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New powers in the Horn of Africa: the end of Western hegemony

Introduction: The Horn of Africa

The Horn of Africa today serves as a strategic pivot where the security of the Red Sea intersects with the ambitions of emerging powers (the UAE, Turkey, Saudi Arabia) and global powers (China, Russia, the US).



Figure 1. Map of the Horn of Africa. Source: Wikimedia Commons

Given this privileged location, it must be understood that the strategic importance of this region is particularly significant because it connects Africa, the Middle East and Asia, making it vital for international maritime security, global trade and the geopolitical stability

of the Middle East and Europe. It is a crystal-clear African example of ‘chessboard geopolitics’: the concept Brzezinski applied to Eurasia in *The Grand Chessboard* when he highlighted that certain regions, even if peripheral, hold a key position on trade routes because they harbour resources or are situated near rival powers. The Horn of Africa more than meets these three conditions.

Thus, Eritrea holds strategic importance of the first order due to its ports at Assab and Massawa. Djibouti, although a small country, enjoys a location on the Bab el-Mandeb Strait that makes it significant in the eyes of foreign powers. Somalia is a double-edged sword, for whilst it is key to maritime trade, it is equally central to regional conflicts. Finally, Ethiopia, by far the largest country in the region, compensates for its lack of access to the sea with its political and economic clout.

The region is rich in critical minerals, gold, oil, gas and arable land, as well as in what is known as the blue economy. Furthermore, the four countries have regional and international significance—and, consequently, rivalry. It is on this last point—their international ambitions and presence—that this chapter will focus.

MATRIZ DE INFLUENCIA ESTRATÉGICA

PAÍS	EEUU	CHINA	RUSIA	FRANCIA	TURQUÍA	EAU	A.SAUDÍ	CATAR	UE	ITALIA
ERITREA	□	■	■ ■	□	■	■	■ ■	□	□	■
YIBUTI	■	■	□	■	■	■	■ ■	■	■	■
SOMALIA	■	■	□	□	■	■	■ ■	■ ■	■	■ ■
ETIOPIA	■	■	■ ■	□	■ ■	■ ■	■	■	■	■

CÓDIGO DE INTENSIDAD:

- ■ Verde: Influencia **muy destacada** (Socio estratégico de primer orden).
- ■ ■ Mixto: Influencia **notable** (Combinación de intereses o peso compartido)
- ■ Amarillo: Influencia **media** (Socio relevante, pero con menor peso político)
- □ Blanco/Gris: Influencia **baja o nula**.

Eritrea

With an area of less than 120,000 km²—a quarter the size of Spain—Eritrea is a small geopolitical giant, the David of the Red Sea, whose coastline makes it a key and powerful player in international security and trade (Yeh, 2026). Eritrea controls the Bab el-Mandeb Strait, one of the world's most critical trade routes due to its geographical position, but also because of its port infrastructure.

Under the leadership of Isaias Afwerki, the country has evolved from extreme isolation to becoming a strategic player that leverages its coastline to attract powers seeking a presence in the Red Sea.

China

China's presence in Eritrea is deep-rooted and structural, based on a strategic partnership consolidated over decades of mutual support. Unlike other actors, China is Eritrea's main trading partner and a key ally in its long-term development strategy (Embassy of the People's Republic of China in Eritrea, 2024).

Chinese companies are thus involved in mining projects—for example, they operate the Bisha mine, the country's largest producer of zinc and copper—infrastructure modernisation—ports and roads, and investment in telecommunications (Kun, 2026)—and the sale of manufactured goods to Eritrea—ranging from heavy construction machinery to electronics and textiles.

Russia

Moscow's influence in Eritrea stems from its desire to maintain a growing strategic presence focused on military and defence cooperation, as well as diplomatic ties, in the Red Sea. The Kremlin exploits these links with Asmara to mitigate the diplomatic isolation it faces and to consolidate a platform for maritime projection in the Red Sea region. The relationship between the two countries is more political than economic.

Eritrea is one of the few countries that publicly supports Russia in international forums. A significant example of this was its 'No' vote on the resolution calling for an end to the

Russian offensive in Ukraine at the UN General Assembly in March 2022 (United Nations, 2022). For its part, Russia, a member of the UN Security Council, protects Eritrea with its veto (Méndez Urich, 2021).

Furthermore, Russia sells arms to and trains the Eritrean Armed Forces. Moscow does not, as yet, have an operational military base in the African country, but there is naval cooperation and Russian frigates (TurDef, 2024) use the port of Massawa (Africa Defense Forum, 2023).

United Arab Emirates

In 2015, the UAE and Eritrea signed a thirty-year lease agreement for the port and airport of Assab. Abu Dhabi's aim was to establish a military base there for its war with Yemen, which had begun that year and has been in a lull since 2022.

With tensions easing, Abu Dhabi has focused its efforts on southern Yemen, prioritising control of strategic ports such as Aden and Mukalla by supporting its allies in the area. After beginning the dismantling of its base in Assab in 2021 (Associated Press, 2021), it abandoned it permanently in 2026.

At the same time, it has prioritised its relationship with Egypt, where it is the largest foreign investor, leading to a definitive estrangement from Eritrea. Saudi Arabia has capitalised on this vacuum, positioning itself as Asmara's new preferred partner (McGregor, 2023).

Saudi Arabia

For the Saudis, Eritrea is a key component of their security architecture and their ambition to establish themselves as a 'global logistics hub', a central objective of Vision 2030 (Saudi Arabia, n.d.). The new regional landscape, marked by the strategic withdrawal of the United Arab Emirates, has facilitated the implementation of this vision and reinforced Riyadh's leadership in the Red Sea (Ardemagni, 2024). As a first step, Saudi Arabia has announced multi-billion-dollar investments to modernise the port of Assab, with the aim of transforming it into a commercial hub capable of competing with Djibouti (Horn Review, 2025) and securing its control over the Bab el-Mandeb Strait.

Whilst Abu Dhabi is pursuing a disruptive policy—supporting Ethiopia or Somaliland (Saudi Arabia, n.d.)—Riyadh has formed a containment bloc bringing together Egypt¹, Eritrea, Somalia and Sudan under its influence. By leading this coalition, Saudi Arabia exercises effective hegemony over both shores. In the words of the analyst, Rebecca Mulugeta (2026), the kingdom now ‘owns the waves of the Red Sea’.

In this new situation, Eritrea finds in Saudi backing a guarantee of security against Ethiopia’s ambitions to regain a sovereign outlet to the sea. In turn, Eritrea serves as a containment barrier for Iran in the Red Sea for Riyadh (Zina, 2025).

France

France is not a new player in the region; however, its collaboration with Eritrea is not particularly close, as the French concentrate their resources in Djibouti, where they maintain their largest military base on the African continent.

France’s relationship with Asmara is more one of strategic vigilance and the pursuit of a regional balance that prevents the emergence of a hostile hegemonic power. Its primary interest is to prevent instability that could jeopardise navigation through the Bab el-Mandeb Strait, a vital chokepoint for the European Union’s economic security (Maiz, 2025).

Through patrol missions from Djibouti (Bernacchi, 2025) and cooperation on maritime intelligence, Paris seeks to ensure that the growing presence of external powers in Massawa and Assab does not lead to a tactical blockade of the trade corridor, positioning itself as a moderating force in an increasingly polarised landscape.

Italy

Italy’s presence in Eritrea goes beyond the commercial sphere; it represents a geopolitical commitment to security and migration control under the framework of the Mattei Plan (El Debate, 2024) for Africa, promoted by Giorgia Meloni’s Government. Rome operates on the premise of applied external security: to economically stabilise Isaias Afwerki’s regime

¹ Economically, Egypt is an ally of the United Arab Emirates. Militarily, it is an ally of Saudi Arabia. Cairo is radically opposed to any redrawing of borders in the Red Sea or the Nile.

and strengthen its border control capabilities to reduce migration flows towards the Italian coast, investing at source to mitigate the crisis in the Mediterranean.

Italy is capitalising on a latent cultural connection—the use of the language and the architectural heritage in Asmara—to position itself as the ‘natural partner’ *vis-à-vis* actors such as Russia or China, perceived as powers alien to local sensibilities.

Italy is applying its own ‘pragmatism of survival’ to ensure its relevance in the Horn of Africa. At the time of writing this chapter, discussions are underway to develop critical infrastructure in Massawa and, potentially, in Assab, with the aim of reintegrating Eritrea into global markets and preventing the Red Sea coastline from falling under the exclusive control of Eurasian blocs (Berhane, 2025).

In conclusion, Eritrea has established itself in the eyes of global powers as a ‘natural aircraft carrier’ in the Red Sea. Whilst the UAE has ceded ground to Saudi Arabia, which sees Asmara as a security shield and a hub for its economic expansion, other actors define their presence according to specific interests. Thus, Russia views it as a strategic military foothold; France, as a stabilising factor requiring constant monitoring from Djibouti; and Italy, as a key partner for migration management and infrastructure development under the Mattei Plan.

Djibouti

Djibouti is a small country—about the size of the Community of Madrid—which has made the leasing of its land its main source of income. It enjoys a privileged geographical location and a stability that is difficult to disrupt (Sánchez Martín, 2018)—it maintains a peace guaranteed by external interests—qualities that make this small republic an object of desire.

This does not mean that it is free from internal tensions, such as ethnic conflict, inequality or migratory pressure. Ultimately, the country’s fragility is kept in check by international powers that demand stability for their own ends, requiring Djibouti to serve as a strategic hub that must remain operational 24/7.

Djibouti’s flagship products are this aforementioned stability and its location, but they are no longer the only ones. This small country has evolved, moving from living solely off the

leasing of land and ports to transforming its territory into the world's most strategic service hub, charging global powers for its use (De Waal, 2017: 14). It has moved beyond being a passive rentier to becoming a hub for logistical, digital and military services.

Djibouti is no longer just a military base for foreign powers; it is now the critical infrastructure, its services and maintenance, that connect Africa with the rest of the world (Du Couëdic, 2025). It is the paradox of survival: Djibouti is too small to be a threat, but increasingly too important not to be defended. In this way, it turns its weakness into its strength.

This need to be defended is put to the test following the war waged by Israel and the United States against Iran, which began in March 2026, and the subsequent events. Tehran has established itself as a player capable of disrupting maritime routes; a power with marginal influence compared to the financial might of the Gulf states or Turkey, but with a capacity for asymmetric sabotage that could upset the relative stability of the entire Horn of Africa.

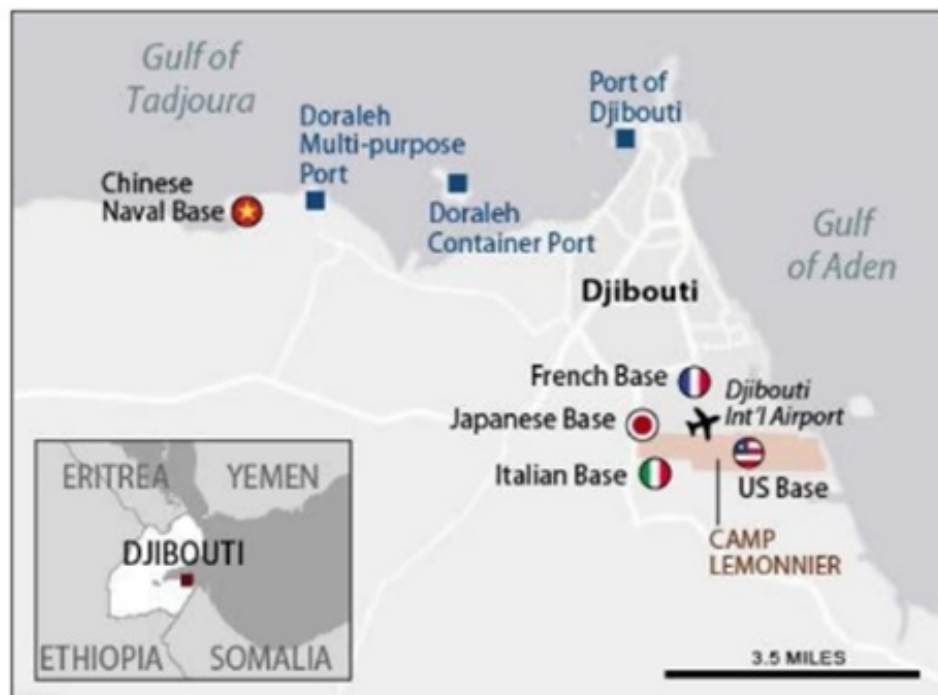


Figure 3. Map showing ports and foreign military bases in Djibouti. Source: CRS

United States

Since the 11 September attacks, the United States has leased Camp Lemonnier to Djibouti. It is the only permanent US base in Africa and also, or precisely for that reason, its most critical facility as it serves as its nerve centre on the continent (SwissInfo, 2017). Its significance lies in its ability to project immediate military power across two continents and monitor access to the Red Sea.

Camp Lemonnier acts as a force multiplier. The US contingent's primary mission is not the defence of the facility, but the management of an advanced technological infrastructure from which counter-terrorism operations and drone missions against Al-Shabaab and Al-Qaeda are directed.

The US thus positions itself as the guarantor of regional security, more interested in who manages the ports than in administering them directly, thereby preventing the flow of crude oil from falling under the control of rivals such as Iran or China. For its part, the UK maintains a reduced presence, relying on US logistics for technical stopovers.

China

Opened in 2017, the People's Liberation Army (PLA) Support Base in Djibouti, a few kilometres from the US base, was China's first military facility abroad.

This base grants China naval power and also secures China's economic control over the country, underpinned by the overwhelming debt² and the construction of the port of Doraleh and the railway to Ethiopia.

Unlike Camp Lemonnier, which focuses on counter-terrorism, the Chinese base prioritises the protection of its trade routes and serves as a hub for its long-range expeditions³. To this end, China employs a 'dual-use' strategy: civilian infrastructure that evolves into military capabilities (Stone and Wood, n.d.). This is an 'opportunistic evolution' in which commercial ports end up hosting warships and aircraft carriers, functioning as multidimensional tools for military intelligence and logistics (Kennedy and

² China is Djibouti's largest creditor. According to the US Congressional Research Service (CRS), Chinese institutions (primarily the Exim Bank of China) hold more than 50% of the country's total external debt. See: https://www.congress.gov/crs_external_products/IF/PDF/IF11304/IF11304.5.pdf

³ See: https://www.congress.gov/crs_external_products/IF/PDF/IF11304/IF11304.5.pdf

Brzozowski, 2025). This ‘civil-military fusion’, dictated by the Communist Party (U.S. Department of State, n.d.), contrasts with the purely military deployment of the US.

Financially, China is Djibouti’s largest creditor (International Monetary Fund, 2025). Such debt grants Beijing an informal veto over the country’s decisions and compromises its economic autonomy. This financial stranglehold is precisely what explains why Djibouti is seeking a strategic counterweight in Saudi Arabia to diversify its support.

Today, China remains the power with the greatest structural presence in Djibouti, although Saudi Arabia is the actor most rapidly challenging its political and strategic ground.

Saudi Arabia

A Djibouti suffocated by debt to Beijing compromises its sovereignty, a scenario that Saudi Arabia seeks to reverse to prevent a strategic neighbour from depending on a single power. By intervening in Djibouti’s financial relief through refinancing or direct investment, Riyadh not only reinforces its role as a regional power but also secures an advantageous position in any future diplomatic negotiations.

Saudi Arabia is rapidly increasing its presence and influence in Djibouti, whilst that of the United Arab Emirates is waning, making it an emerging leader.

Currently, its strategy rests on two commercial pillars. In 2024, it secured the concession for a strategic logistics zone, guaranteeing a direct route for its exports to the continent (Agenzia Nova, 2024a). A year later, it consolidated this expansion through the company Red Sea Gateway Terminal, which secured the concession to operate the port of Tadjourah (Kontos, 2025).

On the military front, negotiations remain pending for the opening of its first overseas military base, which is planned specifically on Djiboutian soil to complete its security architecture on both sides of the Red Sea.

Turkey

Whilst Saudi Arabia is currently focusing on port and trade logistics, Turkey is working to establish a presence that shapes identity and distances itself from criticism that highlights purely financial interests. A prime example is the Ambouli Friendship Dam, completed in 2019. Funded and built by Turkey, it protects the capital—home to 75% of the population—from catastrophic flooding whilst helping to replenish groundwater reserves.

In line with its regional strategy of cultural outreach, Turkey has built the country's largest mosque, the Abdulhamid II Mosque (Mundo Islam, 2019), consolidating its role as a religious leader. At the same time, it has established itself as a key technological and defence partner through the sale of drones (Baykar, 2022), the training of Djiboutian troops and the supply of tactical equipment. Currently, Ankara shows no interest in establishing a military base in Djibouti—given that it already has a major facility in Somalia—, preferring to maintain its role as a civilian ally and religious brother in the Horn of Africa.

Russia

Russia lacks a military base in Djibouti due to persistent diplomatic and financial pressure from the United States on the Djiboutian Government. The US refusal could also be the reason why its attempts to establish a base in Port Sudan are failing (Sudan Tribune, 2025). Faced with this scenario of exclusion, Moscow has redirected its strategy towards Eritrea to secure its 'share of the pie' in controlling the Red Sea. The Kremlin considers its presence in this sea lane to be an absolute priority.

France

The French presence is the oldest and largest of the European Union in the country. It is consolidated through its BA 188 base, the largest on the African continent for the French, to maintain its influence and provide a platform for its operations in the Sahel and the Indian Ocean.

Unlike other actors, France's relationship with Djibouti is defined by an existential commitment: through a defence cooperation treaty, Paris guarantees the territorial

integrity of the Djiboutian state. This security clause, Article 4, implies that, in the event of any external aggression or attempted invasion, France is legally obliged to intervene militarily (French Republic, 2014).

Spain, Italy and Germany

The European Union's presence is primarily focused on the security of trade routes under the mandate of Operation Atalanta (Ministry of Defence, n.d.)—focused on combating piracy—and also through the EUNAVFOR ASPIDES mission (European Union, n.d.), whose continuation until February 2026 is critical to protecting maritime traffic from asymmetric threats and Houthi attacks in the Red Sea.

Lacking sovereign facilities, countries such as Spain and Germany operate under the umbrella of French infrastructure. Spain maintains the Orion Detachment (Ministry of Defence, 2024) of the Air and Space Force deployed at the French base under the Atalanta framework, providing vital maritime patrol and electronic surveillance capabilities. Italy, by contrast, represents an exception within the bloc as it has a permanent base, which not only supports EU naval missions but also serves as a key logistical hub for its own strategic interests in Somalia and in containing migration flows.

Japan

The establishment of the Japan Self-Defence Forces (JSDF) facility in Djibouti represents a historic milestone. It is Tokyo's first and only military base outside its archipelago since the end of the Second World War. Although its original deployment in 2011 was justified under the mandate of combating piracy in the Gulf of Aden, by February 2026 its mission had shifted towards a purely strategic function (Japan, 2022: 29).

Japan has significantly expanded the base in a deliberate effort to counter the hegemony of the neighbouring Chinese base (Kubo, 2026). This expansion not only seeks to protect its vital supply routes, but is also part of Japan's new security doctrine, which aims for a proactive presence in the Indo-Pacific and the Red Sea.

Qatar and the United Arab Emirates

Qatar acted as a mediator in the border dispute between Djibouti and Eritrea (Reuters, 2017). It is an investor in the hotel sector and in humanitarian projects. The United Arab Emirates, for its part, has a strained relationship with the region and, since its expulsion from the port of Doraleh in 2018—a space subsequently occupied by China—its presence has shifted to the ports of Eritrea and Somalia.

The coexistence of different powers reflects the fact that the country is now a key hub in the global balance of power. With bases just 12 kilometres apart, Djibouti has become a hotbed of tension where rival soldiers keep a watchful eye on one another through binoculars and radar. Any miscalculation in this ‘cold peace’ could rapidly escalate a spy conflict into open confrontation, although this is not a very plausible scenario given their shared interests.

Somalia

Like Eritrea and Djibouti, Somalia also enjoys a highly significant geostrategic position, or even more so, due to the length of its coastline—the longest on the African mainland (over 3,000 km)—and its dual access to the Red Sea and the Indian Ocean.

It continues to be regarded as one of the world’s most fragile states (The Fund for Peace, 2024). Despite this, the country has shifted from being perceived solely as a hotbed of piracy and terrorism to becoming a political marketplace where sovereignty is auctioned off (De Waal, 2014) and the capacity of the major powers to rebuild—or act as guardians of—a state for their own benefit is measured.

Unlike Djibouti, a small but stable country, and Eritrea, an authoritarian but centralised state, Somalia has endured decades of state fragmentation and has long been regarded as the epitome of a failed state. This facilitated, and continues to facilitate, phenomena such as piracy or the presence of armed groups such as Al-Shabaab or the ISIS affiliate known as Islamic State – East Africa Province (IS-CAP), amongst others.

Its institutional weakness has turned Somalia into a geopolitical space open to indirect competition between powers such as China or the United States, Ethiopia and Egypt, or the United Arab Emirates versus Qatar and Turkey. The paradox lies in the profitability of

the situation, given that its weakness is its greatest asset for external powers. Recently, a disruptive action has polarised the various presences and alliances in the country, as will be seen below.

On 26 December 2025, Israel officially recognised the Republic of Somaliland as an independent and sovereign state (Chome, 2026), with the aim of thereby gaining a foothold against the Houthis. This diplomatic formality has sent shockwaves through alliances in Somalia, and in the Horn of Africa in general, because the underlying concern is the future of the security architecture in the Red Sea.

In response to Israel's actions, two blocs have emerged in the Red Sea, reminiscent of the Cold War. The defenders of Somali unity: Turkey, Qatar and Saudi Arabia, and the axis supporting the autonomous regions, led by Israel and the United Arab Emirates. China, the United States and the EU maintain positions based on preserving the international *status quo*, albeit with strategic nuances that bring them closer to the Mogadishu bloc insofar as they advocate respect for territorial integrity.

United Arab Emirates

In January 2026, the Somali Government annulled all agreements it had with the United Arab Emirates, citing Emirati actions deemed 'detrimental to the country's sovereignty, national unity and political independence' (Al Mayadeen Español, 2026). Abu Dhabi's support for Israel's backing of Somaliland's independence was a decisive factor in this expulsion (EFE, 2026a). Nevertheless, the United Arab Emirates continues to maintain a presence in the Somali autonomous regions of Somaliland, Puntland and Jubaland, and specifically in the ports of Berbera and Bosaso (Mohamed, 2026). There, the central government has little presence, although it does control the airspace and could take drastic expulsion measures. In any case, there is no indication that relations between the two countries will improve in the short or medium term.

Somalia has responded by seeking support from Turkey and Saudi Arabia, recently (February 2026) signing new military cooperation agreements to counter Israeli 'interference' in what they consider their national territory (Al Jazeera, 2026).

Turkey

Turkey's dominant presence in Somalia is the result of a decade of incremental steps that accelerated in 2024. In February of that year, Ankara signed an agreement (Agenzia Nova, 2024b) whereby Mogadishu granted it defence authority and exploitation rights over its waters for ten years. Somalia's ultimate aim is to curb any potential move by Ethiopia regarding its ambitions for access to the sea, given that, in January, it had signed a memorandum of understanding (MoU) with Somaliland in which it would recognise it as an independent country in exchange for a port.

Turkey is responsible for security along the entire Somali coastline, including that of Somaliland, although this responsibility is not exercised *in practice*, as the region has its own agreements with Ethiopia and the United Arab Emirates.

Pragmatism and, more recently, Turkey's military muscle in Mogadishu demonstrate that the Western presence, based on conditional development aid, is no longer the only option—nor the most attractive one—for African governments (Mesa, 2024).

Turkey controls the country's logistics hubs. The Somali capital is home to Turkey's largest base outside its borders: Turksom. From there, it controls maritime routes and protects Somalia's waters (Ibáñez, 2024). It also manages Mogadishu's international airport and port. Finally, by the end of 2025, Turkey had planned to complete its rocket launch site in Somalia (EFE, 2023), but that milestone has been delayed.

In return, Ankara has negotiated a dominant stake in future offshore hydrocarbon exploration and production in Somalia (Kimani, 2026), trains part of the Somali army and promotes the sale of its own military equipment (*hard power*). As part of the soft power exercised by Turkey, it is worth noting that a significant proportion of the Somali army already speaks Turkish (Kasapoglu, 2020). Along the same lines, it is also gaining influence through its aid, such as the construction of hospitals and schools.

In Somalia, Turkey has executed a textbook example of what political scientist Joseph Nye termed '*smart power*': the strategic blend of military force with cultural and economic appeal; hard power combined with soft power. Part of the latter involves ensuring that its presence is not perceived as an occupation, but rather as a necessary partnership.

Saudi Arabia

Before Israel's recognition of Somaliland, Riyadh's primary concern was to prevent non-Arab powers or rivals, such as Iran or even Turkey, from controlling both sides of the Red Sea. In the context of 2026, Turkey and the Saudis have become partners of convenience. Riyadh prefers Turkey to Israeli or Ethiopian influence in the region. Its presence was primarily economic and diplomatic (Vertin, 2019) in areas of soft power.

Israeli recognition has, among many other things, altered that trend. An example of this shift is the signing, in February 2026, of a military cooperation agreement between Saudi Arabia and Somalia (Shabelle Media Network, 2026). This agreement came immediately after Somalia severed its security agreements with the UAE.

Despite the aforementioned military cooperation agreement, Saudi Arabia's role is that of a financial and diplomatic partner in areas of hard power. It is Turkey that exercises direct military power.

As seen above, by early 2026 Turkey had established itself as the sole operational military guarantor of Somalia's territorial integrity. Turkey provides the F-16 fighter jets, the boots on the ground and the naval vessels; Saudi Arabia provides the regional legitimacy and the resources necessary to prevent the Somali state from collapsing.

Qatar

By February 2026, Qatar's presence in Somalia had intensified significantly, becoming a pillar of the new 'Arab security umbrella' supporting the federal government in Mogadishu (Islam Times, 2026).

On 19 January 2026, Qatar and Somalia signed a defence cooperation agreement in Doha (Mobio, 2026). This pact also seeks to fill the void left by the United Arab Emirates (UAE).

Qatar, like Saudi Arabia, also acts in close coordination with Turkey. Thus, whilst Turkey provides direct military muscle (such as the deployment of F-16 fighter jets), Doha provides the financial and diplomatic backing necessary to sustain the federal government's institutions. The funding sectors of Qatar and Saudi Arabia are not the same. Qatar has been a loyal and constant ally of the current administration and focuses

on intelligence, funding and training for the civilian administration. For its part, Saudi Arabia has recently joined in the support and focuses on the defence budget.

Egypt

In February 2026, following the withdrawal of Emirati troops from Somalia, Egypt completed the deployment there of ten thousand troops, helicopters and drones (Asem, 2024). Egypt has established itself as Somalia's most important land-based military ally, forming, alongside Turkey, Qatar and Saudi Arabia, the bloc defending the country's unity against Israel's recognition of Somaliland.

Egypt had already begun a significant military deployment in August 2024 (Sadek, 2024), driven primarily by its rivalry with Ethiopia and, in particular, following the signing of the memorandum with Somaliland.

When Israel recognised Somaliland in December 2025, Egypt already had an established military infrastructure and a legal and diplomatic framework in Somalia. Israel's announcement prompted Egypt to accelerate and expand its military objectives (Foundation for Defense of Democracies, 2024).

For Egypt, Somalia is a key theatre for its own security, as it relies on Mogadishu in its disputes with Ethiopia over Nile water (Palacián de Inza, 2025). Egypt's approach towards Ethiopia is indirect: by supporting Somalia and its unity, it prevents Addis Ababa from gaining access to the sea via Somaliland.

China

Like Egypt, Saudi Arabia and Turkey, China supports the unity of Somalia. Similarly, Somalia adheres to 'the One-China principle' (Ministry of Foreign Affairs of the People's Republic of China, 2026). The difference lies in the fact that Beijing does not support Mogadishu through a military deployment, but rather through high-level diplomacy within the UN Security Council (Ministry of Foreign Affairs of the People's Republic of China, 2026), for example, and, following its model of infrastructure diplomacy, through infrastructure development: port modernisation (New Mogadishu Development

Corporation, n.d.) and investment in renewable energy, agriculture and fisheries (Jain, 2025).

China competes directly with the Turkish companies that manage the port of Mogadishu, and is therefore seeking business in secondary ports such as Kismayo.

USA

The US remains, by far, the largest donor of humanitarian aid to Somalia (OCHA Services, 2024). This leading position responds to several strategic needs: acting as a shield against Al-Shabaab, facilitating greater acceptance of the US presence among the population, gaining access to the Red Sea, and helping to contain Chinese influence (US Congress, 2025).

In 2026, the US maintains air superiority through drone operations and the training of the elite Somali Danab brigade, but has lost its monopoly on political and economic clout in the face of Egypt's military might and China's financial power.

In February 2026 (Office of Inspector General, 2025), new funds were announced for the stabilisation of areas recently liberated from Al-Shabaab, possibly seeking to prevent China or Gulf actors (such as Saudi Arabia) from monopolising civilian reconstruction. There is also competition with Turkey, albeit on another front: Turkish drones now operate in the same airspace as those from the US. Furthermore, Somali intelligence no longer relies solely on American satellites, and this represents a critical loss of control for the US.

Currently, the US is just another player in the military sphere, seeking to remain vigilant so as not to lose further influence, although decisions to cut aid could prove costly.

EU

The European Union's presence in Somalia is almost exclusively operational and technical. This takes the form of its on-the-ground missions, which have been extended until 2027 (Inforpuertos, 2025). These missions are (Ministry of Defence, n.d.): EUTM Somalia, focused on training the Somali National Army (SNA); EUCAP Somalia, a civilian

mission advising the police and coastguards; and Operation Atalanta, often led by Spain, which patrols the Somali coastline, protecting World Food Programme ships and monitoring traffic in the Red Sea.

Furthermore, although it is an African Union mission, with the transition from ATMIS (African Union Transition Mission in Somalia) to the new AUSSOM (African Union Support and Stabilisation Mission in Somalia), the EU remains the main contributor to the salaries of the soldiers participating in it.

In the same vein, the European Union is the largest investor in certain sectors of Somalia's state infrastructure, such as judicial reform, food security projects and health infrastructure, amongst others (European Commission, n.d.).

The US and the EU no longer dictate policy in Mogadishu; their involvement focuses on the financial underpinning of the security architecture, aimed at preventing a systemic crisis that could lead to large-scale irregular migration flows.

Somalia has gone from being a failed state to a multipolar chessboard. By 2026, Mogadishu has demonstrated an unexpected mastery in leasing different aspects of its sovereignty to various powers: the skies to Turkey and the US, the land to Egypt, the trade routes to China, and the financial lifeline to the Gulf (Saudi Arabia and Qatar). The EU, for its part, is relegated to the role of regulatory patron, funding the bureaucracy of a stability now enforced by others using far more direct methods. The result is a country which, although mortgaged, is today more difficult to invade or fragment than it was a decade ago

Ethiopia

Ethiopia is the demographic and political heart of the Horn of Africa. It is the second most populous country on the continent (United Nations, n.d.) and the seat of the African Union. With Eritrea's independence in 1993, Ethiopia went from being a coastal power to becoming the world's most populous landlocked country. Its lack of access to the sea defines and shapes much of its aggressive foreign policy, which may also be a manoeuvre aimed at uniting a country riven by deep divisions (Palacián de Inza, 2024).

Whilst it is true that internal difficulties are overshadowed by external ambitions, it is also true that Ethiopia feels encircled: it has Egypt to the north and now Egypt to the south (ten thousand Egyptian soldiers in Somalia). The memorandum of understanding signed with Somaliland is its way of breaking that encirclement⁴. Its lack of a coastline not only 'mediates' its politics, but also its economy, given that 95% of its trade passes through a single point worth between 1.5 and 2 billion dollars annually (Djibouti) (Bereketeab, 2024).

Addis Ababa has shifted from an almost exclusive dependence on the West to becoming, since the year 2000, a theatre of strategic competition where China, Russia and the United Arab Emirates play decisive roles. Its accession to the BRICS in January 2024 and the launch of the Grand Ethiopian Renaissance Dam (GERD) have reaffirmed its ambition for leadership.

To understand this balance of power, it is necessary to analyse the role of the various actors operating on the Ethiopian ground: from China's investment hegemony and India's emerging commercial clout to the vital support of the European Union and the Arab axis.

China

Within this complex web of alliances, the relationship with Beijing represents the deepest and, at the same time, most controversial link in Ethiopia's strategy. China is not merely a trading ally, but a structural—and even existential—partner that has shaped the country's landscape over the past decades.

Ethiopia fell into a massive debt trap with China to build railways and dams. This generated resentment among the Ethiopian population when the projects became unaffordable. It is worth highlighting as a key example that Beijing has built the transmission lines for the Grand Ethiopian Renaissance Dam, meaning it is the entity enabling the energy to reach the cities. That is its true lever of power.

Ethiopia has been designated an 'all-weather strategic partnership' (Xinhua News Agency, 2024) by the Chinese Government. This is not merely diplomatic rhetoric, but

⁴ At the time of writing, 24 February 2026, the Israeli president was beginning an official visit to Ethiopia to strengthen bilateral ties (EFE, 2026b). He may be closer to breaking that siege than might be expected.

the highest level of trust that China bestows upon its closest allies. Very few countries hold this designation.

China's presence in Ethiopia faces a paradox. The Chinese own all the concrete, but they cannot take the money home. Ethiopia suffers from a chronic shortage of foreign currency and its national bank blocks access to foreign exchange.

To avoid losing that money, China is accepting mining concessions as debt repayment (Reuters, 2025). Instead of liquidity, they take lithium and rare earths. Another way to avoid losses is reinvestment in construction. The buildings function as a store of physical value. However, as they need imported materials to complete the works—which are paid for in dollars, and the government does not provide them—, construction comes to a halt, leaving the capital full of unfinished concrete promises. For this reason, the landscape of Addis Ababa is littered with concrete skeletons and idle cranes. Nevertheless, a new player is managing to capitalise on the situation, as will be analysed below.



Figure 4. View of central Addis Abeba. Source: Juan Pedro Hornero

United Arab Emirates

Against this backdrop of paralysis, capital from the United Arab Emirates has taken the reins, having recently made giant strides in its long-standing quest to become a major player in Ethiopia. In early February 2026, they went on the offensive, taking advantage of China's financial 'gridlock' to buy strategic assets at bargain prices. Their strategy is clear: where China provides cement and debt, the United Arab Emirates provides dollars and management.

This aggressive Emirati move is not aimed at financing the Ethiopian state, but at replacing Chinese creditors in key sectors. Abu Dhabi has realised that Addis Ababa's foreign exchange shortage is its best market opportunity, and all the more so because the UAE is not only buying assets but also injecting direct liquidity so that Ethiopia can pay for its basic imports (Enterprise AM, 2024). Despite this, China is not a player of the past: it remains the largest creditor and is the main owner of the infrastructure.

The UAE has launched a strategy of widespread engagement that can be summarised in four further points: infrastructure and logistics financing, political and diplomatic support for Addis Ababa, food security, and technological security.

With regard to infrastructure and logistics, the implementing body is one of the world's largest port management companies. Through Dubai Ports World (DP World), the United Arab Emirates not only manages the port of Berbera but is also financing the construction of the Berbera-Aysha railway (Somaliland, 2025), which will be integrated with the existing line to Addis Ababa.

The UAE *effectively* holds the keys to the sea for Ethiopia (Roca, 2024); the physical key, as we have just seen, but also the diplomatic one. Through the operator DP World, the United Arab Emirates not only controls and modernises the port of Berbera in Somaliland, but, according to Omar Mahmoud of the International Crisis Group (Mohamed, 2026), for Somalia it has been the true guarantor of the controversial memorandum signed in 2024 (Gebu, 2025).

For Addis Ababa, Berbera is not only a logistical alternative to Djibouti (offering advantages in terms of cost [Seid, 2025] and efficiency), but also the culmination of its national ambition to regain access to the Red Sea. The UAE provides a degree of buffer

security against Addis Ababa's fear that the pact with Somaliland will continue to be viewed as a violation of Somalia's sovereignty (Palacián de Inza, 2024).

This is the United Arab Emirates' masterstroke in 2026, given that China relies on the port of Djibouti, but the UAE controls Berbera. By facilitating the pact between Ethiopia and Somaliland so that Addis Ababa has its own access to the sea, the UAE has become the 'indispensable partner' offering Ethiopia what it desires most: to break its geographical isolation.

Emirati influence extends beyond logistics to encompass strategic security. Emirati funds are acquiring vast tracts of fertile land to grow wheat and commodities destined directly for the Gulf. Unlike many Chinese projects, the UAE utilises Ethiopian labour and part of the harvest is allocated to the domestic market, whilst also securing its own consumption.

The UAE has established itself as Ethiopia's defence technology partner (Al Jazeera, 2021), enabling the Ethiopian Air Force to manufacture three hundred drones in just three months (Fortune, 2025). Furthermore, at the African Union summit in February 2026, the UAE announced a USD 1 billion investment in artificial intelligence infrastructure for Africa (Agenzia Nova, 2025), with Ethiopia serving as the logistics hub.

In short, the rise of the UAE has transformed Ethiopia's vulnerability into an opportunity for absolute control. By simultaneously managing the flow of foreign currency, the regime's security and the long-sought access to the Red Sea, Abu Dhabi has gone from being a financial ally to becoming the external manager of the Ethiopian state's viability.

It is not all advantages. Ethiopia is swapping a Chinese debt trap for an Emirati infrastructure trap. If Addis Ababa falls out with Abu Dhabi, not only will it owe money, but it will also physically lose its access to the sea and its food security. Furthermore, even without this happening, its ambitions in Somaliland alone put it in direct rivalry with Egypt.

The UAE's influence and presence in Africa is two-sided: development coexists with land grabbing and accusations of neo-colonialism and human rights abuses (Americans for Democracy & Human Rights in Bahrain, 2024).

USA

For the United States, Ethiopia's stability is a matter of national security (Getachew, 2026) in the Horn of Africa. Despite this, Washington is currently struggling not to be sidelined. Ethiopia's entry into the BRICS broke US financial exclusivity, allowing Addis Ababa to use the New Development Bank to sidestep pressure from the IMF and the World Bank.

This autonomy creates a strategic inconsistency that irritates Congress: the US sends billions in humanitarian aid to a 'partner' that votes with Moscow and Beijing (Everett, 2024).

Under the 2026 National Defence Strategy (NDS), the US has adopted a 'cautious realism'. As Suliman (2026) analyses, Washington no longer acts as a guardian, but as a spectator that delegates internal management to Addis Ababa to prevent the country from collapsing or falling entirely under China's control. This strategic inconsistency allows Addis Ababa to use US aid to sustain itself—it is the African country that receives the most money from USAID (Agbetiloye, 2025)—whilst fully integrating into the BRICS, challenging the hegemony of the dollar.

Turkey

Turkey maintains a strategic relationship with Ethiopia, establishing itself as its second-largest foreign investor after China, with direct investment of around USD 2.5 billion in sectors such as manufacturing and construction (U.S. Department of State, 2025). Ankara acts as a comprehensive partner, as it not only provides funding, but also transfers its industry and military technology (Kemal, 2026).

In the military sphere, Ankara has been a key ally to Abiy Ahmed's Government. The supply of Bayraktar TB2 and Akinci drones was crucial in quelling the insurgency in Tigray. In 2026, this relationship evolved into a Defence Cooperation Pact, which includes training and a steady supply of weaponry.

Regarding infrastructure, the Turkish company Yapı Merkezi led the Awash-Woldia railway project. Ethiopia has divided its railway network among three powers to avoid a monopoly by a single nation: China controls the central corridor to Djibouti, the United

Arab Emirates is funding the future corridor to Berbera, and Turkey controls the northern one (Chen, 2021). This line is key to connecting the northern textile industry with the main network leading to the sea.

Finally, Turkey employs soft power: it funds hospitals and educational centres and restores historic mosques such as Al-Nejashi, thereby connecting with Ethiopia's large Muslim population. This balanced position, coupled with its investments in both countries, allows Turkey to act as a mediator in the Nile conflict (GERD) and in the Ethiopia-Somalia dispute following the memorandum with Somaliland. Ankara seeks stability to protect its economic interests.

EU

The European Union is now a secondary player in Ethiopia. Its influence has shifted from being political to almost purely aid-based. This is due, on the one hand, to the fact that the EU can no longer compete in terms of speed or volume. Whilst the UAE provides USD 3 billion for a railway within months (Abdullahi, 2025), the EU takes years to approve aid packages of USD 600 million, subject to bureaucracy and reforms.

On the other hand, as an actor that demands respect for human rights and accountability in order to release funds, it is not the partner of choice for major strategic projects. Abiy Ahmed prefers the 'non-interference' of the BRICS, of which he is, moreover, already a member, or Emirati pragmatism.

Furthermore, for Addis Ababa, the EU is the entity one turns to for rebuilding clinics and schools after the war, but not for building the country's economic future. It is seen as a sort of giant NGO, not as a powerful partner.

In short, by 2026 the EU will be limited to managing the consequences of instability (migration and hunger) whilst watching from the sidelines as the powers of the Global South (the UAE, Turkey, China and India) divide up the real assets and control of trade routes.

Russia

Russia's influence in Ethiopia has grown following Ethiopia's accession to the BRICS. Its current strategy is based on three disruptive pillars that directly challenge Western influence: it offers civil nuclear technology, weapons and a protective veto in the UN Security Council. In this way, Moscow has positioned itself as the 'guarantor of technological and defence sovereignty' (Dezhina, 2024).

Russia is becoming a sort of bodyguard, offering Ethiopia the tools to become an independent regional power: nuclear energy, attack drones and an alternative financial system to the dollar within the BRICS framework. For Russia, Ethiopia is its gateway to counterbalancing Western power in the Horn of Africa (Samyuktha, 2025).

Examples of Russia's growing influence include the signing of agreements between Ethiopia and Russia to build a Russian-designed nuclear power plant on Ethiopian territory (ROSATOM, 2025), as well as the increase in sales of heavy weaponry (Kyrychevskiy, 2026), fighter jets and, more recently, Su-30 aircraft.

Saudi Arabia

It maintains a silent rivalry with the United Arab Emirates over influence in the country. Riyadh has positioned itself as a key partner in agriculture and food security, seeking to secure supplies for the kingdom via Ethiopian land. In February 2026, both countries launched a business council to boost their bilateral trade, which already exceeds USD 1 billion (Hailegorgis, 2026).

India

New Delhi is a silent giant. Its presence is less noticeable than that of the UAE or China, but much more deeply embedded in the fabric of everyday economic life and in education.

It is Ethiopia's second-largest trading partner and third-largest investor, controlling a large share of private investment in the textile sector and industrial parks. Plastics, agriculture

and the pharmaceutical sector are other areas where New Delhi has a strong presence (Rani Anand, 2025), using both the Indian rupee and the Ethiopian birr for trade.

Furthermore, India also wields soft power through education, being the leading partner in training in Ethiopia, having educated a large proportion of the country's technical and bureaucratic elite.

Addis Ababa uses India to avoid total dependence on China. Delhi, for its part, sees Ethiopia as its gateway to the African market through the African Continental Free Trade Area (AfCFTA) agreement (ICEX, n.d.), using Indian factories in Ethiopia to produce and sell goods tariff-free across the entire continent.

Like the other countries in the Horn of Africa, Ethiopia does not choose one bloc over another, but instead pursues a pragmatic balance by seeking breathing space within a multipolar world: it prioritises the BRICS members to accelerate its structural growth and ensure its defence without interference. At the same time, it maintains the US and the EU as indispensable partners for humanitarian aid and diplomatic balance. In the face of the coldness of Chinese assets⁵, the incursion of Turkey and the UAE is gaining ground by combining security, identity and governance.

Conclusions

The international order in this region has been transformed into a marketplace of transactional interests, where geography is the supreme asset and ideology has no place.

The Horn of Africa has ceased to be a forgotten periphery and has become the epicentre of a new multipolar paradigm. It is the laboratory of a post-Western order. The region is not merely a chessboard on which the great powers play, but a space where African states themselves have learnt to manage external competition to ensure their survival and development.

From the geographical lease of Eritrea to the paradox of stability in Djibouti, each country has devised a strategy that avoids the exclusivity of a single bloc: China is sought for concrete, Russia and Turkey for weapons, and the Gulf monarchies for the lifeblood of

⁵ The author's experience in Ethiopia is that the word 'Chinese' is used as a hate-filled insult directed at Westerners in Addis Ababa.

their petrodollars, food security and control of logistics hubs. The West is relegated to providing humanitarian life support and maintaining diplomatic balance. However, this balancing act is fragile. Overwhelming external debt and the militarisation of the coastline threaten to transform regional autonomy into a form of supervised sovereignty.

The era of closed blocs and exclusive alliances is over. The future belongs to those who know how to manage their ambiguity. The great competitive advantage of powers such as China, Russia or Turkey is clear: offering unconditional sovereignty, filling the void left by the failure of the Western paradigm.

Whilst Western powers retreat in the face of the failure of their rhetoric and regional actors in the Gulf or Turkey adjust their strategies according to the political climate, China stands as the sole actor with a commitment to absolute permanence. In this marketplace of interests, some will come and go in search of expedient agreements, but the region's underlying structure already belongs to those who hold the debt and the concrete, ensuring that, come what may, China will remain.

Ultimately, at the time of writing, the war waged by Israel and the United States against Iran is casting a shadow of systemic uncertainty that threatens to drive up regional logistics costs and erode the profitability of the Horn of Africa—a burden that only major liquidity managers will be able to bear.

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