horn. They bargain with fractured political orders in which federal governments, regional administrations, port operators, and armed movements all maintain independent relationships with outside actors. Influence in this environment is never clean, never durable, and always contingent on maintaining multiple simultaneous relationships that frequently contradict each other.

Eritrea occupies a peculiar position in this architecture. Its Red Sea coastline, and in particular the port of Assab, gave the UAE a critical logistics and staging base during the Yemen campaign, enabling Emirati military operations at a time when Asmara maintained no formal diplomatic

[26] Lauren Ploch Blanchard, "Djibouti," Congressional Research Service, In Focus IF11303, updated June 9, 2025, https://www.congress.gov/crs_external_products/IF/PDF/IF11303/IF11303.8.pdf.

[27] Faisal Ali, "'Our geography is our oil': Why Djibouti hosts many foreign military bases," Al Jazeera, April 8, 2026, https://www.aljazeera.com/news/2026/4/8/our-geography-is-our-oil-why-djibouti-hosts-many-foreign-military-bases.

[28] Michael DeAngelo, Yale Ford, and Liam Karr, "Somalia Cancels UAE Agreements; Sudan-Pakistan Arms Deal: Africa File," Critical Threats Project, American Enterprise Institute, January 15, 2026, https://www.criticalthreats.org/analysis/somalia-cancels-uae-agreements-sudan-pakistan-arms-deal-potential-inter-congolese-dialogue-africa-file-january-15-2026.

relations with most of the region's key actors. President Isaias Afwerki has since allowed that relationship to cool without replacing it with any clear alternative alignment, a posture of cultivated ambiguity that is itself a form of leverage. Eritrea offers external actors enough geographic value to remain strategically relevant and enough opacity to avoid the commitments that relevance might otherwise require.

Toward Managed Competition

The sharpest analytical question for Horn policy researchers is not who fills the vacuum, but what kind of external competition the Horn is being drawn into, and whether regional institutions can constrain its most destabilizing expressions.

Two trajectories are plausible. In the first, the Red Sea becomes a zone of managed competition: external powers develop implicit rules of engagement, Horn states consolidate collective bargaining leverage through the African Union and IGAD, and the Bab el-Mandeb's economic importance creates enough shared interest in maritime stability to discipline the most reckless forms of proxy intervention. In the second, the Horn becomes a theatre of repeated escalation: the Saudi-UAE rivalry deepens, external actors continue to finance competing factions in Sudan and Somalia, and IGAD's institutional authority erodes further under the weight of its members' competing alignments.[29]

The 2026 evidence leans pessimistically, but the assessment should not be collapsed into determinism. Managed competition has structural preconditions that are identifiable, and the gap between the current trajectory and those preconditions can be measured.

The first precondition is Ethiopian strategic consolidation. For managed competition to take root, Addis Ababa must move from bilateral leverage maximization toward collective regional leadership, which means, concretely, prioritizing IGAD reform, accepting constraints on the Somaliland MOU that reduce its sovereignty-threatening valence for neighboring states, and engaging the GERD dispute through a multilateral framework capable of producing a legally binding agreement. None of these steps is costless, and none is likely in the near term without external incentives sufficiently large to offset the domestic political costs.

The second precondition is a Gulf de-escalation sufficient to reduce the coercive pressure on Horn states to choose sides. The Saudi-UAE rivalry shows no structural signs of resolution, and the Mukalla strikes suggest that field-level confrontation between the two powers is now a possibility rather than a theoretical risk. However, both Riyadh and Abu Dhabi have converging economic interests in Red Sea stability. Saudi Vision 2030's port and logistics investments and Emirati DP World concessions both depend on functional maritime corridors, which creates a potential basis for a narrow, interest-based maritime security compact even in the absence of broader strategic alignment.

[29] International Crisis Group, "Intra-Gulf Competition in Africa's Horn: Lessening the Impact," Report No. 206, Middle East & North Africa, September 19, 2019, https://www.crisisgroup.org/rpt/middle-east-north-africa/gulf-and-arabian-peninsula/206-intra-gulf-competition-africas-horn-lessening-impact.

The third precondition is a multilateral framework with genuine institutional weight. The establishment of a Regional Technical Committee on maritime governance, multilateral port-sharing and transit frameworks, and coordinated Horn positions in international fora on Red Sea security would represent meaningful structural steps. The precedent of IGAD's Drought Disaster Resilience and Sustainability Initiative, a technical body that maintained functional cooperation during periods of high political tension among members, suggests that technical-level engagement can survive political fracture if its mandate is sufficiently narrow and its secretariat sufficiently insulated.

The leading indicators that would signal movement toward managed competition are: Ethiopian engagement in a multilateral GERD framework; a Horn joint position on Red Sea governance tabled at the AU Peace and Security Council; a DP World and Saudi port authority memorandum on shared Bab el-Mandeb management; and an Indian naval presence formalized through a multilateral rather than bilateral arrangement. None of these has materialized as of mid-2026. All are analytically possible within a three-to-five-year horizon if the political conditions shift.

Conclusion

What the Bab el-Mandeb is experiencing is power dispersal rather than a power vacuum: a shift from a Gulf-centered architecture of engagement toward a more crowded, less coordinated, and more volatile contest among actors with partially overlapping and frequently conflicting interests.

China offers logistical depth but not political substitution. Turkey is the most capable hybrid contender, having crossed from indirect partner to overt operational participant in Somalia, but its reach remains concentrated there. India's strategic stake is sharpened by IMEC and by concern about Chinese dual-use infrastructure in the region, but the simultaneous Houthi and Hormuz disruptions have stress-tested IMEC's viability in ways New Delhi cannot resolve through naval presence alone. The Gulf has not left the Horn; it has fractured, making its presence less stabilizing and more coercive in its local effects.

The most consequential variable in this picture is Ethiopia. Addis Ababa's choices on Red Sea access, GERD diplomacy, and regional institution-building will determine whether the Horn can exercise collective agency over the terms of external competition, or whether that competition deepens the fractures through which outside powers have always entered. Red Sea instability has structurally merged African and Middle Eastern strategic theatres: what happens at Bab el-Mandeb no longer stays there.

Whether the Horn becomes an autonomous node in that merged order or a permanently contested buffer zone is the defining geopolitical question of the coming decade. The answer will be shaped less by the ambitions of external powers than by whether the Horn's fractured sovereigns, above all Ethiopia, find the institutional and political capacity to bargain collectively rather than individually. The conditions for that shift are not yet present. The window for creating them is open.