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Turkey and the Gulf States
in the Horn of Africa:

Fluctuating dynamics of engagement, investment and influence

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Cover image: Ethiopian and Eritrean leaders in Saudi Arabia for peace agreement.
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Executive Summary

Since around 2015, the importance of the Gulf states, particularly Saudi Arabia, the United Arab Emirates (UAE) and Qatar, in the affairs of countries in the Horn of Africa has been growing. At the same time, Turkey, which made a political choice nearly two decades ago to ‘open towards Africa’, has also strengthened its presence in the region. While the Horn of Africa is not the top foreign policy priority for the Gulf states or Turkey, its geographical proximity—part of the Gulf’s ‘near abroad’—means that the region demands consistent attention, particularly from a (maritime) security perspective.

In addition, the Horn of Africa is included within broader strategic agendas, particularly related to investment in long-term food security, tackling the influence of Iran and the development of humanitarian and development sectors. An inconsistent US position in the Middle East over the last decade has created the space—perhaps even the necessity—for such middle powers to assert their influence in the wider Red Sea region.

Gulf state economies also benefit from long-term strategic investments in African food, agriculture, energy and real estate. As a consequence, Riyadh and Abu Dhabi have targeted Ethiopia and Sudan—both of which have great potential as agricultural and energy suppliers—with most investment in the region, although the strategic positioning of the ports in Djibouti has also made it a target for Gulf investment, particularly from the UAE. Ethiopia, the most populous country in the region, and the second largest in Africa, also has a large consumer market that GCC countries are keen to exploit. The (more limited) Qatari investment profile has deeper roots in Sudan, although these relations have been disrupted by the 2019 revolution. While Ethiopia is an increasing priority for Qatar, its investment approach is still in an early, and tentative, phase.

For countries in the Horn of Africa—principally Somalia, Ethiopia, Sudan and Eritrea—the growing involvement of these more powerful, wealthier powers in their economies and foreign relations has offered opportunities, although not without some risks. Relations are clearly asymmetrical, or unbalanced, in nature. While the countries in the Horn are relatively poor, politically volatile and affected by conflict, their partners across the Red Sea are comparatively wealthy, more politically stable and increasingly asserting their positions as proactive middle powers. This has meant that the Gulf states and Turkey have quickly become some of the most important external players in the competitive political marketplace of the Horn, despite no clear individual or collective plan for this to happen.

From the perspective of governments and other political elites in the Horn of Africa, the increased engagement and the resources brought to bear offer the chance to drive domestic (or personal) agendas, and to continue a long history of avoiding capture by those of global powers, such as the US, China or European players. However, while the scale of resources brought to bear by Turkey and the Gulf states in the Horn of Africa

is substantial (relative to the economic strength of the region's states), this does not necessarily correspond to the priority afforded to the region by policymakers in Turkey and the Gulf, or indeed much experience or expertise in the affairs of the region. This means that Gulf and Turkish engagement may be significant, but it is not always effective, and has become instrumentalized by the Horn of Africa's astute and experienced political players for their own ends.

Saudi and Emirati assertiveness

In 2015, when his father acceded to the Saudi throne, Mohamed bin Salman's (MBS) elevation to Deputy Crown Prince and Defence Minister marked the start of a more assertive regional security strategy for the Kingdom of Saudi Arabia (KSA). Principally, this has been driven by the desire to contain Iran—with which the Obama administration was then negotiating a deal (JCPOA) on nuclear issues—amid the continued fallout from the Arab Uprisings. The Saudi turn, supported by the UAE under the consolidated leadership of Crown Prince Mohammed bin Zayed, has precipitated several other major security shifts in the Gulf region. This started with the Saudi and Emirati-led war in Yemen (a response to perceived Iranian backing of the country's Houthi rebels) and the 2017 Gulf states crisis, which between mid-2017 and early 2021 saw Saudi Arabia, the UAE, Egypt and Bahrain seek to isolate Qatar, drawing in Turkey, as well as the states of the Horn of Africa.

While the Horn of Africa's states have only been minor players in these larger regional events, all the states of the region have been put under considerable pressure to choose sides, with uneven effects. For Somalia, Saudi and more significantly Emirati pressure to cut ties with Qatar led to a break in Somalia-UAE relations from early 2018. Abu Dhabi maintains strong relations with Somaliland, and has cultivated influence in Federal Member States, especially Puntland and Jubbaland, seeking to destabilize the FGS.

Ethiopia, on the other hand, is of sufficient size to withstand pressure to take sides, instead adhering to its tendency to maintain relations, leveraging its position as Africa's diplomatic capital. This has happened despite growing ties with Riyadh and Abu Dhabi since Abiy Ahmed came to power as prime minister in 2018, and Saudi-Emirati support for the Eritrea-Ethiopia rapprochement the same year.

Pursuit of maritime security interests has also driven Emirati and Saudi engagement with Eritrea, which has hosted an Emirati military base in Assab used to support operations in Yemen. Eritrea, Sudan, Djibouti and Somalia are also members of the fledgling Council of Arab and African Coastal States of the Red Sea and Gulf of Aden (Red Sea Council), which has shown an early focus on maritime security since its charter was adopted in January 2020 in Saudi Arabia.

Sudan's 2019 transition has created challenges for Saudi, Emirati and Qatari engagement. All three states had functional relations with the former Bashir regime, and Sudan has long been a target for agricultural and (to a much lesser degree) real estate projects from the Gulf. Qatar lost influence and access with Bashir's overthrow, amid pressure

from Egypt, Saudi Arabia and the UAE on various elements within the transitional elite, particularly various security services. The UAE enjoys closer connections to General Hemedti's Rapid Support Forces (RSF), which had joined the Yemen operations, and now wield considerable power in the post-Bashir politico-security landscape.

Turkey and Qatar: alliance of convenience?

The 2017 eruption of the Gulf States crisis reinforced a trend towards cooperation between Turkey and Qatar that had emerged since the Arab Spring, as the two countries found their foreign policy agendas had some resonances and overlapping interests. In the context of the embargo, Turkish support was important for Qatar, while competition between Turkey and the UAE escalated, including in Somalia, Sudan and Libya. Turkey has pursued a broader project focused on cultivating its own economic and political influence since a turn away from Europe in the late 1990s, while Qatar's agenda is more pragmatic and opportunistic than ideological, focused on maintaining its independence from its larger Gulf neighbours, especially Saudi Arabia.

The states of the Horn of Africa, especially Sudan and Somalia, have been affected by the competition. The 2019 revolution in Sudan, in particular, exposed the fragility of Qatar's and to some extent Turkey's position in the competition for influence in the Red Sea. In the last two years, the Horn of Africa has lost strategic weight within the framework of Turkish foreign policy. This deprioritization is due to the policymakers' beliefs that in the context of regional competition (in the wider Middle East and North Africa) there is less gain in the Horn of Africa than in other areas.

Humanitarian and cultural diplomacy, migration and soft power

In terms of soft power, restrictive and sometimes abusive migration policies in the Gulf breed resentment in the Horn of Africa, particularly when these coincide with periodic waves of expulsion and employment nationalism in the Gulf. The Covid-19 epidemic has added strain to this already fraught relationship. The policies in the Gulf also contrast sharply with Turkey's educational and humanitarian engagement, including scholarships and language training. While the proximity of the wealthier economies of the Gulf to the Horn of Africa leads to higher migration rates than Turkey experiences, the difference in Turkey's overall approach benefits Ankara in terms of its accumulation of soft power. Saudi Arabia, the UAE and Qatar are home to sizeable diaspora populations from the Horn of Africa.

The UAE, especially Dubai, has emerged as an increasingly significant player in international humanitarian architecture. Over the past two decades Dubai has sought to position itself as a key player in the global humanitarian system, particularly through the expansion of the International Humanitarian City—the largest humanitarian hub in the world—close to many aid recipients and key financial backers in the UAE. However, Emirati bilateral aid policy increasingly marries military relief and humanitarian intervention. Aid recipients are required to open their markets to state-led investment. Market

expansion is an explicit goal of UAE humanitarianism and return-on-investment is central to state discourses around development assistance, whether this is market access, the establishment of profitable partnerships for future investment or keeping competitors out. Since 2011, Gulf donors have shifted from giving small-scale humanitarian aid to giving large-scale grants designed to stabilize economies and support struggling governments, thus ultimately hoping to prevent further crises.

Cultural diplomacy has become a central asset of Turkish policy in Africa. The involvement of non-state actors, in some cases before the involvement of government, has prepared the ground for the development of political and economic relations. Turkish humanitarian and cultural diplomacy have built up around the civil society–state nexus. A key question raised by the dynamics of the Turkish opening to Africa, especially since 2016 and the post-coup intensification, relates to the degree to which policy towards the Africa is embedded in the ruling Justice and Development Party (AKP), rather than the institutions of the Turkish state. Key players in the Turkey’s Africa engagement increasingly have links to the ruling party (and specifically President Erdoğan). As such, there are questions as to the degree that relations between Turkey and the Horn of Africa will be affected in an eventual post-AKP landscape.

Implications for the Horn of Africa

Shifts in the priorities of the Gulf states over the last five years have had several observable consequences for states in the Horn of Africa. The rapprochement within the Gulf States in early 2021 seems unlikely to result in cooperation between Qatar and the other Gulf States in the short term. Some of the most significant areas of interest are outlined below:

Under the Transitional Government in **Sudan**, there has been an effort to redefine national interests in the Nile and Red Sea, where the elites have historically seen themselves as caught between the competing interests of Egypt and Ethiopia, and more recently the Gulf States. **On the Nile**, in particular, Sudan has taken a more assertive position. The escalation of the border dispute with Ethiopia may signal a tougher stance on negotiations over the Grand Ethiopian Renaissance Dam. However, this may not play into the interests of Egypt. Despite its fragile economic position, multiple factions within the Transitional Government seek to assert Khartoum’s position. This may result in a more astute leverage of competition for influence in Sudan to secure benefits for the country, but also risks instability if different factions compete for external support. The situation presents a quandary for Saudi Arabia and the UAE, which have increased ties with Ethiopia, but retain interests in supporting Egypt’s government. Turkey, and Qatar, appear set to be marginalized in Sudan in the short term.

Somalia’s government is caught up in the latest dynamics of its transition towards a democratic constitutional order. The rapprochement in the Gulf States is unlikely to alter the short-term dynamics of external influence from Turkey and the Gulf States. Turkey’s relations with Mogadishu have weathered two handovers of power, and Ankara is likely

to be hedging its bets to ensure continued influence. Given its commercial, security and humanitarian engagement, as well as cultural linkages, continued access seems likely, regardless of the outcome of the current constitutional stalemate. The split in the Gulf States has Doha retaining influence with President Farmajo's administration in Mogadishu while Abu Dhabi has maintained closer ties with Puntland and Somaliland. Qatar's relations with Farmajo are under strain, in particular over reports that Doha financed the training of Somali fighters in Eritrea. The highly transactional and volatile dynamics of Somali politics have lent themselves to the Gulf States' pattern of engagement. The incoming administration will face the same dynamics.

The conflict in the **Ethiopia's** Tigray region illustrates the degree to which the profile of the Gulf states has risen in Ethiopia. The TPLF and opponents of the government's offensive have claimed that the UAE supported the Ethiopian government with drone attacks on the TPLF. The presence of Emirati military assets at the Eritrean port of Assab lends plausibility to accusations of its involvement, even if Ethiopia denies it. Ethiopian authorities claimed on 3 February 2021 to have disrupted a plot to bomb the Emirati embassy in Addis Ababa, potentially illustrating the risks to the UAE of perceived involvement in Ethiopia's conflict. The UAE (and Saudi Arabia) are further challenged by the escalating border tensions between Sudan and Ethiopia that the Tigray conflict has exacerbated.

Eritrea occupies a difficult position within the Horn's shifting regional dynamics. Since its independence, the country has been exposed to pressure from larger and better resourced neighbours. Currently supporting the Ethiopian government's war in Tigray (officially denied by both governments), Eritrea risks being drawn into a long conflict on its southern border. Asmara managed to navigate the 2017-21 Gulf States rift without severing its ties to Doha, but nevertheless remains caught between larger state agendas in the Nile basin and in the Red Sea. Its main aim is to avoid being overwhelmed by external pressures, key among which must be Ethiopia's continued internal stability, or the intensification of conflict between Ethiopia and Sudan. Turkey and the Gulf States have limited influence with Asmara. Cooperation with the UAE over the Emirati naval base in Assab is the most significant external security engagement.

Policy Considerations

The UK government can use its relationship with, or influence over, countries in the Gulf, and Turkey, to further its own strategic agenda in the Horn of Africa and wider Red Sea region. This includes stabilization, poverty reduction and economic development in all three main countries of focus for this study (Somalia, Sudan and Ethiopia). This kind of multilateral and cooperative approach to issues that cross areas of conventional geographical responsibility will likely be of greater importance post-pandemic in an era of shrinking development spending and a reorienting of UK foreign policy.

Support for cross-regional multilateralism

The wider Red Sea region has historically fallen between the remits of existing multilateral bodies. External engagement with the region has also tended to be siloed between the Horn of Africa, North Africa and the Gulf states. The Red Sea Council which was launched in January 2021 offers an alternative forum for intra-regional engagement.

However, the Council has been slow to move forward since the charter was signed. This is understandable given the challenges created by the Covid-19 pandemic since early 2021, and the attention this has drawn away for the member states. Nevertheless, the pivot in regional relations by the Gulf states in response to the change of administration in the United States suggests that development of the Council may make further progress in the short term. In part, this is dependent on Saudi Arabia and Egypt affording the Council sufficient diplomatic investment, and Saudi Arabia in particular the financial support for the consolidation of the secretariat and the emergence of a common agenda.

For the UK, in seeking to support stabilization in a region which has become significantly more volatile in the past two years (with Sudan's and Ethiopia's transitions, as well as the crisis in Yemen), any progress towards regularization of the Red Sea Council's forum and agenda would be worth encouraging. Engagement with the Red Sea Council on maritime trade and security offers an entry point which could help stimulate movement on agenda building for the Council. Bilateral engagement with Egypt and Saudi Arabia in particular to indicate UK support for the Council, as well as with Sudan, which seeks a higher profile in Red Sea regional affairs, could reinforce this message. However, progress is likely to be slow. Following the lead of regional actors will be essential.

Tackling regional crises

One benefit of a multilateral forum is that it offers the opportunity for dialogue on the sidelines of regularly scheduled meetings—at technical, ministerial and heads of state level. As a corollary to encouraging the emergence and consolidation of the

Red Sea Council and its agenda, Gulf state engagement in two interlinked crises in the Horn of Africa may offer an opportunity to encourage more strategic and sustained, and less transactional, engagement—particularly from Saudi Arabia and the UAE. Both states have developed significant investments in Ethiopia and Sudan in agriculture and other sectors. The UAE in particular has cultivated substantive connections to Abiy’s government in Ethiopia, as well as links to the Transitional Government in Sudan via General Hemedti.

Emirati overtures to defuse tensions between Ethiopia and Sudan over the disputed Fashaga border region have yet to make significant progress. Both governments have indicated that they wish to avoid further conflict. However, de-escalation is proving challenging, in light of the on-going conflict in Ethiopia’s Tigray region along the border. Ethiopia-Sudan relations are also complicated by tensions over the filling schedule of the GERD, which is set to come to a head again when Ethiopia’s rainy season begins in June-July. Saudi and Emirati support for a negotiated settlement to the wider Nile basin crisis could help to resolve the Ethiopia-Sudan border tensions, as well.

Both countries appear to have moved on from their very transactional and disruptive influence during the 2019 revolution, particularly since the UAE encouraged Sudan to join it in normalizing relations with Israel in late 2020. This may offer the UK an opportunity to seek actively to collaborate with Saudi and Emirati diplomatic efforts to encourage a settlement. The key will be Ethiopia’s reluctance to engage in formal mediation, and its preference for an African Union-led framework. The UK could usefully engage with Ethiopia to encourage it to support the development of a negotiation forum that enables constructive input from the Gulf states, which may include positive inducements such as further assistance and investment.

Cooperation in donor relations

The UK is at a challenging point in the trajectory of its engagement as a donor in the Horn of Africa. British aid to the Somali transition has been substantial, and the UK is one of Ethiopia’s largest bilateral donors. However, the UK’s foreign policy and assistance policies are under review and potential reorientation at a time when the region faces significant volatility, putting at risk some of the gains in poverty reduction and stabilization achieved in recent years, particularly in Ethiopia. At the same time, the donor agendas of Turkey and the Gulf states have offered states in the Horn of Africa important assistance and investment. Setting aside questions of donor harmonization, the strategic nature of the Horn of Africa and Red Sea region suggests that external assistance will still flow, and the pattern of states in the Horn successfully leveraging their position to capture and instrumentalize donor assistance will continue.

Although there are questions about the impact of aid flows on the building of institutions, the political transitions underway in Ethiopia (since 2018), Sudan (since 2019) and Somalia (since 2000) also underscore the degree to which a more transactional politics are in some ways already entrenched in the Horn of Africa. The UK could

constructively engage in targeted projects that support processes relevant to its goals, especially poverty reduction and economic development, as well as leveraging strategic investment and assistance from Turkey and the Gulf. The Berbera corridor is a useful example, combining Emirati investment and ‘traditional’ donor support for logistics and process-development (i.e. the Ethiopia-Somaliland trade relationship).

Introduction

This report analyses the impact of the engagement of Saudi Arabia, the United Arab Emirates (UAE), Qatar and Turkey in the Horn of Africa.¹ It also looks at the responses and interests of states in the Horn of Africa region: Sudan, Ethiopia, Somalia and Eritrea. Most of these states are located within the wider Red Sea region, including the Horn of Africa and the Nile Basin, as well as the Arabian Peninsula, which is an increasingly important regional unit for political and economic analysis. The influence of Turkey in this region has also increased substantially over the last decade.

Cultural, economic and political connections across the Red Sea go back centuries. The intensity of regional dynamics has been increasing, however, particularly since the Saudi-led military intervention in Yemen in 2015. For Turkey and the Gulf states, policy towards the Horn of Africa is situated in relation to their broader strategic priorities. Over the past decade, these priorities have been dominated by fallout from the 2008 global economic crisis and the subsequent political crises that have arisen in many parts of the Middle East since the start of the Arab uprisings in 2011. Political shifts in the Horn of Africa have also influenced regional dynamics, the most pronounced of which are the political transitions taking place in Ethiopia and Sudan, and the restoration of relations between Ethiopia and Eritrea since 2018.

From a Gulf states or Turkish perspective, an important factor in regional relations has been evolving US policy towards the Middle East since the Arab Uprisings, and in particular the dynamics of US–Iran relations. For the Arab states in the Gulf, the US posture is an important structural influence, as their security depends fundamentally on US support. In part, this helps define the options available for these middle powers to pursue their national interests, recognizing some of the constraints on their ability to project their security and economic agendas. This is less the case for Turkey, a NATO member-state and much more established military actor which sees itself as a re-emerging power on a par with other European actors (if not the US or China), although the country also faces constraints on its ability to project power. The wider Red Sea region has emerged as an important site of both competition and cooperation between Turkey, the Gulf states and the states in the Horn of Africa. Competition for influence, in particular the Saudi–Iranian rivalry, has also driven the Saudis to push for the development of a new multilateral framework for engagement centred on the region (the Council of Arab and African Coastal States of the Red Sea and Gulf of Aden, or the Red Sea Council). Economic

¹ This report is the result of a combination of field-based and desk research. The research agenda shifted significantly as a result of limits on travel and face-to-face meetings created by the COVID-19 pandemic. The team included researchers based in Khartoum, Addis Ababa, Mogadishu and Istanbul, as well as UK-based researchers. Interviews were conducted between August and October 2020, with some additional research carried out in early 2021 as a result of fast-moving developments in the region.

considerations such as port expansion and trade are also substantive issues, especially for the UAE. This includes most but not all key states in the region.

For the states in the Horn of Africa, increasing engagement from Turkey and the Gulf states has created opportunities but also challenges. This is especially the case for smaller states such as Eritrea, or more fragile ones such as Somalia, and more recently Sudan, which can find themselves caught between competing external agendas that can put their own internal stability at risk. Nevertheless, Turkey and the Gulf states have been a growing source of investment in the Horn of Africa, including in some strategic infrastructure such as ports. The substantial impact of some external influence has fed into perceptions in the Horn of Africa that the region is a higher priority for Turkey and the Gulf states than policymakers in those states describe. As US policy shifts in 2021, this could have an important impact on the scale of Gulf and Turkish engagement in the Horn of Africa, which may catch some actors in the Horn by surprise.

Background: a region in flux

Since 2015, cross-regional dynamics in the wider Red Sea region—especially between the Gulf states and the Horn of Africa—have been intensifying. In 2015, succession in Saudi Arabia allowed Mohammed bin Salman (initially as defence minister and deputy crown prince) to pursue a markedly more assertive regional security strategy. In large part, this was driven by Saudi desires to contain Iran, which looked to benefit from a rapprochement of sorts with the West under the 2015 Joint Comprehensive Plan of Action (JCPOA) over its nuclear programme. Horn of Africa states were directly affected by a number of shifts, including:

- regional security engagement, particularly around the Saudi-led intervention in Yemen, which was the first Saudi-led military intervention in its modern history;
- spillover from the 2017 Gulf states crisis and Gulf interventions in regional diplomacy (for example, between Ethiopia and Eritrea, or between Egypt, Sudan and Ethiopia over Nile waters); and
- political transitions, especially in Ethiopia since 2018, and Sudan since 2019.

The region also has been affected by global factors and increased competition between the Gulf states, Turkey and Iran for influence in the wider Middle East. In particular, this has seen the profile of Saudi Arabia and the United Arab Emirates rise sharply in the Horn of Africa.

Other key fault-lines crisscross the wider Red Sea region. These include tensions over the future of the Nile basin, in light of Ethiopian development of the Grand Ethiopian Renaissance Dam (GERD). Between mid-2017 and early 2021 the Gulf states crisis saw Saudi Arabia, the UAE, Egypt and Bahrain seek to isolate Qatar, drawing in Turkey (the profile of which has been rising in the Horn of Africa for more than a decade) and states in the Horn of Africa. A Turkish–Qatari alliance has subsequently emerged. In partic-

ular, this alliance competes with the UAE and to a lesser degree Saudi Arabia in the region and the eastern Mediterranean (including in Libya), where a number of political transitions and related conflicts are underway a decade after the Arab Uprisings. More recently, a US-driven process has seen the UAE and Sudan (along with Morocco) move to normalize relations with Israel.

Regional blocs, especially the Intergovernmental Authority on Development (IGAD) in the Horn, and the Gulf Cooperation Council (GCC) across the Red Sea—as well as the newly founded Red Sea Council (established in January 2020)—have struggled with internal divisions. The development of a coherent vision for the wider Red Sea region also has been slow. Nevertheless, when functioning even at a minimum level, such blocs are an important locus for dialogue, particularly on the sidelines of regularly scheduled meetings at technical, ministerial and heads of state levels. A key challenge remains, however. None of these blocs include all the key actors on both shores of the Red Sea; importantly, neither Ethiopia nor the UAE – both influential players in the Horn of Africa and wider Red Sea region – are members of the new Red Sea Council.

Moreover, even within alliances or blocs, states that cooperate on one agenda may be at odds on other issues. Saudi–Emirati cooperation has been a key feature since the Arab Uprisings, especially since the ascendance of Mohammed bin Salman in Saudi politics from 2015, starting with the Yemen intervention. At the same time, Saudi and Emirati priorities do diverge. While both states engaged in the Ethiopia–Eritrea rapprochement and in the Sudanese political transition with similar aims, their approaches to the isolation of Qatar and competition with Turkey (or Iran) are not fully aligned. An Emirati policy to counter Turkish influence in the wider Middle East is an emerging feature, about which alignment with Saudi Arabia is not complete. Neither Saudi nor Emirati policy has been able to balance stepping up relations with Ethiopia against their long-standing interests in Egypt (in the context of tensions over the GERD).

The shocks of 2020

During 2020, serious shocks affected many of the countries in the Red Sea region. Most obviously, the global coronavirus pandemic and its knock-on disruption to the global economy, in addition to the local health and economic effects, affected the entire region. Approaches to testing and reporting on the spread of the disease vary widely across countries. This means there is considerable uncertainty as to the prevalence of the disease in the Red Sea region and its impact on public health systems. Although the initial stages of the outbreak appear to have been relatively weak, compared with outbreaks in Europe and North America, the second wave may be more intense.²

2 Simeon Kerr, 'Dubai pays price for festive parties as coronavirus cases surge', *Financial Times*, 29 January 2021, <https://www.ft.com/content/7b6f448f-18d4-4331-986e-439dd76596be>; Ruth Maclean, 'Has Africa been spared? Researchers say the numbers of cases and deaths are probably undercounted', *The New York Times*, 2 January 2021, <https://www.nytimes.com/2021/01/02/world/has-africa-been-spared-researchers-say-the-numbers-of-cases-and-deaths-are-probably-undercounted.html>.

Limited capacity of health systems and different approaches to testing make comparisons and predictions difficult. The economic effects are more visible, however. Similar to previous global financial shocks, this has had important implications for the Horn of Africa and the wider Red Sea region. Both the significant reduction in demand for hydrocarbons and the overproduction as a result of competition between Saudi Arabia and Russia during the first months of 2020 have seen benchmark prices drop from more than USD 60/barrel to below USD 20/barrel in May 2020, before recovering to between USD 40–50/barrel since late June 2020.³ Gulf states hydrocarbon exporters have built up fiscal reserves to weather these fluctuations, although other aspects of the pandemic response are denting revenues—such as the suspension of the annual Hajj and the global downturn in air travel.⁴

For oil importers in the Horn of Africa, the global slowdown produces a mixed impact, lowering fuel costs but potentially denting inward investment, which is an increasingly important dimension of Gulf–Horn relations. As happened in 2008–2009, however, macroeconomic strains may be addressed in part through global support programmes designed as a global response to the economic crisis arising as a result of the pandemic. For example, Ethiopia appears ready to take advantage of a framework announced by the G20 in November 2020 to alleviate debt distress in poor countries in order to facilitate potential restructuring of the public and semi-public debt the country has accrued.⁵ Sudan may also benefit from an increase in donor support: Western and Gulf countries pledged USD 1.8 billion in June 2020 to support the transitional government and Washington has finally removed Sudan from its list of state sponsors of terrorism, which should unblock external investment and open up access to multilateral finance.⁶

Overall, an important consequence of the current economic volatility may be that Turkey and the Gulf states find their budgets under strain—either in terms of investment or humanitarian support—at a time when the countries in the Horn of Africa are particularly vulnerable and their need for support from their Gulf and Turkish allies is rising. While the resources brought to bear (especially by Gulf actors) are substantial from the vantage point of the states in the Horn of Africa, the region is not as high a priority for those states as their Horn counterparts seem to believe.

Economic fragility is compounded by political tensions in Ethiopia, which have complicated its external relations, including with the Gulf states. The ongoing political transition in the country since 2018 was already fraught,⁷ but internal tensions intensified sharply during 2020. Violence spiked in November and December 2020 as conflict broke out between the national government and the regional administration in Tigray, with more

3 WTI benchmark price history, <https://www.hl.co.uk/shares/trading-commodities/wti-crude-oil>.

4 Interview with senior Saudi government official, November 2020.

5 Duncan Miriri, 'Impact of Ethiopia's debt plan on private creditors not yet clear, says adviser', *Reuters*, 2 February 2021, <https://www.reuters.com/article/uk-ethiopia-debt-idUSKBN2A222X>.

6 US removes Sudan from 'state sponsors of terror' list: Embassy', *Al-Jazeera*, 14 December 2020, <https://www.aljazeera.com/news/2020/12/14/us-officially-removes-sudan-from-state-sponsors-of-terrorism-list>.

7 Jason Mosley, 'Ethiopia's Transition: Implications for the Horn of Africa and Red Sea region', *SIPRI Insights on Peace and Security* No. 2020/5, March 2020.

than 55,000 refugees displaced across the border to Sudan.⁸ The ruling political party in Tigray, the Tigray People's Liberation Front (TPLF), which dominated the ruling coalition in Ethiopia from 1991 to 2018, found itself increasingly at odds with the new administration in Addis Ababa. The TPLF was also politically isolated following the dissolution of the Ethiopian People's Revolutionary Democratic Front (EPRDF) and the formation of a single party, the Prosperity Party, comprised of former EPRDF coalition members and allied parties. Most of the TPLF leadership has fled or been killed, and a provisional administration was established for Tigray region on 7 November 2020. The Tigray conflict came amid tensions between the government of Prime Minister Abiy Ahmed Ali and opposition parties in his home region of Oromia. The murder of a popular Oromo signer and activist, Haacaalu Hundeessaa, in June 2020 triggered communal violence, with reports of gangs of Oromo youth looting and killing in Addis Ababa and many other cities and towns across Oromia, as well as a heavy security crackdown. Victims include members of ethnic minorities in Oromia, especially Amhara, and Oromo demonstrators killed by the police.⁹ More than 200 people have been reported killed by the government and more than 1,000 people arrested, including two prominent opposition politicians from Oromia, Jawar Mohammed and Bekele Gerba.

With media and telecommunications access in northern Ethiopia extremely limited, competing narratives about the course of the conflict and current conditions have emerged. The TPLF and other opponents of the government offensive in Tigray claim that the UAE supported the Ethiopian government with drone attacks on TPLF forces and equipment.¹⁰ The presence of Emirati military assets at the Eritrean port of Assab, related to operations in Yemen, lends plausibility to accusations of its involvement, even if the Ethiopian government denies external military involvement and there are significant doubts as to whether such an intervention would be in Abu Dhabi's interests. Nevertheless, the perception of Emirati military involvement may carry its own implications. On 3 February 2021, the Ethiopian government claims to have disrupted a plot to bomb the Emirati embassy in Addis Ababa.¹¹

Tensions in the Nile basin also increased during 2020. Tripartite negotiations over the GERD intensified in early 2020, after the United States and World Bank became involved. Although ostensibly observers, the United States (apparently in response to Egyptian concerns) attempted to broker a deal, pressuring all states to sign in March 2020. Ethiopia resisted and instead worked to shift the focus back to an African Union (AU)-led process, despite pressure from the US administration. In addition, as the United States

8 UN Office for the Coordination of Humanitarian Affairs, 'Sudan Situation Report', 5 January 2021, <https://reports.unocha.org/en/country/sudan/>.

9 'Ethiopian forces killed scores in June-July unrest, report says', *DW*, 1 January 2021, <https://www.dw.com/en/ethiopian-forces-killed-scores-in-june-july-unrest-report-says/a-56110962>.

10 Wim Zwijnenberg, 'Are Emirati Armed Drones Supporting Ethiopia from an Eritrean Air Base?', *Bellingcat*, 19 November 2020, <https://www.bellingcat.com/news/rest-of-world/2020/11/19/are-emirati-armed-drones-supporting-ethiopia-from-an-eritrean-air-base/>.

11 'Ethiopia Foils Terrorist Attack Plot On UAE Embassy In Addis Ababa', *Fana Broadcast Corporation*, 3 February 2021, <https://www.fanabc.com/english/ethiopia-foils-terrorist-attack-plot-on-uae-embassy-in-addis-ababa/>.

worked to remove Sudan from its list of state sponsors of terror, the transitional government in Khartoum came under pressure from Washington to normalize relations with Israel as a precondition for removal, which it eventually agreed to do. During a late October 2020 call between the US president, the Israeli prime minister and the Sudanese prime minister to celebrate the normalization, the US president criticized Ethiopia for not signing the March 2020 agreement on the Nile and suggested that Egypt would bomb the GERD.¹² Moreover, in the wake of the Tigray crisis, a frozen border conflict along the Sudanese–Ethiopian frontier re-activated in late 2020 and early 2021. The tripartite dialogue under AU auspices has not made significant progress and relations between Ethiopia, Sudan and Egypt are at a low.

Conflict in Ethiopia adds to an already challenging environment for external engagement from the Saudi and Emirati governments. Both countries have strong relations with the Egyptian government and have emerged as influential in the Sudanese transition, particularly with the security services. Despite closer relations with Addis Ababa since 2018, it does not appear that Riyadh or Abu Dhabi are in a position to facilitate dialogue between Ethiopia and Sudan over the cross-border conflict or between the three countries over development and filling of the GERD.

Nevertheless, the US election result in late 2020 appears to have produced one potential improvement in regional dynamics: In anticipation of the change of US administration, Saudi Arabia has moved to repair relations with Qatar. Egypt, the UAE and Bahrain followed suit in early 2021. The ending of the embargo on Qatar is an important shift in a set of divisions that have underpinned regional dynamics since 2017.

Evolving connections in the Red Sea regional context

The countries of the Horn of Africa comprise the African flank of a zone of increasing regional connection but also of competing visions and interests. As these dynamics have intensified, the states in the Horn of Africa have increasingly been drawn into the orbit of the Gulf states and of Turkey.

Links from the Horn of Africa across the Red Sea, and beyond to the Middle East, are long-standing, stretching into antiquity.¹³ Modern connectivity has waxed and waned. Connectivity intensified with the building of the Suez Canal and subsequent British colonial activity in the area. By the late nineteenth century, the wider region was brought under the hegemony of a single imperial regime. Connectivity waned in the second half of the twentieth century as postcolonial states pursued new alignments.¹⁴ Miran's 2009 monograph on Massawa, Eritrea illustrates the overlapping networks of social,

12 For a video recording of the relevant portion of the conference call, see: <https://twitter.com/i/status/1319764568164454400> (accessed 15 March 2021).

13 Jonathan Miran, *Red Sea Citizens: Cosmopolitan Society and Cultural Change in Massawa*, Bloomington and Indianapolis: Indiana University Press, 2009.

14 Harry Verhoeven, 'The Gulf and the Horn: Changing Geographies of Security Interdependence and Competing Visions of Regional Order', *Civil Wars* 20/3 (2018).

economic and religious connectivity crossing the wider Red Sea region.¹⁵ From the nineteenth century, expanding Egyptian influence (including influential Sufi brotherhoods) in competition with the Ottoman empire and emerging European colonialism, reinforced the pattern of such networks.¹⁶ Recent research has increasingly engaged with the connections across the region, although often through the lens of maritime security, regional stability or migration.¹⁷

The global economic crisis of 2008, and the election of US president Barack Obama, who took office in January 2009, set the stage for important shifts in some of the geostrategic conditions within which governments in the Middle East and Horn of Africa have pursued alliances and developed their regional agendas. Importantly, the Obama administration (and subsequently the Trump administration) sought to disentangle the United States from some of the entrenched positions in the Middle East that had been built up in previous decades, but particularly since the Bush administration invasion of Iraq in 2003.¹⁸ From a regional perspective, this had two important impacts. First, when the economic downturn provided the spark for popular protests across the Middle East from late 2010, the Obama administration proved willing to engage with the Muslim Brotherhood, which leveraged the protest movement in Egypt that brought down Presi-

15 Miran, *Red Sea Citizens*.

16 Joseph Venosa, 'Adapting to the new path: Khatmiyya Sufi authority, the al-Mirghani family, and Eritrean nationalism during British Occupation, 1941–1949', *Journal of Eastern African Studies* 7/3(2013), 413–431.

17 For example, see: International Crisis Group, 'Intra-Gulf Competition in Africa's Horn: Lessening the Impact', Middle East Report No 206, Brussels/Nairobi: International Crisis Group, 2019; International Crisis Group, 'Somalia and the Gulf Crisis', Africa Report No 260, Brussels/Nairobi: International Crisis Group, 2018a; International Crisis Group, 'The United Arab Emirates in the Horn of Africa', Middle East Briefing No 65, Brussels/Nairobi: International Crisis Group, 2018b; Mahmood, Omar S. 'Competition, cooperation and security in the Red Sea'. East Africa Report 24. Pretoria: Institute for Security Studies, August 2019; N. Melvin, 'The new external security politics of the Horn of Africa region', *SIPRI Insights on Peace and Security*, April 2019; Zach Vertin, 'Red Sea Rivalries: The Gulf states are Playing a Dangerous Game in the Horn of Africa', Snapshot, ForeignAffairs.com blog, 15 January, 2019, <https://www.foreignaffairs.com/articles/east-africa/2019-01-15/red-sea-rivalries>; Zach Vertin, 'Red Sea Geopolitics: Six Plotlines to Watch', Lawfare Institute, 2019b, <https://www.lawfareblog.com/red-sea-geopolitics-six-plotlines-watch>; Awol Allo, 'Ethiopia: Exploiting the Gulf's scramble for the Horn of Africa', *African Arguments*, 13 August 2018, <http://africanarguments.org/2018/08/13/ethiopia-exploiting-gulf-scramble-horn-africa/>; Berouk Mesfin, 'Qatar's diplomatic incursions into the Horn of Africa', East Africa Report, Issue 8, Institute for Security Studies, Pretoria: Institute for Security Studies, November 2016; Lidet Shiferaw, 'The role of Gulf states in peace and security and development in Sub-Saharan Africa', IAI Working Papers 16, Rome: Istituto Afari Internazionale, 2016; Federico Donelli and Giuseppe Dentice, 'Fluctuating Saudi and Emirati Alignment Behaviours in the Horn of Africa', *The International Spectator* 55/1 (2020): 126–142; Federico Donelli, 'Determinants of Middle East states involvement in the Horn of Africa', in *Africa and the Middle East: Beyond the Divides*, POMEPS Studies 40, 50–53, Washington, DC and New York: Project on Middle East Political Science, George Washington University and School of International and Public Affairs, Columbia University, June 2020. Neil Melvin, 'The foreign military presence in the Horn of Africa region', SIPRI Background Paper, Stockholm: Stockholm International Peace Research Institute, April 2019b; David Styan, 'The politics of ports in the Horn: War, peace and Red Sea rivalries', *African Arguments*, 18 July 2018, <http://africanarguments.org/2018/07/18/politics-ports-horn-war-peace-red-sea-rivalries/>. Nisar Majid and Khalif Abdurahman, 'Mobility, Trust and Exchange: Somalia and Yemen's Cross-border Maritime Economy', London: Rift Valley Institute, 2019; Jatin Dua, Abdideeq Warsame and Ahmed Shire, 'Bosaso and the Gulf of Aden: Changing dynamics of a land–sea network', London: Rift Valley Institute, 2020, <http://riftvalley.net/publication/bosaso-and-gulf-aden-changing-dynamics-land-sea-network>.

18 Barack Obama, 'A New Beginning', speech delivered in Cairo, Egypt, 4 June 2009, <https://obamawhitehouse.archives.gov/issues/foreign-policy/presidents-speech-cairo-a-new-beginning>.

dent Hosni Mubarak and led to the election of President Mohamed Morsi in 2012. Crises in Tunisia, Egypt, Tunisia, Yemen, Libya and Syria were viewed with alarm in most of the authoritarian Gulf monarchies, leading to tensions between Saudi Arabia and the UAE on the one hand, and Qatar on the other, over how to respond.¹⁹ The Saudis and Emiratis supported the 2013 coup against the Morsi government and subsequently sought to curb Qatari (and Turkish) influence in the region, wherever post-Arab Uprising instability is still playing out, including in Syria, Libya and Yemen.²⁰

Second, US policy under the Obama administration shifted to pursue rapprochement with Iran as part of a strategy to constrain the Iranian nuclear programme. For Saudi Arabia in particular, this presented a significant challenge. A long-standing pillar of the Saudi security strategy—cooperation with the United States on security and mutual containment of Iran—was cast into doubt. Although the Trump administration shifted away from engagement with Iran, indications suggest that the Biden administration may revive the approach. Saudi leadership regards Iran as a regional rival and a strategic threat.²¹ The perceived threat of a resurgent Iran, as well as the pursuit of national interest amid the volatile post-2011 landscape, presented key challenges for Gulf leadership. The 2013 intervention in Egypt marked a significant step in the evolution of a more assertive security strategy in the region—not only the Middle East and North Africa but also across the Red Sea in the Horn of Africa.

This shift also reflected generational and personality changes in the leadership of Saudi Arabia and the UAE. By 2014, Crown Prince Mohammed bin Zayed had increasingly consolidated his authority (and that of Abu Dhabi) within the UAE, after the relative position of Dubai was weakened by the 2008 global crisis. The death of the ruler of Ras al-Khaimah (RAK), Sheikh Saqr bin Mohammad al-Qasimi, in late 2010 altered the relatively tolerant posture of that emirate towards the Islamist movement Al-Islah. In 2014, the president of the UAE, Khalifa bin Zayed (brother of Mohammed) suffered a stroke and left Mohammed as de facto ruler. In January 2015 in Saudi Arabia, following the death of King Abdullah, Mohammed bin Salman emerged as the key driver of Saudi foreign and security policy—first as deputy crown prince and defence minister, and subsequently as crown prince.²²

During the past decade, Turkish re-engagement in the Horn of Africa and wider Red Sea region has intensified as part of a more assertive foreign policy under the Justice and Development Party (*Adalet ve Kalkınma Partisi*, or the AKP). Since 2003, the AKP has been led by Recep Tayyip Erdoğan, first as prime minister, and then since 2014, as president. The push of Turkey into Africa dates back to the mid-1990s but its engagement

19 Kristian Ulrichsen, 'Perceptions and Divisions in Security and Defense Structures in Arab Gulf States', in *Divided Gulf: Anatomy of a Crisis*, ed. A Kreig (ed), Singapore: Palgrave Macmillan, 2019.

20 Christopher Davidson, 'The UAE, Qatar, and the Question of Political Islam', in *Divided Gulf: Anatomy of a Crisis*, ed. A Kreig, Singapore: Palgrave Macmillan, 2019.

21 Indeed, the formation of the Gulf Cooperation Council (GCC) in 1981 was in large part a response to the Iranian Revolution and subsequent conflict between Iran and Iraq. For example, see: Ulrichsen, 'Perceptions and Divisions'.

22 Ulrichsen, 'Perceptions and Divisions'.

in the Horn of Africa has picked up considerably since its humanitarian intervention in Somalia during the 2011 famine.²³

Sometimes referred to as ‘neo-Ottomanism’, Turkish foreign policy in the wider Red Sea region has been underpinned by two main pillars. These are securing commercial interests and cementing the position of Turkey as a security influencer in the Mediterranean and wider Red Sea regions.²⁴ Turkey was an early adopter of a regional approach to the Horn of Africa, opening embassies in every country in the region.²⁵ As a party with Islamist roots, the AKP is seen by the Gulf monarchies (especially Saudi Arabia and the UAE) as having supported Muslim Brotherhood-affiliated movements during the Arab Uprising.²⁶ Following a 2016 coup attempt, and subsequent entrenchment of Erdoğan’s presidential position through a constitutional referendum in 2017, Turkish security interventions have intensified, including in Libya and Syria, positioning the country at further odds with the Saudis and Emiratis.

Turkey also supported Qatar amid the embargo imposed by Saudi Arabia, the UAE, Egypt and Bahrain from 2017 until early 2021. In the Horn of Africa (and globally), an important third agenda has been added to Turkish engagement; namely, the elimination of business and educational projects linked to the Gülenist movement alleged to be behind the 2016 coup attempt.²⁷ This has led to an intensification in cultural diplomacy, including investment in education in the region and scholarship programmes. Turkey, Qatar, Saudi Arabia, the UAE and to some extent Egypt are all cultivating influence and commercial and security interests on the African shores of the wider Red Sea region.

In addition to the US agenda, an increasingly important geostrategic consideration is the commercial and security presence of China in the Red Sea region and western Indian Ocean. Since 2013, much of this engagement has come under the rubric of the Belt and Road Initiative (BRI). There is a long history of China–Gulf relations, which have deepened with intensifying Chinese investment since the BRI was announced.²⁸ This has created opportunities for collaboration. At the same time, economic competition has

23 Federico Donelli, *Turkey in Africa: Turkey’s Strategic Involvement in Sub-Saharan Africa*, London: IB Tauris, 2021: 83–84.

24 Federico Donelli, ‘The Ankara consensus: the significance of Turkey’s engagement in sub-Saharan Africa’, *Global Change, Peace & Security* 30/1 (2018); Willem van den Berg and Joseph Meester, ‘Turkey in the Horn of Africa: Between the Ankara Consensus and the Gulf Crisis’, CRU Policy Brief, The Hague: Clingendael Institute, May 2019, https://www.clingendael.org/sites/default/files/2019-05/PB_Turkey_in_the_Horn_of_Africa_May_2019.pdf.

25 M Özkan and S Orakçi, ‘Viewpoint: Turkey as a “political” actor in Africa – an assessment of Turkish involvement in Somalia’, *Journal of Eastern African Studies* 9/2 (2015).

26 The hereditary monarchies of the Gulf States have long been sceptical of the Egyptian Muslim Brotherhood and its international affiliates, although this stance has hardened significantly since the Arab Uprisings and in particular the Egyptian revolution. For example, see: Davidson, ‘Question of Political Islam’.

27 Educational projects in Africa connected to the global charitable network of Fetullah Gülen date back to the mid-1990s. There is a proselytizing dynamic to network projects, although Gülen’s name does not normally appear on them. An early ally of Erdoğan’s AKP government, the Gülenist movement publicly broke with the AKP in 2013. Gülen, who has lived in the United States since 1999, was stripped of his Turkish citizenship in 2017, following the 2016 coup attempt in Turkey. For example, see: Federico Donelli, ‘The Gülen Movement in Africa: From Turkish Transnational Asset to Anti-State Lobby’, *Israel Journal of Foreign Affairs* 13/1 (2019).

28 Jonathan Fulton, ‘China-UAE Relations in the Belt and Road Era’, *Journal of Arabian Studies* 9/2(2019).

become sharper. This is particularly visible in Djibouti, where the Emirati firm Dubai Ports World (DP World) has lost out to Chinese companies in the port sector. Chinese engagement in maritime security has also contributed to competition with the Gulf states and Turkey (and global naval powers) in the context of counter-piracy operations, with Djibouti again proving an important locus where such competition plays out, and providing the Djiboutian government with opportunities to advance its own interests.²⁹

Towards a Red Sea Council

Since 2018, the push to develop a new regional bloc, centred on the Red Sea and the Gulf of Aden, which connects it to the western Indian Ocean, has taken shape in this dynamic and complex context. Given the competing visions and rivalries described above, the artificial division created by the Red Sea into African and Middle East geographies has proven to be a stumbling block for the promotion of regional cooperation and dialogue. As such, the January 2020 summit in Riyadh to launch the charter for the Council of Arab and African Coastal States of the Red Sea and Gulf of Aden (or Red Sea Council)—comprised of Egypt, Sudan, Eritrea, Djibouti, Somalia, Yemen and Saudi Arabia—marks an important departure. The bloc (however nascent) offers a potentially significant platform for cross-regional diplomacy and cooperation, although it faces significant challenges.

Discussions with potential members of the Red Sea Council were initiated by Saudi Arabia in late 2018.³⁰ According to Ahmed Kattan, Saudi minister of state for African countries, ‘Saudi Arabia was the first to realize the importance of the Red Sea and the first to initiate a call for international collective efforts aimed at coordination to protect and secure the safety of the waterway.’³¹ The initial aim of the organization is strengthening economic, environmental, and most importantly, security cooperation, especially on piracy, smuggling and immigration.³²

Until the Red Sea Council was established, none of the multilateral bodies that included the major states in the wider Red Sea region—most significantly, the Arab League and the Organisation of the Islamic Conference—had a clear focus on a shared agenda for

29 Zach Vertin, ‘Great Power Rivalry in the Red Sea: China’s Experiment in Djibouti and Implications for the United States’, Brookings Doha Center/Global China, Washington, DC: Brookings Institute, June 2020. <https://www.brookings.edu/research/great-power-rivalry-in-the-red-sea/>

30 Nonetheless, the initiative has earlier roots. Before 2018, it was mainly driven by Egypt but with limited progress due to tensions with upstream neighbours in the Nile basin.

31 Saleh Al-Zayed, ‘Kattan: ‘Council of the Red Sea and Gulf of Aden’ Is Strategic Necessity’, *Asharq Al-Awsat*, 9 January 2020, <https://english.aawsat.com/home/article/2074231/kattan-council-red-sea-and-gulf-aden-strategic-necessity>.

32 Abdelaziz Aluwaisheg, ‘Council of Red Sea and Gulf of Aden to Play Critical Role’, *Arab News*, 13 January 2020, <https://arab.news/6uzf2>; [Saudi Arabia: Signing the Charter of the Arab and African States Bordering the Red Sea and the Gulf of Aden], *CNN Arabic*, 6 January 2020, <https://arabic.cnn.com/middle-east/article/2020/01/06/saudi-arabic-arab-and-african-council-red-sea-and-gulf-aden>; Ahmed Ahtef, ‘«تتطامن الدول لودل الفلاحات».. «يديدج عرد»». [The Alliance of the Eight Littoral States...An Iron Shield to Secure the Red Sea], *Al-Etihad*, 11 January 2020, <https://www.alittihad.ae/article/1901/2020/«تتطامن-الدول-ل-الودل-الفلاحات»-«يديدج-عرد»>.

this region. Rather, most multilateral initiatives reinforce artificial distinctions between the Middle East and Africa. Further, multilateralism has taken different courses in Africa and the Middle East, with African regional bodies more actively engaged in diplomatic cooperation than their Middle Eastern counterparts.

With the COVID-19 pandemic contributing to the delayed set up of the council, the structure and function of the organization currently remains unclear. As a Saudi diplomat posits, 'The Red Sea Council has stalled with COVID but the plan is that it will serve as a major platform for developing political, economic, cultural and security ties, including maritime issues and criminality and migration issues.'³³ While it is a critical multilateral initiative illustrative of transregional strategic engagements, the added-value of the Red Sea Council should be judged against the possibilities for cooperation that it offers, as well as the capacity of members to deal efficiently and effectively with regional issues.

Council leadership is a source of tension for the larger member states. While Saudi Arabia and Egypt both floated the idea of this council back in 2018, Riyadh has been the main driving force behind its realization. The kingdom presumably seeks to organize Red Sea affairs under its umbrella.³⁴ As such, there is a fear (especially in Cairo) that Saudi Arabia will use the council as a tool to serve its own foreign policy concerns; namely, against Iran,³⁵ whose profile in the Red Sea has risen as the conflict in Yemen has intensified since the Saudi-led intervention in 2015. Described as a Saudi political initiative, it is useful to point out some initial discrepancies between the two countries over the nature of the organization: Cairo seemingly called for a decentralized body, the work of which should focus on a wide range of topics; meanwhile, Riyadh enforced a centralized and security-focused approach.³⁶ Reflecting willingness to enhance cooperation under its aegis, in 2018 and 2019, Riyadh organized extensive joint naval exercises in the Red Sea (Red Wave 1 and 2) including almost all the maritime states, with the exception of Israel and Eritrea.³⁷

In contrast, pushing back against Iranian influence (and attempts to influence) is not a major concern for Horn of Africa countries. Nonetheless, Sudan, Somalia and Djibouti closed their embassies in Tehran in support of Saudi Arabia when it severed diplomatic ties with the Islamic republic in January 2016. In 2015, these countries joined the Mohammed bin Salman-led Saudi Islamic Military Counter-Terrorism Coalition (IMCTC), which many also perceived as a tool to push back against Iranian influence. According to some observers, the council also targets Turkey.³⁸ In spite of apparent unity in the

33 Interview with Saudi diplomat, 31 August, 2020.

34 Interview with Gulf expert, 14 August 2020.

35 Gerald M Feierstein, 'The Impact of Middle East Regional Competition on Security and Stability in the Horn of Africa', policy paper, Washington: Middle East Institute, 18 August 2020, 2.

36 Interview with Camille Lons, 26 August 2020.

37 'Saudi Naval Forces Prepare for Red Wave 1', *Arab News*, 27 December 2018, 1, <https://www.arabnews.com/node/1426781/saudi-arabia>; Dorian Archus, 'Seven Red Sea Countries Attend Red Wave-2 Exercise Hosted by Saudi Arabia', *Naval News* (blog), 22 September 2019, <https://navalnews.net/seven-red-sea-countries-attend-red-wave-2-exercise-hosted-by-saudi-arabia/>.

38 Interview with Gulf expert, 12 August 2020.

council, some member states are concerned about the increasing institutionalization of the Saudi political and security regional network, the objective of which would be to establish kingdom hegemony over the region. These divergent concerns risk weakening unity as ‘all littoral states need to share the same threat perceptions, which they [the council] do not’.³⁹ These fears and differences could further curb the overall cooperation level between council members, which would curb their capacity for action.

Despite growing interest in the Red Sea region, a Saudi commercial attaché sums up the situation this way:

Mohammed bin Salman’s political and economic focus since he became crown prince [and formerly as deputy crown prince] has largely been on traditional partners with the US at the top of the hierarchy (like never before), followed by European members [UK, France] and then strategic cooperation with Russia and China (especially economically). ... But finally, the main threat for Saudi Arabia is Iran and dealing with Yemen. MbS also knows that the biggest threat of all is a lack of economic progress and, more specifically, job creation for Saudi nationals. ... If the Red Sea developments can support the latter, then a council, a platform, may be useful.⁴⁰

With the current twin fiscal pressures in Saudi Arabia (lower oil prices and COVID-19), fiscal prioritization may direct political support and economic efforts towards consolidation, possibly at the expense of Horn of Africa directed efforts and interests. From a military expenditure perspective, one observer predicts that ‘military spending will grow as a proportion of the budget ... and mega projects are likely to continue on as a result of the “personalized” policymaking in the kingdom’.⁴¹

The official Eritrean posture captures some of the challenges the council poses for the Horn of Africa states—Sudan, Eritrea, Djibouti and Somalia—in navigating a bloc that includes richer states with the potential to dominate its agenda.⁴² A key priority for Eritrea is ensuring that the principle of subsidiarity is written into the new mandate of the Red Sea Council, whereby member states only seek to involve external actors in regional security issues when they lack the collective capacity to deal with such issues internally.⁴³ The transitional government in Sudan comprises a variety of different interests but there are a number of voices calling for Sudan to take a more assertive position in pursuing its interests in the Red Sea, given its strategic location.⁴⁴ A Red Sea commission was announced by the transitional government in 2020, to develop Sudanese policy options, but details have not yet emerged. The Somali position is complicated. Although the federal government in Mogadishu represents the country in the new council, 85 per

39 Interview with two Gulf experts, 23 August 2020.

40 Interview with a Saudi commercial attaché, 2 September 2020.

41 Interview with Kristian Ulrichsen, academic, 11 August 2020.

42 Mosley, ‘Ethiopia’s Transition’, 25-28.

43 Interview with Eritrean official, January 2021; interview with Eritrean foreign policy expert, January 2021.

44 Anonymous sources of the Sudan researcher.

cent of the its Gulf of Aden coastline falls under the control of the de facto independent Somaliland government in Hargeisa.

The interests of the broader Horn of Africa will be represented by the IGAD Task Force on the Red Sea and the Gulf of Aden, although divisions remain within IGAD and Eritrea has not resumed its participation in the organization.

Challenges for the fledgling council

Internal rivalries are a key challenge for the new Red Sea Council. Moreover, some key non-littoral players need not rely on the council to engage in the region, as they deal on bilateral and trilateral levels with state-level actors. A prime example lies in the flourishing UAE–Somaliland partnership. Somaliland has provided the Emirates with major assets on the Gulf of Aden over the last five years. As a security adviser to the UAE government notes, ‘The Horn is a natural sphere of influence. It does not matter whether the UAE is a *de jure* littoral Red Sea state. Investments, people–people exchanges, diaspora, aid and security are the drivers of our relationship.’⁴⁵ Another observer echoes this perspective, indicating that being part of the council would not bring much additional benefit to the UAE regional positioning.⁴⁶

Significantly, Abu Dhabi holds stakes in southern Yemen via its Southern Transition Council allies, who control the key city of Aden.⁴⁷ The importance of UAE anti-ISIS–Al-Qaeda activities in Yemen provides the country with a key ring of ports and strategic sites on the Gulf of Aden;⁴⁸ namely Shihir, Mukalla and Mokha; and Socotra⁴⁹ and the Perim Islands. Similarly, other commentators observe that Abu Dhabi has a critical interest in the Yemeni coastline rather than the hinterland.⁵⁰

Another key issue is that Ethiopia—with a population of more than 100 million people—is not part of the council. Without access to the Red Sea since Eritrean independence in 1991, Ethiopia is nonetheless still a major player, the absence of which risks undermining council effectiveness. In 2019, Alexander Rondos, EU special representative to the Horn of Africa, claimed:

45 Interview with a security adviser to the UAE government, 25 August 2020.

46 Interview with Camille Lons, 26 August 2020.

47 Eleonora Ardemagni, ‘Rebuilding Yemen’s Maritime Forces Hobbled by Internal and External Rivalries’, Washington: Arab Gulf States Institute, 6 August 2020, <https://agsiw.org/rebuilding-yemens-maritime-forces-hobbled-by-internal-and-external-rivalries/>.

48 Interview with Kristin Diwan, 14 August 2020.

49 Some media outlets have accused the UAE and Israel of developing plans to install joint intelligence and military facilities on Socotra. For example, see: Lukman Abdullah, ‘يُتارام إلام عي ببطت لال «رامث» ي لوأ... يرطقس’, [Socotra: First Fruit of Emirati Normalisation], *Al-Akhbar*, 5 September 2020, <https://al-akhbar.com/Yemen/293477>; Zain Khalil, ‘مجد ألال رحبال اب يركس ع نواع تل دهم ي تارام إلام عي ببطت: قيلي ئارسا إة قئي ثو’, [Israeli Document: Emirati Normalisation Paves Way for Military Cooperation in the Red Sea], *Anadolu Arabic*, 18 August 2020, <https://www.aa.com.tr/ar/1945000/رمجال-رحبال-اب-يركس-ع-نواع-تل-دهم-ي-تارام-إلام-ع-ي-ب-ب-ط-ت-ة-ق-ي-ث-و-ة-ق-ي-ر-ع-ل-ل-و-د-ل>.

50 Interview with John Jenkins, 24 August 2020.

The discussion [about a Red Sea forum] focuses on bringing together the littoral states. Ethiopia has interestingly reminded people that it is merely 60 miles from the Red Sea. ... There is a huge stake there and it would be wise for all those who are designing this Red Sea arrangement to remember that fact. That's a reality. You never want to drive a country to mug one with its realities when it feels driven to do so.⁵¹

Abdul Mohammed, chief of staff and senior political adviser of the AU High Level Implementation Panel for Sudan and South Sudan, recently stressed the need for the council to be inclusive in getting Ethiopia involved, one way or another.⁵² Ethiopia's absence is generally attributed to Egypt's sensitivities. The two countries are still divided over the GERD. Ethiopia—with its demographic (and increasingly its security and economic) stature—would also significantly reduce the political weight of Cairo in the organization. Finally, the absence of Somaliland is another challenge. With nearly 800 km of coastline along the Gulf of Aden, its absence from the council risks further hampering the work of this new Afro–Arab bloc. Somaliland membership, however, would be unacceptable in Mogadishu.

51 Brookings Institution, *Red Sea Rivalries: The Gulf, the Horn, and the New Geopolitics of the Red Sea*, Youtube, 2019, <https://www.youtube.com/watch?v=uDADZxk8Xd8&t=2852s>.

52 The Arab Gulf States Institute in Washington, *Competition or Cooperation: The Horn of Africa and Broader Red Sea Basin at a Crossroads*, 2020. <https://www.youtube.com/watch?v=B74wfTmyLHs>

Turkey and Qatar: Overlapping agendas in the Horn of Africa

The influence of Turkey and Qatar are considered here in parallel, both because their interests and agendas have overlapped to some degree (resulting in some instances of cooperation, if not always coordination) and because they have sought to pursue more overtly political agendas in the Horn of Africa than the other Gulf states. From 2011 onward, both countries have found their interests increasingly aligned as the changes initiated by the Arab Uprising have swept through the region. The 2017 rift between Doha and the other regional Arab powers (Egypt, Saudi Arabia and the UAE) have served to reinforce Turkey–Qatar connections. The degree to which support for political Islam underpins the foreign policy of either country is overstated, however, even if this is the core accusation that drove the split in 2017.

Turkey has pursued a broader project focused on cultivating its own economic and political influence since a turn away from Europe in the late 1990s. The Qatari agenda is more pragmatic and opportunistic than ideological, focused in part on maintaining independence from larger Gulf neighbours, especially Saudi Arabia. The states of the Horn of Africa, especially Sudan and Somalia, have been affected by the competition between Qatar and other Gulf states. In particular, the 2019 revolution in Sudan exposed the fragility of the Qatari position (and to some extent the Turkish position) in the competition for influence in the Red Sea.

Turkish opening towards Africa

Turkish involvement in the Horn of Africa has intensified substantially in the last decade. Most of the existing literature analysing this development considers the Turkish approach to Africa in terms of individual dimensions, or drivers, of foreign policy decisions—economic,⁵³

53 Mehmet Özkan, 'A New Actor or Passer-By? The Political Economy of Turkey's Engagement with Africa', *Journal of Balkan and Near Eastern Studies* 14/1 (2012); Numan Hazar, 'Turkey's Policy of Outreach to Africa: An Assessment', *Journal of Business Economics and Political Science* 4/7 (2015); Brendon J Cannon, 'Turkey in Africa: Lessons in Political Economy', *Florya Chronicles of Political Economy* 3/1 (2017); Abdulkadir Wahab Aman and Zeynep Kaplan, 'The distribution and determinants of Turkey's FDI positions in Africa', *Turkish Economic Review* 4/4 (2017); Emel Parlar Dal, Ali Murat Kursun and Hakan Mehmetcik, 'Assessing the Role of Trade in the Formation of Turkey's Civilian Power in Africa', *Perceptions—Journal of International Affairs* 23/1 (2018); Emel Parlar Dal and Samiratou Dipama, 'Assessing the Turkish 'Trading State' in Sub-Saharan Africa', *Turkey's Political Economy in the 21st Century*, ed. Emel Parlar Dal, Cham: Palgrave Macmillan, 2018.

humanitarian⁵⁴ and security- related⁵⁵ factors. The literature rarely views the Turkish approach to the Horn of Africa as part of its broader regional agenda for the Middle East and North Africa, which connects it more clearly to critical events for the economic prosperity and security of the country.

Although the AKP government announced the Year of Africa in 2005, the opening toward Africa was not a new project. Rather, this is rooted in events that took place in 1998, after Turkish exclusion from the list of candidate countries for EU membership. Consequent to this, the then Minister of Foreign Affairs İsmail Cem decided to reformulate Turkish foreign policy guidelines. This reformulation included drawing up the Africa Action Plan (AAP), which highlighted the great potential of Turkey in Africa and showed that there was general sympathy for Turkey from African states.

Until that moment, the Turkish presence in Africa was very limited. The few existing links were with countries in North Africa, along with few others, including Nigeria, Ethiopia and South Africa.⁵⁶ Turkish foreign policy routes ignored Africa south of the Sahara. The purpose of the AAP was to develop a diplomatic framework that would facilitate the establishment of economic and cultural agreements with a growing number of African countries.⁵⁷ The main objectives were twofold: first, to diversify political partners (to garner support at international forums on the Cyprus issue); and second, to broaden economic markets. Domestic political instability and the lack of adequate resources, however, hindered the Turkish government in pursuing the AAP.

In 2005, the AKP government revived and re-elaborated the guidelines recommended by the AAP. Thanks to rapid economic growth, the AKP government was able to widen the scope of Turkish foreign policy by following a multi-directional approach.⁵⁸ Within this strategic framework, the Horn of Africa is one of the main regions where the Turkish state has increased its presence. It should be stressed that in both cases (1998 and 2005) the Turkish projection towards the Horn of Africa was a natural outgrowth of drivers that were largely situated in the economic sectors of the country.

54 Pinar Akpınar, 'Turkey's Peacebuilding in Somalia: The Limits of Humanitarian Diplomacy', *Turkish Studies* 14/4 (2014); Ali Abdirahman, 'Turkey's Foray into Africa: A New Humanitarian Power?', *Insight Turkey* 13/4 (2013); Senem Cevik, *The African Frontier in Humanitarian and Development Work* (Los Angeles: USC Center on Public Diplomacy, 2014); Federico Donelli, 'Turkey's presence in Somalia a humanitarian approach', in *The Depth of Turkish geopolitics in the AKP's foreign policy: From Europe to an extended neighbourhood*, ed. Bahri Yilmaz et al., Perugia: Università per Stranieri Press, 2015; Theodore Baird, 'The geopolitics of Turkey's 'humanitarian diplomacy' in Somalia: a critique', *Review of African Political Economy* 43/149 (2016).

55 Özkan and Orakçı, 'Viewpoint: Turkey as a "political" actor'; Aslan Davut Han and Selcuk Bahadir, 'Africa in Turkey's Foreign Policy Agenda: Trade, Economic and Military Cooperation', *Kwartalnik Naukowy Uczelni Vistula* 4/50 (2016); Abdurrahim Sıradağ, 'Turkey–Africa alliance: Evolving patterns in security relations', *African Security Review* 27/3-4 (2018).

56 Interview with Turkish foreign policy expert, 19 August 2020.

57 Interview with former Turkish diplomat, 23 August 2020.

58 Interview with Turkish scholar on Africa and MENA region, 31 August 2020.

Phases of Turkish involvement in Africa

Turkish involvement in the Horn of Africa may be categorized in three distinct phases: 2005–2010; 2011–2015; 2016–present.

2005–2010

In the first phase, Turkey built diplomatic and economic relations in African countries, particularly in the Horn of Africa, by exploiting different instruments of public diplomacy and by establishing a network of contacts. During this phase, the government, constituted by an emerging conservative political elite, faced several obstacles in Turkish institutions, including some key ministers such as the Minister of Foreign Affairs, and most of the diplomatic service and cadres.⁵⁹ Resistance was not so much to the new orientation of foreign policy as to the fact that it was promoted by a political party (AKP), the background of which diverged from the traditional Kemalist one.⁶⁰ This environment led to the establishment of a large number of new institutions and state agencies (i.e. AFAD, Yunus Emre Institute) and the strengthening of the prerogatives of pre-existing ones (i.e. the Turkish Cooperation and Coordination Agency (TİKA), Diyanet, DEİK) to bypass the institutional blocks.⁶¹ At the same time, the layered approach adopted by the government allowed the involvement of a growing number of civil society organizations, thereby giving rise to the civil society–state nexus that is one of the distinguishing traits of the Turkish presence in Africa.⁶² With respect to the Horn of Africa, Turkey acted to consolidate existing bilateral ties, first of all those with Ethiopia, its most relevant regional partner. In order to strengthen links with Addis Ababa, Turkey has followed a roadmap of semi-coordinated actions of state institutions and civil society organizations, including: opening schools through NGO and charitable foundations; diplomatic visits accompanied by business people and other representatives of civil society; establishing a TİKA office; starting scheduled flights by Turkish Airlines (partially state-owned); and opening an embassy and consulates.

Following this five-part template, Turkey tightened relations with Djibouti, Uganda, Sudan, Kenya and Eritrea.

2011–2015

The real watershed of Turkish engagement in the Horn of Africa is the role the country assumed in Somalia in 2011. Since then, Somalia has become the pivot of Turkish policy in the region. The humanitarian intervention in Somalia—whereby Turkish officials and charitable organizations staged high profile relief operations, including the visit of then Prime Minister Recep Tayyip Erdoğan and his family to Mogadishu, amid a contrasting

59 Interview with foreign policy adviser who served within the Turkish minister of foreign affairs, 19 August 2020.

60 Also known as Atatürkism or the Six Arrows, Kemalism is the founding ideology of modern Turkey. It defines large-scale political, social, cultural and religious reforms that were designed to separate the new Turkish state from its Ottoman predecessor.

61 Interview with staff member, Africa Foundation, 24 August 2020.

62 Interview with Turkish scholar on Africa and MENA region, 31 August 2020.

Western response defined by US counter-terrorism concerns—has had a significant impact on both the policy and the presence of Turkey in region.⁶³ From the perspective of Turkish policy, the situation in Somalia prompted Ankara to enhance the humanitarian dimension. Due to the popularity it gained at the international level, a few months after its initial humanitarian efforts Turkey decided to invest further in humanitarian diplomacy and institutionalized it as a niche area.⁶⁴

Deepening involvement in Somalia transformed the Turkish presence in the Horn of Africa through the adoption of a proactive unilateral approach to regional political issues. Until then, Turkey had remained external to the political and security issues of the region, engaging only in multilateral initiatives such as anti-piracy and counter-terrorism operations.⁶⁵ The stated Turkish political aim in the Horn of Africa was and still is to promote the stability of the region and the security of the Red Sea. According to Turkish policymakers, this goal can only be achieved by stabilizing Somalia, in particular through consolidation of Somali institutions.⁶⁶ To this end, Turkey has tried to maintain a balanced position with all regional actors. This is especially the case with Ethiopia and Kenya, which Ankara considers to be key stakeholders for Somali stability.

Following the Saudi-led military intervention in Yemen (Operation Decisive Storm) in 2015, and the 2017 rift within the Gulf Cooperation Council (GCC) focused on isolating Qatar, the Turkish presence in Somalia has taken on greater geostrategic significance. The Turkish decision to provide logistical support to Operation Decisive Storm was mainly dictated by the desire to reassure Riyadh about plans in Ankara to establish a military presence in Somalia.⁶⁷ Following the blockade of Qatar, however, Somalia became another battleground of political rivalry between opposing blocs.⁶⁸ In 2017, Turkey opened a military base in Mogadishu, its largest overseas base. Although formally and legally a facility for the training of the Somali National Army (SNA),⁶⁹ in practice it is a Turkish military outpost in the region and, consequently, perceived as a potential threat to the interests of its rivals.⁷⁰

63 Erdogan's visit to Mogadishu was the first by a foreign head of government since the early 1990s. Much has been written on the subject. For example, see: Pinar Akpınar, 'Turkey's Peacebuilding in Somalia: The Limits of Humanitarian Diplomacy', *Turkish Studies* 14/4 (2013); Brendon J Cannon, 'Deconstructing Turkey's Efforts in Somalia', *Bildhaan: An International Journal of Somali Studies* 16/14 (2016); Gizem Sucuoglu and Jason Stearns, *Turkey in Somalia: Shifting Paradigms of Aid* (Research Report South African Institute of International Affairs, 2016); Chuck Thiessen and Alpaslan Özerdem, 'Turkey in Somalia: challenging North/Western interventionism?', *Third World Quarterly* 40/11 (2019).

64 Interview with Turkish scholar on Africa and MENA region, 31 August 2020.

65 Federico Donelli, 'A hybrid actor in the Horn of Africa. An analysis of Turkey's involvement in Somalia', *The Horn of Africa since the 1960s. Local and International Politics Intertwined*, edited by Aleksis Ylönen and Jan Záhorský (London: Routledge, 2017: 158-170).

66 Interview with foreign policy adviser who served within the Turkish minister of foreign affairs, 19 August 2020.

67 Interview with think tank expert on Turkish security, 29 August 2020.

68 Brendon J Cannon and Federico Donelli, 'Asymmetric alliances and high polarity: evaluating regional security complexes in the Middle East and Horn of Africa', *Third World Quarterly* 41/3 (2020):505-524.

69 Ash Rossiter and Brendon J Cannon, 'Re-examining the "Base": The Political and Security Dimensions of Turkey's Military Presence in Somalia', *Insight Turkey* 21/1 (2019): 167-188.

70 On the security dimension, see: Siradağ, 'Turkey—Africa alliance'.

2016–present

Following the unsuccessful coup attempt in Turkey in 2016, several domestic changes—especially the transition to a presidential system—have altered Turkish foreign policy. Turkey has adopted an interventionist attitude in the regional crisis, with the consequent rebalancing between soft and hard power in favour of the latter. Since that moment, Turkish commitment to the Horn of Africa has been increasingly conditioned by Middle Eastern politics, with the effect of reducing the relevance of the Red Sea region in wider Turkish foreign policy. On the one hand, the assertive policy of the UAE and Saudi Arabia in the Horn has slowed down and partly downgraded Turkish plans. On the other hand, its own increasing interventionism (for example, in Syria and Libya) and the more immediate challenges (Islamic State, the YPG [*Yekîneyên Parastina Gel*, or People’s Protection Units] in Syrian Kurdistan and competition with Greece in the Eastern Mediterranean) have forced Turkey to rethink its strategic priorities.⁷¹

However, the Horn of Africa has subsequently lost strategic weight in the framework of Turkish foreign policy. This deprioritization is attributed to policymakers’ beliefs that in the context of regional competition (the wider Middle East) there is less to be gained in the Horn of Africa than in other areas.⁷² Moreover, despite the growing importance of the Horn of Africa to the Turkish trade balance, the region remains far less important than other areas such as North Africa. Consequently, at a time when Turkey faces difficult choices, the Horn of Africa is more expendable in terms of economic and political ties than other areas.⁷³ Therefore, the region does not play a priority strategic role in current Turkish foreign policy.

Qatar and the Horn: Multilateralism in action

Qatar has long viewed the Horn of Africa as a key arena for its status-enhancing multilateralist foreign policy. As a Qatari senior diplomat notes, ‘Africa is becoming more and more economically important, and the Horn is of course the most important and closest to our region.’⁷⁴ The organic multilateralist approach of Qatar was established under the leadership of Hamad bin Khalifa Al-Thani, the ruling emir from 1995 to 2013. Emboldened by significant economic and financial wherewithal,⁷⁵ Qatar positioned itself as a mediator of regional conflicts, in turn gaining recognition as a key player, and preserving its autonomy from neighbours perceived to be threatening, especially Saudi Arabia.⁷⁶ While the Qatari strategy in the Horn of Africa has remained largely unaffected

71 Michael M Gunter and Hakan Yavuz, ‘The October 2019 Turkish Incursion into Kurdish Syria: Its Background & Broader Implications’, *Middle East Policy* 27/1 (2020).

72 Interview with think tank expert on Turkish security, 29 August 2020.

73 Interview with TRT analyst, Africa desk, 22 August 2020.

74 Of all the countries in the greater Horn region, Qatari officials stress that Somalia and Sudan hold the highest status. Interview with senior diplomat, Qatar ministry of foreign affairs, 25 September 2020; interview with Qatari official, 27 September 2020.

75 Qatar became the largest LNG (liquefied natural gas) exporter by 2006–2007.

76 Interview with independent consultant and board member at Al-Araby Al-Jadeed, 21 September 2020; interview with Gulf expert, 21 September 2020.

by broader regional events—for example, the Arab Uprisings—from 2013 onward there has been a shift under Tamim bin Hamad (successor to Sheikh Hamad), with a Qatari official noting that foreign policy ‘is not the same under Tamim, things have calmed down of course, but aid, mediation and strategic investments continue’.⁷⁷

Together with Hamad bin Jassim Al-Thani, who served as minister of foreign affairs (1992–2013) and prime minister (2007–2013), Sheikh Hamad had positioned Doha ‘as the Oslo, Geneva or Vienna of the Islamic World—a destination for belligerents intent on undertaking discreet, if not secret, talks’.⁷⁸ In line with this approach, Qatar cultivated bilateral ties with a wide variety of political forces across the Middle East and beyond to garner support for its multilateralist strategy.⁷⁹ Qatar played a sizeable role in mediating several regional political disputes throughout the 2000s, including but not limited to: Morocco/Polisario Front (2004); Hamas/Fatah (2006, 2012); Lebanon (2008); and Sanaa government/Houthi movement (2008–2011).⁸⁰ As one observer notes, the Qatari decision to mediate nearby conflicts (including those in the Horn of Africa) is partly about promoting greater stability in an adjacent region, which would ultimately benefit Doha.⁸¹ In the Horn of Africa, Qatari mediation efforts have focused on conflicts in Eritrea (its border conflict with Djibouti), Sudan (particularly in post-2008 talks between Khartoum and Darfuri rebels) and through its influence with state-building processes in Somalia.

Ideology in Qatari engagement in the Horn

While it is often assumed that a major driver of Qatari involvement in the Horn of Africa is its support for political Islam, the reality is more complicated and nuanced. As one commentator explains, ‘Qatar is not a supporter of the Muslim Brotherhood [*per se*]. The country supported different political forces during the Arab Uprisings, like left-wing stakeholders.’⁸² In short, Qatar ‘does not have an ideological foreign policy’.⁸³ In a similar vein, a Qatari diplomat notes that ‘Qatar’s foreign policy is a mix of strategic hedging, pragmatism and realism, with an Islamic touch. We are not ideological *per se*’.⁸⁴ Rather than being the main driver of Qatari policies in the Horn, support from Doha for political Islam has largely been ‘instrumental’⁸⁵ and ‘opportunistic’,⁸⁶ as Doha seeks influence through access to political actors perceived as having power or capacity.

77 Interview with Qatari official, 27 September 2020.

78 Rory Miller and Harry Verhoeven, ‘Overcoming Smallness: Qatar, the United Arab Emirates and Strategic Realignment in the Gulf’, *International Politics* 57, no. 1 (1 February 2020): 10.

79 Mehran Kamrava, *Qatar: Small State, Big Politics*, Ithaca: Cornell University Press, 2013.

80 Sultan Barakat, ‘Qatari Mediation: Between Ambition and Achievements’, Doha: Brookings Doha Centre, 12 November 2014, 40.

81 Barakat, ‘Qatari Mediation’, 11.

82 Interview with independent consultant and board member at Al-Araby Al-Jadeed, 21 September 2020.

83 Interview with Gulf specialist, 22 September 2020.

84 Interview with senior diplomat, Qatar ministry of foreign affairs, 25 September 2020.

85 Interview with expert on the Muslim Brotherhood, 26 September 2020.

86 Interview with Gulf/Qatar expert, 26 September 2020.

At a practical level, Islamist political actors are often the most organized across the Red Sea region. Many political actors in the Horn of Africa (especially Somalia) have at least some element of Islamic identity woven into their founding organizational principles.⁸⁷ Any appearance of ideological support on the part of Qatar also waned following the retirement of Sheikh Hamad as emir in 2013. Unlike major neighbouring countries, 'Qataris never got the idea they had to fear political Islam. ... The Qatar Muslim Brotherhood [which dissolved in 2003] never had a political agenda.'⁸⁸ This has led to the perception that Qataris 'never really let the Brotherhood mingle in their affairs. ... They never really infiltrated Qatar as they did in the UAE.'⁸⁹

The limits of Qatari clout

The ripple effects of the intra-Gulf crisis highlight the lack of comprehensive strategy and the fragile political influence of Qatar in the Horn of Africa. The crisis is thought to have 'reduced Qatari options in terms of hedge betting'⁹⁰ and disrupted its ability to lead on mediation efforts in the region. With Doha marginalized, Abu Dhabi and Riyadh have successfully taken on a similar peacemaking approach. This contributed to their role in supporting Ethiopia and Eritrea's rapprochement in 2018, and the signing of peace agreements under their patronage in 2018. When judged against the recent impact of Riyadh and Abu Dhabi in the region, several commentators argue that Qatari influence is dwindling and much less relevant than before.⁹¹

The Gulf crisis drove a wedge between Qatar and Djibouti, the prior relationship between which had been historically 'cordial but limited'.⁹² In 2017, Djibouti support for the Anti-Terror Quartet (ATQ, Saudi Arabia, the UAE, Egypt and Bahrain) resulted in Qatar pulling out 450 peacekeepers positioned on the disputed land with Eritrea. The efforts of Doha to pen a peace deal had stalled.⁹³ The crisis provided Qatar with an opportunity to bury the issue. Similarly, by abiding by the ATQ position, gentle support from Asmara of the blockade⁹⁴ was perceived to be the result of its growing engagement with Abu Dhabi and Riyadh, which had been developing since 2015. Eritrea did not sever ties with Qatar but it is clear that the relationship between the two countries has significantly weakened. During the final days of then President Omar Hassan al-Bashir's regime in Sudan

87 For example, see: Life & Peace Institute, 'Alternatives for Conflict Transformation in Somalia', Nairobi: Life & Peace Institute, 2014, <https://life-peace.org/resource/alternatives-for-conflict-transformation-in-somalia/>

88 Interview with Gulf specialist, 22 September 2020.

89 Interview with expert on the Muslim Brotherhood, 26 September 2020.

90 Interview with independent consultant and board member at Al-Araby Al-Jadeed, 21 September 2020.

91 Interview with Gulf expert, 16 August 2020.

92 Federico Donelli, 'Strategy, Opportunity and Requirement: Qatar in the Horn of Africa before and after the GCC Crisis'

93 Sultan Barakat and Sansom Milton, 'Why Did Qatar Leave the Djibouti-Eritrea Border?', *Al-Jazeera*, 18 June 2017, <https://www.aljazeera.com/indepth/opinion/2017/06/qatar-army-djibouti-eritrea-border-170618100118290.html>.

94 Ministry of Information (Eritrea), 'Press Statement', Asmara: Ministry of Information, 12 June 2017, <https://shabait.com/2017/06/12/press-statement-47/>.

in 2019, Asmara accused Qatar and Turkey of supporting Eritrean Islamist opposition groups based in Sudan.⁹⁵ Relations may improve following the end of the ATQ blockade in early 2021.⁹⁶

The impact of the 2019 Sudanese revolution

From 2017, Sudan was caught in between Doha and the ATQ, with various actors in the Sudanese political and security elite exploiting connections to the Gulf to benefit themselves. While the Sudanese Rapid Support Forces (RSF) under General Hemedti provided the Arab coalition in Yemen with troops, al-Bashir granted major deals to Qatar and Turkey in Suakin off the Red Sea coast. In brokering the 2018 USD 4 billion agreement to develop and manage the Suakin port,⁹⁷ Doha ‘challeng[ed] Saudi Arabia on the Red Sea, facing Jeddah and Mecca. Qatar is not on the defensive anymore but on the offensive now’.⁹⁸ A few months earlier, Turkey had also signed a 99-year lease contract to build a naval quay for civilian and military vessels in Suakin.⁹⁹ TİKA also committed to refurbish an Ottoman historical building on the island.

Riyadh, Abu Dhabi and Cairo criticized these deals, which were eventually brought into question following al-Bashir's downfall. There are longstanding close ties between the Egyptian military and the Sudan Armed Forces, and links were growing between the Saudi/Emirati coalition and the RSF in the context of Yemeni operations.¹⁰⁰ The Transitional Military Council put on hold ‘all agreements, treaties and charters signed by the previous Sudanese government’; however, Ankara rejected this.¹⁰¹ Left with a damaged network,¹⁰² the Qatari project in Suakin was locked in a stalemate, and there has been little progress since phase one kicked off in April 2018.

Qatar is seen by many interviewees as having worked against the Sudanese revolution: ‘Qatar tried very hard for it not to succeed and used *Al-Jazeera* for that purpose.’¹⁰³ Overall, the Sudanese interpretation appears to be that Egypt and the Gulf states wanted

95 ‘Eritrea accuses Sudan, Turkey and Qatar of supporting opposition Islamist groups’, *Sudan Tribune*, 3 April 2019, <https://sudantribune.com/spip.php?article67316>.

96 Interview with Eritrean official, January 2021.

97 The Suakin port is to be managed by Mwani (Qatar Ports Management Company); see: ‘Sudan, Qatar to Sign \$4 Billion Deal to Manage Red Sea Port -Ministry’, *Reuters*, 26 March 2018, <https://www.reuters.com/article/us-sudan-qatar-idUSKBN1H22WH>.

98 Laura Angela Bagnetto, ‘New Port Projects in Red Sea Corridor for Sudan, Somaliland as Arab Backers Jostle for Position’, RFI, April 6, 2018, <https://www.rfi.fr/en/africa/20180406-new-port-projects-red-sea-corridor-sudan-somaliland-arab-backers-jostle-position>.

99 Despite this, both Ankara and Khartoum denied what some called a ‘military base’; Merve Şebnem Oruç, ‘Who is Disturbed by Turkey’s Presence on Sudan’s Suakin Island?’, *Daily Sabah*, 10 May 2019, <https://www.dailysabah.com/columns/merve-sebnem-oruc/2019/05/10/who-is-disturbed-by-turkeys-presence-on-sudans-suakin-island>.

100 Interview with AK, 18 July 2020; interview with anonymous source, Khartoum, 13 August 2020; interview with anonymous source, Khartoum, 15 August 2020.

101 Micha’el Tanchum, ‘Turkey’s String of Pearls: Turkey’s Overseas Naval Installations Reconfigure the Security Architecture of Mediterranean-Red Sea Corridor’, *Fokus*, Vienna: Austria Institut für Europa und Sicherheitspolitik, 2019, 2.

102 Interview with Gulf expert, 21 September 2020.

103 Interview with author and journalist in Khartoum, 22 August 2020.

to ensure control over the new post-revolution government.¹⁰⁴ They thought the Transitional Military Council—rather than civilian politicians and civil society leaders—should have executive power and wanted a cabinet with which they could work.¹⁰⁵

The Turkish relationship with Qatar

Since 2013, Turkey has developed increasingly close relations with Qatar, especially after the 2017 blockade. While the support that both Turkey and Qatar have provided to the Muslim Brotherhood is often seen as their most important shared agenda item, the broader convergence between the two states on regional security policy is connected with the common interest of countering, or containing, Saudi and Emirati power in the Horn of Africa and the wider Red Sea region.¹⁰⁶

The strategic alignment between Doha and Ankara has uneven effects in the Horn of Africa.¹⁰⁷ At a political and security level, the two countries have adopted some joint or complementary policies, particularly with respect to Somalia and al-Bashir era Sudan. On the ground, however, they do not always cooperate but rather are indirectly tied together, especially in financial terms.¹⁰⁸ For example, in Somalia, through the Qatar Fund for Development, Qatar is investing in a 122 km tarmac road construction between Mogadishu–Afgoi and Mogadishu–Jowhar, with a Turkish construction company implementing the project and Turkish engineers on the ground.¹⁰⁹

The strongest collaboration is evident in Somalia, where Turkey has been able to capitalize on the longstanding links established by Qatar with former members of the Islamic Courts Union and in the Somali diaspora. The network of connections that Qatar has shared with Turkey is useful both in the attempt to establish institutions and—as demonstrated by Turkish involvement in the May 2020 release of the Italian aid worker Silvia Romano—in developing links with Somali intelligence services, led by Fahad Yasin—director of the National Intelligence and Security Agency (NISA)—who has ties to Doha.¹¹⁰ In the coming years, the financial role Qatar plays in Somalia will be even more important because Turkey, already before the outbreak of the COVID-19 crisis,¹¹¹ had reduced its budget allocated to support Somali stabilization. Nonetheless, both countries pursue their own, partly hidden, agendas in the Horn of Africa, which do not always coincide or overlap.

104 Analysis of our Sudan field researcher.

105 Interview with anonymous source, Khartoum, 18 July 2020.

106 Interview with researcher on MENA region, 20 August 2020.

107 Interview with foreign policy adviser who served within the Turkish minister of foreign affairs, 19 August 2020.

108 Interview with staff member, Africa Foundation, 24 August 2020.

109 Interview with project coordinator of a Qatari organization in Mogadishu, 14 September 2020.

110 Brendon J Cannon and Federico Donelli, 'Turkey's Involvement in the Release of Silvia Romano in Somalia', *ISPI Commentary*, Milan: Italian Institute for International Political Studies, 26 May 2020.

111 Interview with TRT analyst, Africa desk, 22 August 2020.

Gulf states: Economic statecraft and chequebook diplomacy

Compared to Turkey, the hydrocarbon exporting countries in the Gulf are significantly better endowed to pursue investment and bilateral assistance programmes to support their political agendas. In the Horn of Africa, however, this approach is pursued unevenly between Saudi Arabia, the UAE and Qatar. The relationship that Saudi Arabia and the UAE have with Horn of Africa is, broadly, a transactional one. While this may be a simplistic approach, it rests on a series of complex trade-offs between various actors with different economic and political objectives.¹¹² In particular, the hands-on, paternalistic and mostly bilateral political style of Riyadh and Abu Dhabi allows them to trade loyalties and secure allegiances through promises of generous financial support.¹¹³ This plays well in the competitive political marketplace of the Horn of Africa, particularly in Somalia and Sudan.¹¹⁴

This approach has enabled Saudi Arabia and the UAE to swiftly establish and project power in a region where, until quite recently, their presence at a political level was only lightly felt. Both countries have become serious ‘agents of development finance’ in the region but this is largely being deployed ‘for their own financial and political interests’.¹¹⁵ In contrast, the Qatari appetite for investments in the Horn of Africa has been comparatively restrained. Qatari financial flows are channelled more often via development assistance or more opaque political finance, through unofficial engagement with key elite actors (especially in Sudan, Eritrea and Somalia).

Political incentives for the Gulf states in the Horn of Africa frequently result from security considerations, which are tied up with development issues. For example, chronic insecurity on land and sea may cause problems for neighbours, such as piracy in the Indian Ocean region. The Gulf states increasingly recognize this development–security nexus. At the same time, their economies benefit from long-term strategic investments in African food, agriculture, energy and real estate. As a consequence, Riyadh and Abu Dhabi have targeted Ethiopia and Sudan—both of which have great potential as agricultural and energy suppliers—with most investment in the region, although the strategic positioning of the ports in Djibouti has also made it a target for Gulf investment, particu-

112 Federico Donelli, ‘Determinants of Middle East States Involvement in the Horn of Africa’, in *Africa and the Middle East: Beyond the Divides*, POMEPS Studies 40, 50–53, Washington, DC and New York: Project on Middle East Political Science, George Washington University and School of International and Public Affairs, Columbia University, June 2020, <https://pomeps.org/determinants-of-middle-east-states-involvement-in-the-horn-of-africa>.

113 For more details, see: Khalid S Al-Mezaini and Jean-Marc Rickli, *The Small Gulf States: Foreign and Security Policies before and after the Arab Spring*, London: Routledge, 2017.

114 Alex de Waal, *The Real Politics of the Horn of Africa*, Cambridge: Polity, 2015.

115 Karen Young, ‘Gulf Financial Aid and Direct Investment’, Washington, DC: American Enterprise Institute, 13 August 2020, 7.

larly from the UAE.¹¹⁶ Ethiopia, the most populous country in the region, and the second in Africa, also has a large consumer market that GCC countries are keen to exploit.¹¹⁷ The (more limited) Qatari investment profile has deeper roots in Sudan, although these relations have been disrupted by the 2019 revolution. While Ethiopia is an increasing priority for Qatar, its investment approach is still in an early, and tentative, phase.

The Gulf states practice economic statecraft in the Horn of Africa through foreign direct investments (FDI), official development assistance (ODA) and aid to central banks. These tools and instruments support the growing political influence of the Gulf states. Sovereign wealth funds, state-owned companies, national institutions and charity organizations are the primary tools through which funds are channelled.¹¹⁸ State-level actors are the most engaged since Gulf investments in the Horn ‘depend mainly on significant political backing by ... governments’.¹¹⁹

Saudi and Emirati investment strategies

The following tables and figures provide an overview of Saudi and Emirati economic flows since 2003 in Djibouti, Ethiopia and Sudan.¹²⁰

Table 1. *UAE economic statecraft in Sudan, Ethiopia and Djibouti in USD million (2003–June 2020)*

	Government-related FDI	Private FDI	Aid/Intervention (ODA)	Total
Djibouti	1,694.7	47.7	19.6	1,762
Ethiopia	214.2	1,574.5	3,109.9	4,898.6
Sudan	68	725.1	3,582.1	4,375.2
Total	1,976.9	2,347.3	6,711.6	Total 11,035.8

Source: Karen Young, ‘Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)’, Washington, DC: American Enterprise Institute, August 2020

116 J Meester, W van den Berg and H Verhoeven, ‘Riyal Politik: The Political Economy of Gulf Investments in the Horn of Africa’, The Hague: Clingendael, April 2018.

117 Interview with David Roberts, 12 August 2020; interview with Karen Young, 11 August 2020 .

118 Meester, van den Berg and Verhoeven, ‘Riyal Politik’.

119 Meester, van den Berg and Verhoeven, ‘Riyal Politik’, 5.

120 Data collected from: Karen Young, ‘Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)’, Washington, DC: American Enterprise Institute, August 2020. Eritrea and Somalia are considered later in the report.

Table 2. *Saudi Arabia economic statecraft in Sudan, Ethiopia and Djibouti in USD million (2003-June 2020)*

	Government-related FDI	Private FDI	Aid/Intervention (ODA)	Total
Djibouti	-	-	466.9	466.9
Ethiopia	-	464.7	152.3	617
Sudan	15.9	108.7	2,333.1	2,457.7
Total	15.9	573.4	2,952.3	Total 3,541.6

Source: Karen Young, 'Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)', Washington, DC: American Enterprise Institute, August 2020

Table 1 and Table 2, along with Figure 1 and Figure 2, provide a snapshot of the economic statecraft of The UAE and Saudi Arabia in the Horn of Africa. They show that the Saudis have generally deployed fewer economic means than the Emiratis to widen their sphere of influence.¹²¹ In contrast, the UAE chequebook diplomacy approach—in terms of the amounts spent or invested—is far more significant. In effect, Abu Dhabi strives to carve out a legitimate and robust hold in a region where, due to its small size and location across the Arabian Peninsula, it is not a natural hegemon. Aid and investments flowing from the Emirates are also more strategically deployed than those of Saudi Arabia.¹²² A Saudi adviser at the ministry of investment puts it this way:

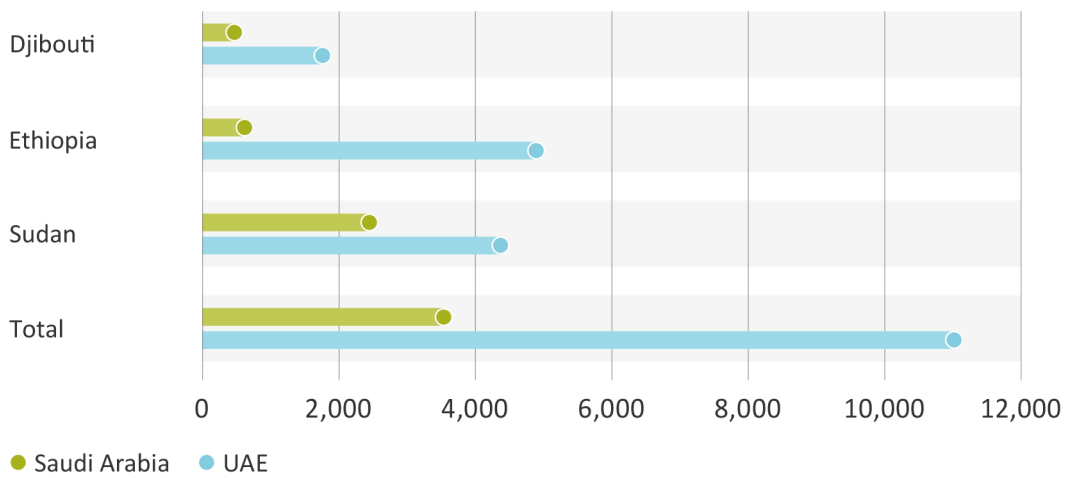
We [the kingdom] need to do a lot more to develop our Africa strategy and approaches. The Horn is primary here. It is our near abroad, our neighbourhood. We must develop things around Vision 2030, the public investment fund, development and job creation. ... At present, things are a little scattered.¹²³

121 Interview with Karen Young, 11 August 2020.

122 Interview with Gulf expert, 20 August 2020.

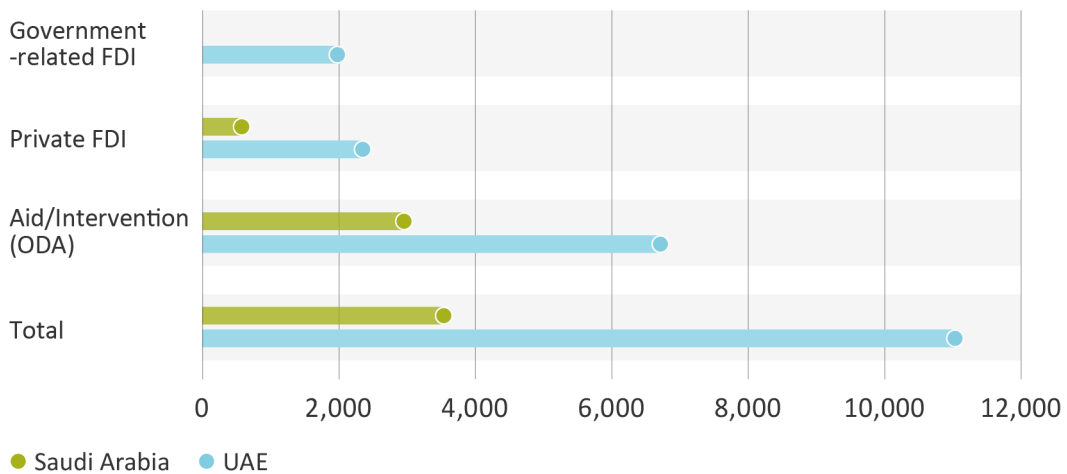
123 Interview with adviser, Saudi ministry of investment, 14 August 2020.

Figure 1. *Saudi Arabia and UAE economic flows to Djibouti, Ethiopia and Sudan, by country (USD millions) (2003–June 2020)*



SOURCE: Karen Young, ‘Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)’, Washington, DC: American Enterprise Institute, August 2020

Figure 2. *Saudi Arabia and UAE economic flows to Djibouti, Ethiopia and Sudan by type (USD millions) (2003–2020)*



SOURCE: Karen Young, ‘Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)’, Washington, DC: American Enterprise Institute, August 2020

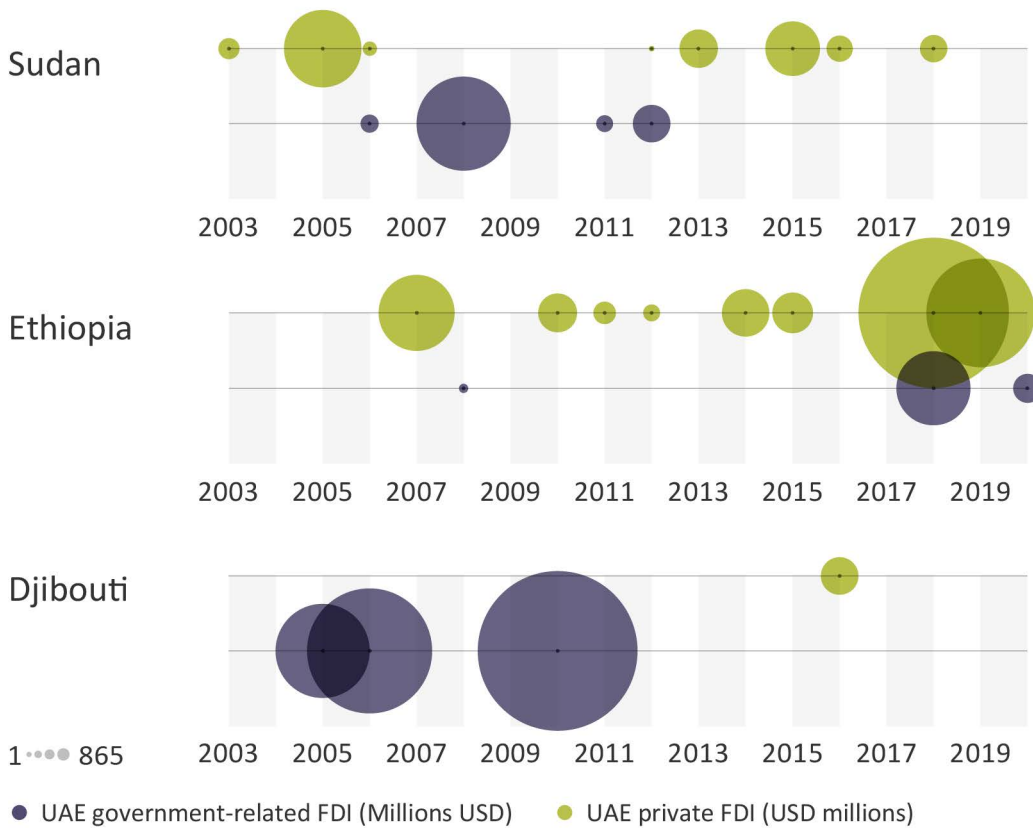
While Table 1, Table 2, Figure 1 and Figure 2 offer an overview of financial support and investments, they are incomplete. Due to the opacity of Gulf states over financing streams, this dataset is inaccurate with regard to the breadth of government-related and private FDI, especially from Saudi Arabia. In 2018, the Clingendael Institute outlined a representative database of 434 GCC investment projects in the Horn of Africa (Djibouti,

Ethiopia, Sudan, South Sudan and Somalia).¹²⁴ Between 2000 and 2017, Saudi investments—both private and government-related—reached approximately USD 4.9 billion. Of 252 projects, 233 are related to the agricultural and manufacturing sectors in Ethiopia, primarily in Addis Ababa and in the Oromia Region.¹²⁵

A Saudi commercial attaché describes the evolving view of the Horn of Africa in the minds of investors from the kingdom:

Beyond food security, the Horn is becoming more of a consumer market for telecoms and an energy market as things develop. ... You will know that Saudi business people regularly trade with Ethiopia. ... And the biggest employer after the government was a Saudi Ethiopian Sheikh, Al-Amoudi.¹²⁶

Figure 3. *Emirati FDI flows, public and private (USD millions)*



SOURCE: Karen Young, 'Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)', Washington, DC: American Enterprise Institute, August 2020

124 Meester, van den Berg and Verhoeven, 'Riyal Politik', 40.

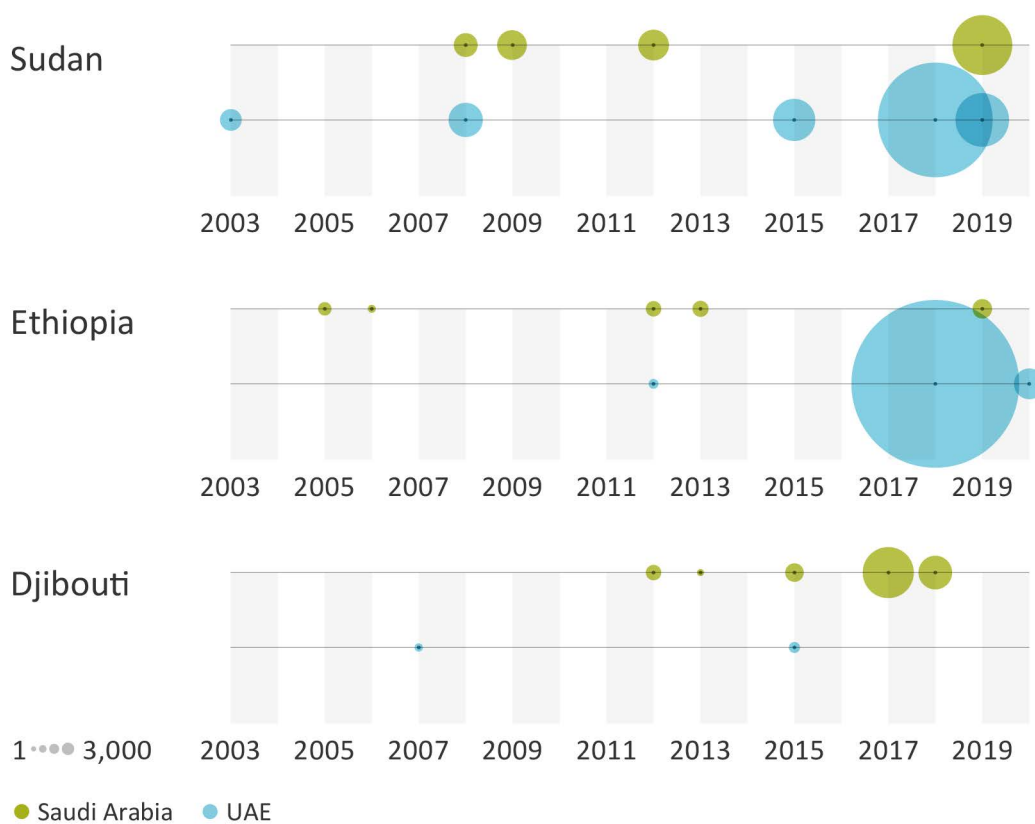
125 Meester, van den Berg and Verhoeven, 'Riyal Politik', 45–46.

126 Interview with a Saudi commercial attaché, 2 September 2020. Al-Amoudi's company, Mohammed International Development Research and Organization Companies (MIDROC), has paved the way for many other companies to invest in the agricultural, manufacturing, mining and real estate sectors. For a few relevant figures, see 'Mohammed Al Amoudi: Ethiopia's Richest Man Spots Opportunities At Home', *Ventures Africa*, 8 September 2013.

The same trend is observed with the UAE, the investments of which amount to USD 5.1 billion over the same period. Of 133 projects, 104 are in Ethiopia, which Gulf states consider to be an agricultural powerhouse.¹²⁷ Many of these projects are not publicized, as inferred by data gaps and asymmetries in reports covering FDI.

The majority of capital investment in Djibouti comes from the GCC. Between 2003 and 2020, Gulf countries invested USD 3.5 billion—mostly between 2003 and 2011.¹²⁸ The UAE invested USD 1.8 billion to build the Doraleh port terminal during the 2000s. The 2018 investment surge in Ethiopia occurred at the same time Abu Dhabi was signing a USD 3 billion aid and investment agreement with Ethiopia (see Figure 4).

Figure 4. **UAE and Saudi Arabia aid or intervention (ODA) (USD millions)**



SOURCE: Karen Young, ‘Gulf Financial Aid and Intervention Tracker by Source Country (2003 to June 2020)’, Washington, DC: American Enterprise Institute, August 2020

Of the USD 3 billion pledged, USD 1 billion was transferred to the National Bank of Ethiopia as balance-of-payments support. The rest is to be invested in energy, agricultural

127 Interview with UAE-based business person, 6 September 2020. This interviewee describes that there are, ‘plenty of opportunities in the agriculture space in the Horn. It is not just Dubai and Abu Dhabi but companies from the northern Emirates, too.’

128 Young, ‘Gulf Financial Aid and Direct Investment’, 20.

and tourism projects.¹²⁹ Along with transportation, these are the most important sectors targeted by ODA in general.

In the same vein, the surge in Saudi and Emirati assistance to Sudan in 2019 (see Figure 5 and Figure 6) is linked to the USD 3 billion pledge made to the new military authorities in Khartoum in April of that year, which swiftly followed the ousting of al-Bashir following a sustained popular and largely nonviolent uprising.¹³⁰ Saudi Arabia and the UAE had been supporters of al-Bashir's regime prior to his fall. In 2018, for example, the UAE transferred USD 1.4 billion to the Sudanese central bank—seemingly as an attempt to prop up al-Bashir in the face of an accelerating economic crisis, the seeds of which had been sown by the secession of South Sudan in 2011 and the resultant drop in Sudanese oil revenues.¹³¹

Similarly, in 2015 Saudi Arabia reportedly deposited USD 1 billion with the Sudanese central bank as a quid pro quo for al-Bashir's decision to cut ties with Iran—the main rival of the kingdom in the region—and commit troops to the war in Yemen.¹³² While al-Bashir's ability to leverage shifts in the regional geopolitical landscape to win support from the Gulf powers was a singular talent, the Gulf states increasingly became tired of this opportunistic behaviour. The inability of al-Bashir's corrupt government to provide a stable environment for their inward investment was also problematic. For example, their ask-no-questions support for al-Bashir garnered disapproval from Western countries, the views of which were influenced by the sympathy of al-Bashir's regime for extremist Islamist groups in the 1990s, and violent counterinsurgency and genocide in southern Sudan and Darfur in the 2000s. For these reasons, the Gulf states showed little regret in channelling their support to the new Transitional Military Council in Khartoum in 2019.

During the Sudanese revolution, Egypt, the UAE and Saudi Arabia all supported a continued leading role for the Transitional Military Council in the political transition. There was, however, disagreement about which security institutions should be on top. Egypt backed the Sudan Armed Forces under General Burhan,¹³³ while the UAE supported the Rapid Support Forces under General Hemedti.¹³⁴ Sudanese actors involved in the revolution pushed back against Egypt, stressing differences between the role of the mili-

129 Aaron Maasho, 'UPDATE 2-UAE to Give Ethiopia \$3 Billion in Aid and Investments', *Reuters*, 15 June 2018, <https://af.reuters.com/article/ethiopiaNews/idAFL8N1TH4GJ>. Accordingly, it is not fully correct to consider the USD 3 billion as only being ODA.

130 By October 2019, Sudan had received half of the package (USD 500 million deposited in the central bank; and USD 1 billion worth of diverse products and wheat).

131 See William Wallis, 'Sudan's economy reels from loss of south', *Financial Times*, 17 October 2011. <https://www.ft.com/content/ce7f675a-f8c9-11e0-ad8f-00144feab49a>

132 Giorgio Cafiero, 'Sudan gets \$2.2B for joining Saudi Arabia, Qatar in Yemen war', *Al-Monitor*, 23 November 2015, <https://www.al-monitor.com/pulse/originals/2015/11/sudan-saudi-arabia-war-yemen-houthi-economy.html>

133 Interview with anonymous source, Khartoum, 18 July, 2020.

134 Interview with anonymous source, Khartoum, 1 August 2020.

tary in Sudan and Egypt¹³⁵ (where a 2013 coup re-asserted effective military control over the post-revolutionary trajectory in Egypt).

According to some Sudanese interviewees, one of the main factors underlying the difference in positions between the UAE and Saudi Arabia, on one hand, and Egypt, on the other, regarding the political setup following the revolution is that ‘Egypt knows it has influence over some SAF individuals’,¹³⁶ while the UAE and Saudi believe they have influence over the RSF ‘as an institution’.¹³⁷ The Egyptian concern was that if the SAF members with whom the country has ties were removed for any reason, Cairo would lose influence over the SAF as an institution.¹³⁸

Saudi and Emirati investment beyond the headlines

While the headline figures of Saudi and Emirati investments in Ethiopia, Sudan and Djibouti may appear impressive, these numbers do not capture the wide range of private but government-assisted investment activity that Gulf companies engage in across the region. There is a pattern of linkages between such projects and key figures in the governments and ruling families of the Gulf states and their individual political and commercial agendas. Their investments in the Horn of Africa are no exception to this general pattern.

In 2015, a UAE–Sudan investment forum was held in Abu Dhabi, where Khartoum made USD 59 billion worth of investments available to companies based in the UAE.¹³⁹ By 2018, it was reported that 17 Emirati companies were operating in Sudan across several different sectors, including tourism, agriculture, aviation, oil and gas.¹⁴⁰

Similarly in Ethiopia, a UAE–Ethiopia Business Advisory Council was established in 2018. This group is jointly led by the UAE embassy in Addis Ababa and supported by the Dubai Chamber of Commerce and Industry. It aims to help to connect Emirati investors and Ethiopian business people.¹⁴¹ In March 2019, the second Emirati–Ethiopian Business Forum held in Addis Ababa brought together 60 business and government delegations.

135 Interview with anonymous source, Khartoum, 18 July 2020.

136 Interview with anonymous source, Khartoum, 4 August 2020.

137 Interview with anonymous source, Khartoum, 4 August 2020.

138 Interview with anonymous source, Khartoum, 4 August 2020.

139 ‘Sudan Offers UAE’s Companies \$59 Billion Investment Opportunities’, *Sudan Tribune*, 15 May 2015, <https://sudantribune.com/spip.php?article54996>.

140 ‘UAE Plays Key Role in Sudan Economy with Investments Exceeding AED28 Billion’, *WAM*, 13 March 2018, <http://wam.ae/en/details/1395302674291>.

141 ‘Advisory Council Outlines Plans for UAE Investors in Ethiopia’, *Khaleej Times*, 9 February 2020, <https://www.khaleejtimes.com/business/local/advisory-council-outlines-plans-for-uae-investors-in-ethiopia>.

Table 3. *Select Emirati private and public investments in Ethiopia, Sudan and Djibouti*¹⁴²

	Company	Sector	Investment	Amount	Year
Sudan	Rotana (Abu Dhabi based)	Hotel	Agreement for the construction of a new hotel in Khartoum (the second after Al-Salam Rotana) ¹⁴³	-	Signed in 2014
	Jenaan Investment (Abu Dhabi based)	Agriculture	Joint venture with the government of Sudan (Amtaar Investment), objective: farming 10,000 ha of land in the country ¹⁴⁴	-	Signed in 2018
Ethiopia	Julphar Pharmaceutical Industries (Saudi based)	Pharmaceutical	Pharmaceuticals manufacturing facility ¹⁴⁵	-	Opened in 2013
	Al Ghurair Aluminium Group (Dubai based)	Aluminium	Joint venture to build the first aluminium production plant in the country ¹⁴⁶	USD 50 million	Sep 2014
Djibouti	Nakheel Hotels and Resorts ¹⁴⁷ (real estate arm of Dubai World)	Hotel	Built the 5-star Kempinski hotel, the only one in the country ¹⁴⁸	USD 300 million	Opened in Nov 2006
	Lootah Group of Companies (name of its subsidiary in Djibouti: Imnaa) (Dubai based) ¹⁴⁹	Diverse investments (e.g. properties)	Construction of a major compound near the US military base (Haramous village), among other examples	-	-

SOURCE: Various, as indicated in relevant footnotes

142 It should be noted that many of these projects may have not materialized.

143 'UAE Plays Key Role in Sudan Economy with Investments Exceeding AED28 Billion', WAM, 13 March 2018, <http://wam.ae/en/details/1395302674291>.

144 'Abu Dhabi's Efforts to Boost Local Agricultural Production', farmlandgrab.org, 28 February 2018, <https://farmlandgrab.org/post/view/27920>.

145 'Julphar Manufacturing Facility, Addis Ababa', Pharmaceutical Technology, February 2013, <https://www.pharmaceutical-technology.com/projects/julphar-manufacturing-facility-addis-ababa/>.

146 'Ethiopia: \$50 Million Aluminium Plant', Aluminium International Today, September 24, 2014, <https://aluminiumtoday.com/news/ethiopia-50-million-aluminium-plant>.

147 Sultan bin Sulayem, chair of DP World, is also a board member of Nakheel and one of the founding members of the property development organization.

148 Shakir Husain, 'Nakheel to Open Djibouti Palace Hotel next Month', *Gulf News*, 4 October 2006, <https://gulfnews.com/business/tourism/nakheel-to-open-djibouti-palace-hotel-next-month-1.259252>.

149 Ibrahim Saeed Ahmad Lootah, head of the Lootah Group of Companies, was reportedly in great difficulty in 2016. See 'Lootah Group of Companies Still in Difficulty', *Africa Intelligence*, 2 September 2016, https://www.africaintelligence.com/eastern-and-southern-africa_business/2016/09/02/lootah-group-of-companies-still-in-difficulty,108179463-bre.

UAE companies are also engaged in investment activities in Djibouti, Somalia and Eritrea. Given the strategic advantages of these three countries, coupled with their comparatively small size, poor infrastructure and political marginalization (particularly in the case of Eritrea), most investments are related to coastal areas, which offer opportunities to Gulf countries. In particular, investments in port infrastructure in Djibouti, Somaliland and Puntland are estimated to total around USD 2.5 billion.¹⁵⁰ Related projects (for example, the extension of Bosasso airport in Puntland) are also attractive to Emirati investors, which already hold the concession for nearby Bosasso port.

Given its strategic location, Djibouti has attracted Saudi investment. For example, in 2018, the Saudi Development Fund agreed to build a corridor from Djibouti city to Galafi on the Ethiopian border.¹⁵¹ Saudi investment comes to Djibouti despite the fractious relationship the latter has had with the Emiratis since 2014, amid a dispute over the Dubai Ports World concession to run the Doraleh container facility (which it built from 2006).¹⁵²

Saudi Arabia uses similar methods to bring economic opportunities in the Horn of Africa to the attention of Saudi investors. For example, in December 2019 the Ethio–Saudi Arabia Business Forum was held in Addis Ababa. Some 229 separate Saudi investors appear to be active in Ethiopia at present.

The countries in the Horn of Africa have benefited from the increases in Saudi and Emirati investment that has materialized in recent years. Nonetheless, there are some concerns from the African shores of the Red Sea that these flagship projects often do not actually materialize or progress at a very slow pace.

For example, in 2018, the Abu Dhabi-based real estate company Eagle Hills revealed a USD 1.5 billion housing project in Addis Ababa called ‘La Gare’. Two years later, there is little evidence of progress being made in its construction, despite a January 2020 sales campaign for space in the first tower.¹⁵³ While Dubai Ports World (DP World) recently

150 Somaliland (USD 442 million being invested); Puntland (USD 336 million [presumably] being invested); Djibouti (USD 1,700 invested). Sudanese ports are also attractive to Emirati businesses. DP World is recently reported to be lobbying for Port Sudan control. For example, see: ‘KHARTOUM Denies Reports about UAE’s Control of Port Sudan’, *Sudan Tribune*, 27 April 2020, <https://sudantribune.com/spip.php?article69263>; Aaron Schaffer, ‘Dubai Ports Giant Hires Ex-Israeli Intelligence Official to Land US Support for Sudan Bid’, *Al-Monitor*, 7 January 2020, <https://www.al-monitor.com/pulse/originals/2020/01/dubai-ports-hire-ex-mossad-us-support-sudan-bid.html>.

151 It should be noticed that this data does not take account of funds allocated by multilateral institutions such as the Arab Fund for Economic and Social Development and the Islamic Development Bank, from which Djibouti has benefited.

152 Jon Gambrell, ‘Djibouti seizes control of DP World’s container terminal’, *AP News*, 22 February 2018, <https://www.seattletimes.com/business/djibouti-seizes-control-of-dp-worlds-container-terminal/>.

153 ‘Eagle Hills Unveils First Tower at Ethiopia’s \$1.5bn La Gare Scheme’, *Global Construction Review*, 24 January 2020, <http://www.globalconstructionreview.com/news/eagle-hills-unveils-first-tower-ethiopias-15bn-la-/>. For a detailed examination of the project, see: B Terrefe, ‘Urban layers of political rupture: the “new” politics of Addis Ababa’s megaprojects’, *Journal of Eastern African Studies* 14/3 (2020).

delivered some significant commitments in Berbera in Somaliland,¹⁵⁴ its subsidiary in Puntland, P&O Ports, has been criticized for mismanaging the Port of Bosaso, where the USD 336 million pledged in 2017 had yet to be spent by mid-2020.¹⁵⁵

Table 4. *Diverse Saudi private and public investments in Ethiopia and Sudan*

	Company	Sector	Investment	Amount	Year
Sudan	Iktifaa	Agriculture	Agricultural and animal projects ¹⁵⁶	-	Agreement signed in 2014
	Dallah Al Baraka	Agricultural	Acquisition of 'two million acres of farmland in eastern Sudan, to produce food for export' ¹⁵⁷	-	Announcement made in 2012
Ethiopia	ACWA POWER Company	Energy	Construction of two solar projects (250 MW) ¹⁵⁸	USD 300 million	Agreement signed in 2019

Source: Various, as indicated in relevant footnotes

Another recent example is the Dubai-based construction company ALEC Engineering & Contracting LLC (one of the largest in the Middle East), which recently kicked off the revamping of Addis Ababa municipality headquarters for nearly USD 50 million. Previously, the same company had been involved in the refurbishment of the prime minister's office.¹⁵⁹ There has been some domestic criticism over the selection of foreign firms for these projects but use of such firms fits with Prime Minister Abiy Ahmed's vision of the transformation of the Ethiopian capital city, which includes a number of high profile projects.¹⁶⁰

154 DP World, 'We Have Just Completed a 400m Quay and a New Extension at Berbera Port, Somaliland. Once Operational, It Will Increase the Terminal's Capacity by 500,000 TEUs per Year, and Will Further Strengthen Berbera as a Major Regional Trade Hub Servicing the Horn of Africa', Twitter, 10 August 2020, https://twitter.com/DP_World/status/1292855504268664832. Dubai-based company Shafa Al-Wahda Contracting Company is in charge of the Berbera extension work. The same company was in charge of the modernization of Dakar and Maputo ports.

155 'Somalia: Puntland Ports Minister Grilled in Parliament over Bosaso Seaport Deal', Garowe Online, 30 July 2020, <https://www.garoweonline.com/en/news/puntland/somalia-puntland-ports-minister-grilled-in-parliament-over-bosaso-port-deal>.

156 'Saudi Company to Invest in Sudan Agriculture', *Al Arabiya English*, 5 January 2014, <https://english.alarabiya.net/en/business/economy/2014/01/05/Saudi-company-to-invest-in-Sudan-agriculture>.

157 Pratap Chatterjee, 'Middle Eastern Investors "Grab" Sudan Farmland', Corpwatch, 30 April 2012, <https://corpwatch.org/article/middle-eastern-investors-grab-sudan-farmland>.

158 'Ethiopia, Saudi Fund Sign \$140m Loan Deal', *Ethiopian Monitor*, 19 December 2019, <https://ethiopianmonitor.com/2019/12/19/ethiopia-saudi-fund-sign-150-loan-deal/>.

159 Samuel Gelila, 'City Municipality to Get Major Facelift', *Addis Fortune*, 22 August 2020,

160 Terrefe, 'Urban layers of political rupture'.

Limited investment appetite: Qatar

The investment track record of Doha presents a contrast to the Saudi and Emirati approaches to the Horn of Africa. While Qatar, particularly the Qatar Investment Authority (QIA), has aspirations to increase its investments in the Horn of Africa (evidenced by the decision to form a new unit to find investment opportunities in the region),¹⁶¹ at present they remain fairly limited, particularly when compared with other Gulf countries and Turkey. With its large consumer market, Ethiopia is the most likely destination for QIA projects but investment has been limited over the last two decades and is still at the exploration stage.¹⁶² A Qatari diplomat anticipates, 'In the future, I envisage that we will develop more ties with Ethiopia, Nigeria and the bigger states from an investment and trade perspective.'¹⁶³ Up to 2020, there have only been 18 significant Qatari investment projects documented in the Horn of Africa: 12 in Ethiopia, 4 in Sudan and 2 in South Sudan, totalling USD 0.6 billion.¹⁶⁴

The Ethiopian chamber of commerce reports eight investments between 2008 and 2017 in various fields, including agriculture, manufacturing, real estate, construction and transport, totalling USD 50 million.¹⁶⁵ The visit of the Ethiopian prime minister to Qatar in March 2019 was aimed at bolstering both political and economic ties.¹⁶⁶ Neither Abiy's visit nor the Ethio–Qatar business forum organized in Doha in 2020 have resulted in Qatari ambitions in Ethiopia being translated into reality.¹⁶⁷

Likewise, investments in Sudan have fallen short of stated objectives. There have been a range of planned projects in agricultural land to ensure food security—a seemingly recurring but overstated driver of engagement. In June 2018, the state-owned company Hassad Food (the QIA food investment subsidiary) signed a memorandum of understanding in Khartoum to invest half a billion US dollars in agricultural projects over three years.¹⁶⁸ It is unknown whether the agreement has persisted following the downfall of al-Bashir in 2019.

Qatar National Bank (QNB) and Qatar Islamic Bank (QIB) both have offices in Sudan. In an interview conducted in November 2017 in Khartoum, a QNB high-level agent explains that:

161 Donelli, 'Strategy, Opportunity and Requirement'.

162 Jonathan Fenton-Harvey, 'Qatar Seeks Increasing Development Projects in Africa', *Al-Monitor*, 6 September 2019, <https://www.al-monitor.com/pulse/originals/2019/09/qatar-support-projects-africa-somalia.html>.

163 Interview with Qatari official, 27 September 2020.

164 Meester, van den Berg and Verhoeven, 'Riyal Politik'.

165 Ethiopian Chamber of Commerce, 'A Brief Overview of the Bilateral Trade Relationship between Ethiopia & the State of Qatar', Addis Ababa: Ethiopian Chamber of Commerce, no date, <http://ethiopianchamber.com/Data/Sites/1/downloadables/b2b-files/New/Qatar%20Country%20Profile.docx>.

166 Daniel Mumbere, 'Ethiopia PM Seeks Qatari Investment', *Africanews*, 20 March 2019, <https://www.africanews.com/2019/03/20/ethiopia-pm-seeks-qatari-investment/>.

167 Interview with independent consultant and board member at Al-Araby Al-Jadeed, 21 September 2020.

168 'Hassad to Invest \$500 Million in Sudanese Agricultural Sector', *QNA*, 28 June 2018, <http://news.qna.org.qa/lang/en/w/article/1530201750109997500>.

Doing business in Sudan is very hard. ... There are many unforeseen costs such as the taxes from one state to another. ... Also, Sudan is not competitive at all for the moment for the Gulf states, which import a lot more [for example, food products] from Brazil or Australia], for instance.¹⁶⁹

Gulf investment and the Chinese Belt and Road Initiative

The Chinese Belt and Road Initiative (BRI), which promises vast investment in an infrastructure network—or series of networks—stretching from China to southern Europe, is likely to present opportunities for further Gulf expansion into the Horn of Africa. At present, however, these opportunities seem to be being exploited most effectively by the UAE, which has been able to leverage its strength in maritime infrastructure (notably ports) to carve a niche as a key partner for Chinese infrastructure expansion in the Horn of Africa region.

The focus of the BRI in the eastern side of Africa on maritime infrastructure (known as ‘The Maritime Silk Road’)—shipping routes and their requirements on land—has given the UAE, with its focus on ports, a particular advantage in benefiting from Chinese ambitions in the region.¹⁷⁰ Rather than being supplanted by Beijing, Emiratis are leveraging their status as the second most important Chinese trading partner in the Middle East to position themselves as a truly strategic partner; for instance, they are one of five comprehensive strategic partners in the region, along with Algeria, Egypt, Iran and Saudi Arabia.¹⁷¹ The Emiratis believe that the diminishing power of the United States has paved the way for the continued ascent of China; in turn, Emirati integration into the BRI project requires engagement along the maritime and digital routes.¹⁷² The UAE is an important middle-size power upon which China hopes to rely in order to better enhance its global project.¹⁷³

Against this backdrop, in 2019, China and the UAE brokered a USD 3.4 billion deal¹⁷⁴ covering investments that include a USD 2.4 billion ‘international station for the Belt and Road Initiative in Dubai’ that will be used to ‘store and ship Chinese products from Jebel Ali to the world’.¹⁷⁵ While they are benefiting from the opportunities provided by the BRI, the Emirates ‘don’t see themselves [simply] as clients of China but, in fact, see

169 Interview with QNB agent, Khartoum, November 2017.

170 John Calabrese, ‘China’s Maritime Silk Road and the Middle East: Tacking Against the Wind’, Washington: Middle East Institute, 19 May 2020, <https://www.mei.edu/publications/chinas-maritime-silk-road-and-middle-east-tacking-against-wind>.

171 Camille Lons, Jonathan Fulton, Degang Sun and Naser Al-Tamimi, ‘China’s great game in the Middle East’, Policy Brief, London: European Council on Foreign Relations, 21 October 2019, https://ecfr.eu/publication/china_great_game_middle_east/.

172 Interview with Gulf expert, 20 August 2020.

173 Interview with Gulf expert, 25 August 2020.

174 ‘UAE Signs Deals with China under Belt and Road Initiative’, The Economist Intelligence Unit, 8 May 2019, http://country.eiu.com/article.aspx?articleid=1857968369&Country=United%20Arab%20Emirates&topic=P_7.

175 ‘HH Sheikh Mohammed bin Rashid on Twitter’, Twitter, 26 April 2019, <https://twitter.com/HHShkMohd/status/1121785842588995585>.

their network as complementary and intertwined with the BRI'.¹⁷⁶ This perception was given fuel by the 2015 establishment of a USD 10 billion UAE–China Joint Investment Fund. This has enabled the two powers to work in synergy in the Horn of Africa, as well as in the broader Middle East and South Asia.¹⁷⁷

Despite seemingly overlapping Interests in ports and infrastructures, there is a lack of genuine cooperation between China and the UAE in the Horn.¹⁷⁸ In Ethiopia, both countries vie for the logistics sector. In 2018, the DP World chairperson, Sultan Ahmed bin Sulayem, announced company intentions to develop infrastructure in Ethiopia; namely, in Dire Dawa, where most goods transit from Berbera.¹⁷⁹ In the same year, the UAE suggested it would build an oil pipeline connecting the Port of Assab in Eritrea to Ethiopia to allow for exports in the future,¹⁸⁰ although this plan remains far from implementation. Elsewhere and also in 2018, the Beijing takeover of the formerly Emirati-run Doraleh container terminal in Djibouti led DP World to file a lawsuit at the high court of Hong Kong against the state-owned China Merchants Port Holdings over breach of its exclusive port agreement.¹⁸¹ The tussle between these two state-backed companies is illustrative of the complementary and competitive nature of Emirati and Chinese intentions in the region. A security adviser to the UAE government sums up this way:

The BRI is important. It is yet to be seen what the fallout of the pandemic is but we work closely with China, a major player in Africa and globally. We are not competitors in the Horn. Our population is not one Chinese city. We have qualitative propositions in the region but China is China. We hope to benefit from mutual cooperation. Having said that, the USA is our primary security partner and ally outside of the region.¹⁸²

The BRI is also an opportunity for Riyadh. According to some interviewees, Saudis have been increasingly mindful of the many possibilities offered by China. As one commentator notes, 'Rather than putting all their eggs in one basket [the United States]', they realize 'that there are other opportunities'.¹⁸³ This is exemplified by King Salman's Asian tour in 2017.

176 Interview with Gulf expert, 11 August 2020.

177 Young, 'Gulf Financial Aid and Direct Investment', 7.

178 Interview with Camille Lons, 11 August 2020.

179 See Media Saxafi, 'DP World Eyes Dire Dawa For Logistics Development', 15 October 2018. <https://saxafimedia.com/dp-world-eyes-dire-dawa-logistics-development/>

180 Maggie Fick and George Obulutsa, 'UAE Plans Oil Pipeline from Ethiopia to Eritrea in Latest Horn of Africa Move', *Reuters*, 10 August 2018, <https://www.reuters.com/article/us-ethiopia-eritra-pipeline-idUSKBN1KVOVS>.

181 'ضارتقالاىلع-انتردقبا-اررض-قحلي-يتوبيج-عم-عازنلالا-يبدئاوم', [Dubai Ports: The Dispute with Djibouti is Damaging Our Ability to Borrow], *Al-Arabiya*, 20 May 2020, <https://www.alarabiya.net/ar/aswaq/companies/2019/10/22/ضارتقالاىلع-انتردقبا-اررض-قحلي-يتوبيج-عم-عازنلالا-يبدئاوم>.

182 Interview with a security adviser to UAE government, 25 August 2020.

183 Interview with Gulf expert, 20 August 2020.

Ultimately, however, Saudi Arabia is considered a less reliable partner than the UAE for the Chinese.¹⁸⁴ In contrast, the UAE is much more proactive in attempts to attract Chinese investments. Arguing that ‘the BRI in the Horn of Africa is becoming increasingly a way for the Gulf states to prove themselves as valuable partners’¹⁸⁵ seems more the case for the UAE and less so for Saudi Arabia. Indeed, as one observer asserts, the Saudis ‘are absolutely not welcoming any Turkish or Iranian, or even Chinese and Russian presence in the Red Sea of the Horn of Africa’.¹⁸⁶

Overall, given the connections between individual, state and economic agendas in the Gulf states, it is difficult to envision a stable partnership emerging with China on BRI-related projects in the Horn of Africa. Instead, continued competition likely suits the interests of the governments in the Horn of Africa, both those with port assets seeking investment and in Ethiopia, which is seeking internal investment in logistical infrastructure and industry, as well as markets for growing exports. States in the region have decades of experience in leveraging external interest to further their domestic and regional goals.

184 Interview with Gulf expert, 25 August 2020.

185 Elisabeth Dickinson, comment during event, ‘Red Sea Rivalries: Middle East Competition in the Horn of Africa’, United States Institute of Peace, 20 September 2019. <https://www.usip.org/events/red-sea-rivalries-middle-east-competition-horn-africa>

186 The Arab Gulf States Institute in Washington, Competition or Cooperation: *The Horn of Africa and Broader Red Sea Basin at a Crossroads*, 2020. <https://www.youtube.com/watch?v=B74wfTmyLHs>

Donor and humanitarian engagement

In addition to conventional investment activity, which is often promoted through government incentives, the Gulf states and Turkey are seeking to expand their influence in the Horn of Africa through development and humanitarian engagement. This comes in different forms but these approaches may be usefully contrasted with Western development and humanitarian agendas in the Horn of Africa region.

Turkish humanitarian diplomacy and soft power projection

Ankara believes that fostering people-to-people relations and tools will ultimately bring strategic and material gains.¹⁸⁷ Consequently, the Turkish strategy in the Horn of Africa is to revive elements of the second phase of its opening towards Africa, which focuses on humanitarian efforts and public diplomacy. These operate in support of three main objectives: 1) to build a role as a global player; 2) to increase business volume; and 3) to counter the propaganda promoted by the Gülen movement.¹⁸⁸ To pursue these objectives, Turkish policymakers are aware that soft power tools are needed more than anything else.

According to several interviewees, there is a wide misrepresentation of the Turkish role in the African context.¹⁸⁹ While Turkey is often portrayed as a rival power to the UAE and Saudi Arabia in the Horn of Africa (and more widely), Turkish ambitions transcend this regional context. Turkish policymakers consider their country as a rising power, comparable to other international emerging players such as India. In a delicate transitional phase towards a new global order, Turkey is seeking its role both in the international hierarchy and in global governance.¹⁹⁰

As with all emerging powers, Turkey has adopted a status-seeking policy, identifying humanitarian diplomacy as a niche sector in which it can distinguish itself. Investment and efforts in the humanitarian sector contribute to narrowing the gap with other international competitors that are more powerful in terms of economic and military capabilities. The Turkish humanitarian intervention structure is simple: It reduces the distribution chain to the direct passage of support from donor to beneficiary without

187 Interview with Maarif Foundation employee, 3 September 2020.

188 Federico Donelli, *Turkey in Africa. Turkey's Strategic Involvement in Sub-Saharan Africa*, London: I.B. Tauris. (forthcoming)

189 Interview with think tank expert on Turkish security, 29 August 2020; interview with Turkish scholar on Africa and MENA region, 31 August 2020.

190 Interview with former Turkish diplomat, 23 August 2020.

intermediation.¹⁹¹ This practice raises many doubts among practitioners but it has had great success among African populations.¹⁹² In quantitative terms, Turkish aid is not greater than that of other donors but the impact of this aid on people is direct and tangible. As is evident in Somalia, the Turkish approach is much more direct and less bureaucratic, which has allowed for greater efficiency and rapidity in project development.¹⁹³ This fosters the positive perception of African communities.¹⁹⁴

Furthermore, Turkey presents itself and feeds its image as a power that operates in a completely different way from other extra-regional actors.¹⁹⁵ It has the advantage that it does not have a colonial past. The Ottoman period, which could prompt doubts and criticism, has been reinterpreted in a positive light as evidence of long-lasting historical ties. Similarly, neo-Ottoman rhetoric is exploited in the African context as anti-colonial and anti-imperialist discourse.¹⁹⁶ Turkey has played the card actively to build a positive image in the eyes of African peoples, and to consolidate trust with the elites and constituencies of the countries through humanitarian assistance and populist public statements.¹⁹⁷

The Turkish humanitarian sector commitments reflect a twofold need. First, it reflects the quest to gain international visibility. Second, it reflects the need to nurture the relationships established between the AKP government and Turkish civil society actors, particularly entrepreneurs and conservative NGOs. The concept of humanitarianism (*İnsaniyetçilik*) that links state and non-state actors on the ground seems to be a synthesis of the traditional approach to humanitarian aid and deep religious meaning (Islamic humanitarianism).¹⁹⁸ In other words, the value that Islam assigns to charity constitutes the ideological glue of the nexus between state and civil society.¹⁹⁹ The Turkish humanitarian approach is therefore characterized by religion. Turkey predominantly but not exclusively (Tanzania and Ethiopia are notable exceptions) focuses on Muslim majority countries because they are easier to deal with (due to cultural proximity) and more justifiable in the eyes of the Turkish public, especially the conservative AKP constituency.²⁰⁰ Confessional affinity allows Turkish governmental and non-governmental agencies²⁰¹ to

191 Haşimi Cemalettin, 'Turkey's Humanitarian Diplomacy and Development Cooperation', *Insight Turkey* 16/1 (2014); Federico Donelli, 'Features, Aims and Limits of Turkey's Humanitarian Diplomacy', *Central European Journal of International and Security Studies* 11/3 (2017); Bülent Aras, 'Medical Humanitarianism of Turkey's NGOS: A "Turkish Way"?', *Alternatives: Global, Local, Political* 42/4 (2017); Meliha Benli Altunısık, 'Turkey's Humanitarian Diplomacy: The AKP Model', CMI Brief, Bergen: Chr. Michelsen Institute, 2019.

192 Interview with researcher on MENA region, 20 August 2020. Interview with researcher on MENA region, 20 August 2020.

193 Interview with researcher on Turkey and Africa region, 23 August 2020.

194 Interview with scholar of African Studies, 22 August 2020.

195 Interview with NGO worker, 21 August 2020.

196 Mark Langan, 'Virtuous power Turkey in sub-Saharan Africa: the 'Neo-Ottoman' challenge to the European Union', *Third World Quarterly* 38/6 (2019).

197 Interview with researcher on Turkey and Africa region, August 2020.

198 Alpaslan Özerdem, 'İnsaniyetçilik ve Türk Dış Politikası', *Uluslararası İlişkiler* 13/52 (2016).

199 Interview with Turkish scholar on Africa and MENA region, 31 August 2020.

200 Interview with TRT analyst, Africa desk, 22 August 2020.

201 On the nexus between AKP government and conservative Turkish NGOs, see: Nihat Çelik and Emre İşeri, 'Islamically oriented humanitarian NGOs in Turkey: AKP foreign policy parallelism', *Turkish Studies* 17/3 (2016).

better integrate with the local population by establishing relations on a mutual basis. From the Turkish perspective, the religious element helps boost the image of a country that positions itself in a horizontal way as a partner to Horn of Africa countries.²⁰² There is, however, an evident mismatch between rhetoric and practice. That is, despite intentions and statements, the Turkish people involved in humanitarian activities tend to have a saviour-like approach.²⁰³

The Turkish humanitarian intervention framework mirrors the nexus between the state and civil society. Several NGOs (mainly faith based), including the Human Relief Foundation (İHH), Yeryüzü Doktorları, Dost Eli Foundation, Türkiye Dyanet Foundation, Deniz Feneri, Sema Foundation and Cansuyu, are involved in humanitarian activities and are boosting both the quality and quantity of Turkish humanitarian assistance. A notable commitment is also provided by the Turkish Red Crescent (Kızılay), the largest charity in the country. The constant presence of TİKA on the ground has allowed for the development of a cooperative engagement, as in the case of the Africa Cataract Campaign initiated by TİKA and İHH, which culminated in the opening of several cataract surgery centres. Similar projects have been initiated by TİKA and several other NGOs, such as Doctors of Hope and the Kimse Yok Mu aid foundation—affiliated with the Gülen movement. All these projects provide free health check-ups, circumcisions, cataract surgeries, and free medicines and medical supplies to African people. All the efforts and actions of these stakeholders are coordinated from Ankara and on the ground by TİKA.

Although these humanitarian efforts aim to gain international exposure and credibility, and to achieve support within international organizations, they are also interlinked with the second Turkish strategic priority of increasing the presence of Turkish companies on the continent. Turkey seeks to gain priority in the exploitation of energy resources in the Horn of Africa and to position Turkish enterprises at the top in terms of obtaining significant public contracts with huge financial implications, notably in the domain of infrastructure.²⁰⁴ Economic relations between Turkey and the Horn of Africa are growing but compared to total trade with Africa, this seems to be weaker than elsewhere on the continent: The top two Turkish trading partners are still South Africa and Nigeria. Yet, there are strong prospects for the growth of economic ties with the Horn because of the economic potentials of this area. In particular, Somalia can be an important hub for Turkish business on the continent.²⁰⁵ Among private companies, an important share of Turkish business in Africa is carried out via large conglomerates such as Koç (the largest Turkish group involved in energy, insurance and banking), Sabancı (cement, energy, banking, telecommunications and textiles), and Doğan or Doğuş (banking, construction and tourism). Nonetheless, small-to-medium enterprises are increasingly acquiring influence and market shares as a result of both their growing importance to the Turkish economy and tighter ties with Turkish politicians. Finally, the Horn of Africa

202 Federico Donelli, 'The Ankara Consensus'.

203 Interview with TRT analyst, Africa desk, 22 August 2020.

204 Interview with researcher on Turkey and Africa region, 23 August 2020.

205 Interview with staff member, Africa Foundation, 24 August 2020.

is an important market for the export of military hardware, a sector in which Turkey has invested heavily in recent years.

Gulf humanitarian and donor engagement

Gulf donor organizations are increasingly important players in the humanitarian landscape in the Horn of Africa. In particular, the UAE is an increasingly significant presence in multilateral humanitarian organizations. The 2009 establishment of the UAE Office for the Coordination of Foreign Aid is a clear attempt to enhance its international credentials as a reliable, regular and transparent donor.²⁰⁶

The Horn of Africa has been a site of international humanitarian engagement for decades, due to its large populations of internally displaced persons and refugees, and recurrent food security challenges. As such, the humanitarian sector has presented Gulf states with an additional entry point for their engagement in the Horn of Africa. At the same time, transactional diplomacy continues to be relevant for understanding the impact of Gulf state in the Horn of Africa.

Engagement in Sudan offers a clear example. On top of the USD 3 billion pledged by Saudi Arabia to Sudan after the removal of then President Omar Hassan al-Bashir in 2019, the UAE pledged further funds through the World Bank–World Food Programme initiative. This exemplifies a trend among Gulf donors to channel more money through multilateral mechanisms in order to benefit from association with higher levels of international legitimacy. From a Gulf perspective, however, until multilateral institutions are more willing to accommodate the development priorities of the Gulf states, as well as more willing to accept Gulf development actors as partners, use of multilateral donor instruments will remain limited. The governor of the UAE central bank sums up the situation in his response to an IMF request for extra funds in 2009: '[We] will not be providing funds without extra voice and extra recognition'.²⁰⁷ This may also reflect the Emirati stance on humanitarian aid to multilateral organizations.

Over the past two decades, and especially since the Arab Uprisings, Dubai has sought to position itself as a key player in the global humanitarian architecture, particularly through the expansion of the International Humanitarian City (first established in 2003), which is now the largest humanitarian hub in the world, marketing itself in terms of its pivotal geographical location and its proximity to key financial backers in the UAE.²⁰⁸ The rapid expansion of Dubai in the humanitarian sphere also parallels the UAE's increasingly interventionist foreign policy, which is directed towards 'efforts to tackle religious

206 Debra Shushan and Christopher Marcoux, 'The Rise (and Decline?) of Arab Aid: Generosity and Allocation in the Oil Era', *World Development* 39/11 (2011).

207 Deniz Gökalp, 'The UAE's Humanitarian Diplomacy: Claiming State Sovereignty, Regional Leverage and International Recognition', CMI Working Paper, Bergen: Chr. Michelsen Institute, 2020. <https://www.cmi.no/publications/7169-the-uaes-humanitarian-diplomacy-claiming-state-sovereignty>.

208 In 2015, the DIHC was consolidated under Mohammed Bin Rashid Al Maktoum Global Initiatives, which constituted a new umbrella organization to coordinate broader efforts to improve the Arab world through humanitarian, community and development work.

fundamentalism and Iranian influence and to promote security, stabilization and reconstruction in war zones where the UAE security forces are in coalition or coordination with the US-led international coalition forces'.²⁰⁹ Abu Dhabi is the main driver of overall Emirati foreign policy, especially since the negative impacts of the 2008 global financial crisis on Dubai's economy.

Beyond this twinning of humanitarian relief with military intervention, the conditionalities underpinning UAE engagement also rest on two expectations of recipient countries.²¹⁰ First, aid recipients are required to open their markets to state-led investment. Market expansion is an explicit goal of UAE humanitarianism and the return on investment rhetoric is central to state discourses around development assistance, whether this is market access, the establishment of profitable partnerships for future investment or market domination to keep other Gulf competitors out. Second, aid recipients are expected to adopt the Emirati brand of secular Islam. Since the Arab Uprisings, Gulf donors have shifted from giving small-scale humanitarian aid to giving large-scale grants designed to stabilize economies and support struggling governments, thus ultimately hoping to prevent further crises in the region.²¹¹

The UAE effort to monopolize the humanitarian logistics sector is arguably a politically driven attempt to bolster the UAE reputation as a stable commercial hub and altruistic nation, while providing the country with conduits into new markets and political opportunities—neither being angles the Emiratis are likely to deny.²¹² Serving as a logistics hub for commercial, humanitarian and military products enables each strand to reinforce the other. For example, the majority of humanitarian aid from the UAE to Yemen (where UAE is the largest donor) is concentrated in two areas: 1) minimizing the negative publicity of the UAE and Saudi forces after they blockaded Yemeni ports; and 2) rebuilding transport infrastructures to bolster port capacity and connect these back to the UAE for future economic and political gain. As one commentator points out, 'By framing the reconstruction of Yemeni ports and their tighter linkages to the UAE as aid, the UAE is set to powerfully shape post-conflict trajectories in Yemen for years to come.'²¹³

Qatari official development assistance and charities

Each Gulf state is pursuing a slightly different humanitarian identity, oriented as much towards domestic agendas and appeasing Western states as towards winning

209 Gökalp, 'The UAE's Humanitarian Diplomacy'.

210 Karen Young, 'A New Politics of GCC Economic Statecraft: The Case of UAE Aid and Financial Intervention in Egypt', *Journal of Arabian Studies* 7/1 (2017).

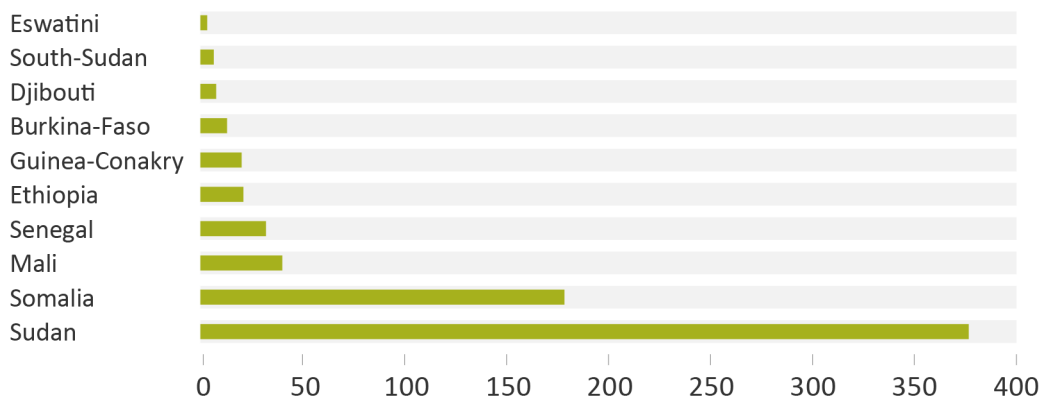
211 Sutan Barakat, 'Priorities and challenges of Qatar's Humanitarian Diplomacy', CMI Brief no. 2019: 07, Bergen: Chr. Michelsen Institute, 2019, <https://www.cmi.no/publications/6906-priorities-and-challenges-of-qatars-humanitarian-diplomacy>

212 Rafeef Ziadah, 'Circulating Power: Humanitarian Logistics, Militarism, and the United Arab Emirates', *Antipode* 51/5 (2019): 1684–1702.

213 Ziadah, 'Circulating Power'.

favour among governments in the Horn of Africa. Qatar has opted for an identity as a humanitarian peacemaker, with a commitment to conflict mediation enshrined in its 2003 constitution. Its financial autonomy and independence from regional consensus-led humanitarian agendas has enabled it to undertake higher risk conflict interventions, which have for the most part been positively received by Western multilateral institutions.²¹⁴

Figure 7. **QFFD development projects and initiatives in African-targeted countries (2017/2019–2020) (USD million)**



Source: Compiled from Qatar Fund for Development's Annual Reports 2016, 2017, 2018, 2019.

Unlike the UAE, Qatar has increased its contribution to multilateral humanitarian organizations much more quickly over the past few years, particularly after the blockade. In 2017, 43 per cent of Qatari disbursements were made through multilaterals.²¹⁵ In 2018, Qatar signed the 'QC4HCR' agreement with the UNHCR to expand opportunities for partnership, collaboration and coordination between Qatar Charity and the UNHCR²¹⁶ and it is very publicly channelling funds (albeit quite small amounts) through other UN bodies; for example, UNICEF.²¹⁷ Qatar also remains a significant player in terms of its bilateral assistance in the Horn of Africa. Data from 2017–2019 provided by the Qatari Fund for Development (QFFD), the main official development assistance agency, shows that among targeted countries in sub-Saharan Africa, Sudan and Somalia are top recipients

214 Barakat, 'Priorities and challenges of Qatar's Humanitarian Diplomacy'.

215 Barakat, 'Priorities and challenges of Qatar's Humanitarian Diplomacy'.

216 Qatar Charity, 'Qatar Charity, UNHCR launch 'QC4HCR' initiative to coordinate cooperation', Press Release, 12 April 2018, <https://www.qcharity.org/en/qa/news/details/15032-qatar-charity%2c-unhcr-launch>

217 UNICEF, 'UNICEF and Qatar Charity Announce new partnership on World Refugee Day', Press Release, 20 June 2020, <https://www.unicef.org/turkey/en/press-releases/unicef-and-qatar-charity-announce-new-partnership-world-refugee-day>.

of Qatari aid (see Figure 7). In 2017, for example, a (roughly) USD 200 million package was agreed by Qatar for development initiatives in Somalia.²¹⁸

Between 2010 and 2012, Eritrea and Djibouti ranked number 8 and number 10, respectively, in the top 10 recipients of Qatari official development assistance.²¹⁹ Between 2012 and 2017, Qatar was also the main Arab aid donor to Sudan. The Gulf crisis has presumably hindered humanitarian and aid initiatives supported by Doha.²²⁰ Nevertheless, Sudan still remains the primary target for Doha in sub-Saharan Africa. The Doha peace initiative in Darfur has been skilfully coupled with post-conflict reconstruction efforts. Improving local socio-economic conditions is seen as a way to enhance diplomatic and political gains. This approach was exemplified somewhat by Ahmed bin Abdullah Al-Mahmoud, a Qatari diplomat, who chaired both the implementation follow-up commission of the Doha Document for Peace in Darfur (DDPD), and the Darfur Reconstruction and Development Board—until 2017.

In 2016, eight QFFD projects were underway in Darfur—out of a total of 15 in sub-Saharan Africa.²²¹ In 2017–2018, the QFFD approved a USD 70 million package for a second set of development and reconstruction initiatives in Darfur.²²² Beyond development assistance, Qatar long supported Bashir's regime with substantial lifelines. In 2012–2013, for example, Qatar vowed to acquire USD 2 billion in Sudanese multi-sector treasury bonds to bail out Khartoum, which was in dire economic difficulties in the aftermath of South Sudanese independence in 2011.²²³

218 The package includes: the construction of the 30 km Mogadishu–Afgoi road and the 90 km Mogadishu–Jowhar road, the building of the prime minister, the rebuilding of the premises of the ministry of planning, investment and economic development, the rehabilitation of the Mogadishu municipality building and the rehabilitation of the diplomatic institute building. See: 'Qatar Fund for Development Supports Somali Economy', Qatar Fund for Development, 29 November 2017, <https://qatarfund.org.qa/en/qffd-supports-somali-economy/>.

219 Homi Kharas, 'Trends and Issues in Qatari Foreign Aid', working paper, Doha, Qatar: Silatech, November 2015, 9.

220 'The Politics of Gulf Aid to Sudan', Arab Gulf States Institute, 22 September 2020, <https://agsiw.org/the-politics-of-gulf-aid-to-sudan/>.

221 Qatar Fund for Development, 'Qatar Fund for Development Annual Report 2016' (QFFD, 2016), Doha: Qatar Fund for Development, 2016, 22–23, <https://qatarfund.org.qa/wp-content/uploads/2018/03/QFFD-Report-English.pdf>.

222 The first set of projects stretched from 2012 to 2017.

223 'Intelligence Brief: Qatari Aid, Finance and Foreign Policy in Sudan', Open Briefing, 21 February 2014, <https://www.openbriefing.org/docs/Qatari-aid-finance-and-foreign-policy-in-Sudan.pdf>.

Soft power: Cultural diplomacy and diaspora networks

Cultural diplomacy is a growing feature of Turkish influence in the Horn of Africa, with perceptions in the region that this creates a comprehensive approach to the Turkish agenda. Aid and investment projects tend to involve more interaction between Turkish and host country staff, and connections are reinforced by Turkish language training and scholarship programmes that bring Horn of Africa nationals to Turkey before returning to the region. Turkey also has a growing Horn of Africa diaspora population at a time when the Gulf states are struggling with their migration management policies, despite a long history of labour movement between the Horn and the Gulf. In terms of soft power, restrictive and sometimes abusive migration policies in the Gulf breed resentment in the Horn of Africa, especially when these coincide with periodic waves of expulsion. The COVID-19 epidemic has added strain to this already fraught relationship.

Horn of Africa diasporas in Saudi Arabia, the UAE and Qatar

The presence of a substantial Horn of Africa diaspora across the Gulf states dates back decades and reinforces long-standing cultural and economic linkages between the two regions across the Red Sea. Saudi Arabia and the Emirates host significant Horn diasporic communities, especially from Ethiopia, Eritrea, Sudan and Somalia. For the most part, however, it is difficult to obtain reliable and accurate data on diaspora populations because of limitations associated with Gulf national data but some estimates are presented in Table 5.

The 100,000-strong Somali diaspora in the Emirates—mostly present in Dubai—plays a significant role in the domestic economy of Somalia. Following the downfall of President Siad Barre in 1991, the UAE lured Somali businesses and the trade community at large to its shores. Today, Dubai banks process remittances from Somali diasporas worldwide. Seventy per cent of the Somali community in Dubai own import-export businesses between the two countries, which contribute to Somali GDP.²²⁴ While the Somali diaspora in Saudi Arabia is slightly less substantial than in the UAE, there is also a sizeable Somali community with business dealings with other communities throughout East Africa and the Horn of Africa.²²⁵

224 Abdi A Tawane, 'What the Gulf Crisis Means for Somalia', *International Policy Digest*, 18 April 2018, <https://intpolicydigest.org/2018/04/19/what-the-gulf-crisis-means-for-somalia/>.

225 'Djibouti Country Statement: Addressing Migrant Smuggling and Human Trafficking in East Africa', *Expertise France*, September 2017, 11.

Table 5. *Estimates of Horn diasporic communities in Saudi Arabia, the UAE and Qatar*

	Djibouti	Ethiopia ²²⁶	Eritrea	Kenya	Sudan ²²⁷	Somalia ²²⁸
Saudi Arabia	-	400,000–500,000 (2018)	100,000 ²²⁹ (2018)	6,900 (2014)	400,000–500,000	20,000–100,000 (2014)
UAE	-	90,000–100,000 (2018)	3,000–17,500 (2013) ²³⁰	40,000 (2014)	75,000	70,000–100,000 (2014)
Qatar ²³¹	Presumably very limited	22,000 ²³² –25,000 (2018)	10,000 (2016)	30,000 (2019)	58,000–60,000 (2019)	limited ²³³

Source: Various sources cross-checked with data from the Gulf Labour Markets and Migration (GLMM); see: <https://gulfmigration.org/>

The Eritrean diaspora is significant in Saudi Arabia but much less in the UAE. Some out-dated figures suggest that the number of Eritrean workers has significantly increased over the last decade, especially in Saudi Arabia. Over the 1991–2009 period, the Eritrean diaspora allegedly ranged from 6,000 to 15,000 individuals in the kingdom, with around 2,400–3,000 Eritreans in the UAE over the same time span.²³⁴ In 2020, there were approximately 100,000 Eritreans in Saudi Arabia and up to 17,500 in the UAE.²³⁵ Because the Gulf states largely sympathized with the Eritrean Liberation Front (ELF) from the 1960s, Riyadh granted a number Eritreans residency in the kingdom.²³⁶ Considered as cheap unskilled labour (never refugees), most female migrants work as housemaids.

226 Will Todman, 'The Gulf Scramble for Africa: GCC States' Foreign Policy Laboratory', CSIS Briefs, Washington, DC: Center for Strategic and International Studies, 20 November 2018, <https://www.csis.org/analysis/gulf-scramble-africa-gcc-states-foreign-policy-laboratory>.

227 Some observers estimate the Sudanese diaspora to be as large as 900,000 individuals; see, Asteris Huliaras and Sophia Kalantzakos, 'The Gulf States and the Horn of Africa: A New Hinterland?', *Middle East Policy* 24/4 (2017), 69.

228 Dianna Shandy and Shobha Das, 'Diaspora Engagement and the Global Initiative on Somali Refugees--Emerging Possibilities', Geneva: United Nations High Commissioner for Refugee, 2016.

229 Todman, 'The Gulf Scramble for Africa'.

230 Antony Otieno Ong'ayo, 'Diaspora Transnational Activities and Home Country Regime Conditions: Obstacles to Eritrean Diaspora Contribution to Local Development in Eritrea', Utrecht: International Development Studies, Utrecht University, 2015.

231 Except where otherwise noted, figures for Qatar are drawn from Jure Snoj, 'Population of Qatar by Nationality in 2019', Priya DSouza Communications, 15 August 2019, <https://priyadsouza.com/population-of-qatar-by-nationality-in-2017/>.

232 'Ethio-Qatar Business Forum Held in Doha', *Ethiopian News Agency*, 4 February 2020, <https://www.ena.et/en/?p=12305>.

233 Interview with Gulf expert, 21 September 2020.

234 Abbebe Kifleyesus, 'Women Who Migrate, Men Who Wait: Eritrean Labor Migration to the Arab Near East', *Northeast African Studies* 12/1 (2012), 104.

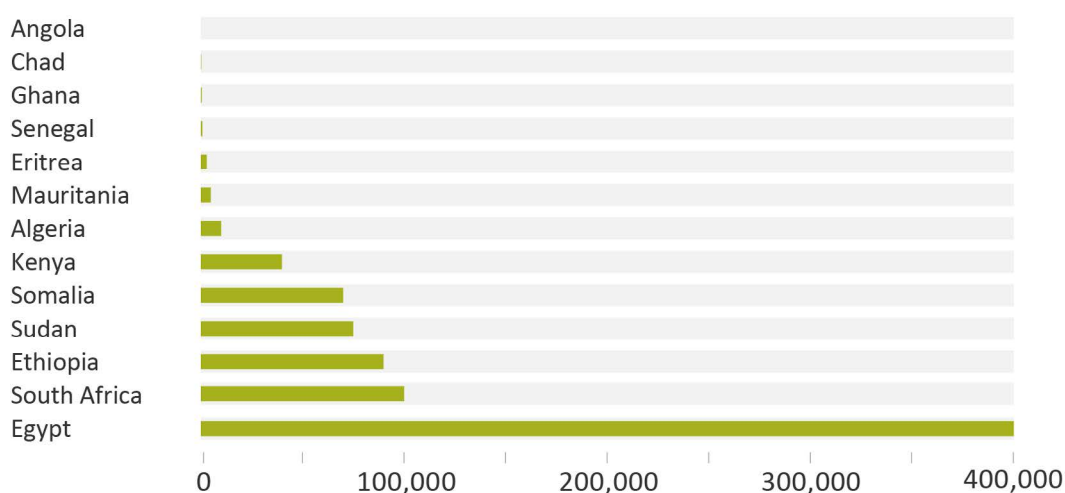
235 Otieno Ong'ayo, 'Diaspora Transnational Activities'.

236 Nicole Hirt and Abdulkader Saleh Mohammad, 'The Lack of Political Space of the Eritrean Diaspora in the Arab Gulf and Sudan: Torn Between an Autocratic Home and Authoritarian Hosts', *Mashriq & Mahjar Journal of Middle East and North African Migration Studies* 5/1 (2018): 106.

Males supply the services industry. They all presumably ‘face pressure to send private remittances to their relatives’,²³⁷ which provides the national economy of Eritrea with critical foreign exchange (SAR and AED are both pegged to the dollar).

Since the independence of Gulf countries in the 1970s, Sudanese migrants have been associated with employment in the public sector (army, police, administration). Sudanese communities in Saudi Arabia and the Emirates are significant, especially in the kingdom, where some estimates indicate they reach 900,000. This is significantly higher than the most commonly cited figures (see Table 5).²³⁸ Diasporas from Ethiopia, Sudan, Somalia and Kenya are also among the largest African communities in the UAE (see Figure 8).²³⁹ These figures underscore the breadth of people-to-people ties between these countries and the Emirates.

Figure 8. *Most significant African diasporas in the UAE (2014)*



Source: ‘UAE: Estimates of Population Residing in the UAE by Country of Citizenship (Selected Countries, 2014)’, GLMM (blog), 17 December 2015, <https://gulfmigration.org/uae-estimates-of-population-residing-in-the-uae-by-country-of-citizenship-selected-countries-2014/>.

Diaspora remittances account for significant sources of revenues for home economies. Diasporic communities also foster investments and trade relationships. In this respect, ‘Investments [from the Gulf] have been facilitated by the returning Sudanese and Ethiopian diasporas, who frequently start businesses on their return, drawing on their Gulf connections to find business partners or investors.’²⁴⁰ A security adviser to the UAE government concurs that Emirati support in the region ‘goes beyond ports, remittances,

237 Hirt and Mohammad, ‘The Lack of Political Space’.

238 Huliaras and Kalantzakos, ‘The Gulf States and the Horn of Africa’.

239 ‘UAE: Estimates of Population Residing in the UAE by Country of Citizenship (Selected Countries, 2014)’, GLMM (blog), 17 December 2015, <https://gulfmigration.org/uae-estimates-of-population-residing-in-the-uae-by-country-of-citizenship-selected-countries-2014/>.

240 Donelli and Dentice, ‘Fluctuating Saudi and Emirati Alignment’, 135.

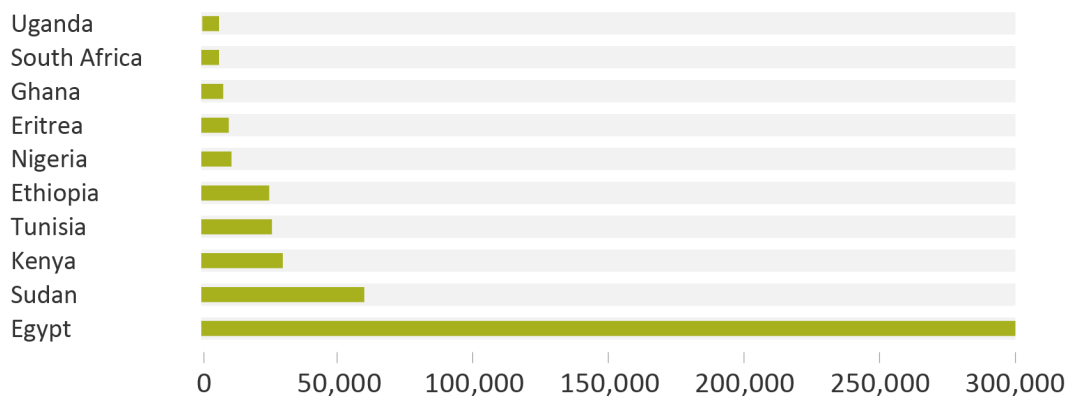
aid, and investment, with familial, religious and social ties, and Horn of Africa countries are part of the UAE social fabric. Sudanese and Somali especially'.²⁴¹ Unpacking these ties and connections is challenging, however, due to the lack of recorded data and limited transparency in the Gulf states.

Knock-on effects from low oil prices and the pandemic will undoubtedly have negative fallouts, especially given the high unemployment rate in Saudi Arabia. It is difficult to appraise how the COVID-19 pandemic will play out on diaspora workers, who may lose their jobs in large numbers, but these second-order effects may also impact relations between the two regions.²⁴² Alexander Rondos, EU special representative to the Horn of Africa, explains:

The very people at the source of remittances are the ones who are probably being hardest hit by the economic downturn by COVID. We've got to find a way and see if there is a way we could enhance how remittances keep coming back into this region. It is absolutely a game changer.²⁴³

The Sudanese, Kenyan, Ethiopian and Eritrean communities are among the largest diasporas in Qatar. As in other Gulf states, these communities are important sources of remittances back home. The COVID-19 pandemic has generated fear of foreseeable layoffs and repatriation, which would impact this significant source of hard currency in Horn countries.

Figure 9. **Top 10 African diasporas in Qatar**



Source: Jure Snoj, 'Population of Qatar by Nationality in 2019', Priya DSouza Communications, 15 August 2019, <https://priyadsouza.com/population-of-qatar-by-nationality-in-2017/>

Qatar is home to a sizeable and quite visible Sudanese community (see Figure 9). Sudanese tend to occupy positions at all levels of employment, working as security guards,

241 Interview with a security adviser to UAE government, 25 August 2020.

242 Interview with Gulf expert, 20 August 2020; interview with Gulf expert, 11 August 2020.

243 The Arab Gulf States Institute in Washington, Competition or Cooperation: The Horn of Africa and Broader Red Sea Basin at a Crossroads, 2020. <https://www.youtube.com/watch?v=B74wfTmyLHs>

taxi drivers and ‘all the way up to upper-middle-class positions in the medical industry as doctors’.²⁴⁴ The Sudanese diaspora also work in all labour market segments (public and private), including multinational corporations, NGOs, government organizations and ministries (as advisers and administrators), the police and army, and in agriculture.²⁴⁵ Consequently, ‘Over time, Sudanese people have managed to establish some sort of credibility’, especially in Qatar, where ‘they are very respected’.²⁴⁶ Qataris are ‘a little bit warmer to the Sudanese community [than in the UAE, for example]’, as this Sudanese man, who is in his thirties and grew up in the UAE and then Qatar, explains:

There are a lot of young entrepreneurial Sudanese ... who can rely on their relations with the Qataris they grew up and studied with to start a business. This is a proximity our parents did not have to locals [Gulf nationals] when they came here at an earlier time. ... Of course, many of these nationals can serve as silent partners, not actual investment partners per se.

In contrast, the Somali diaspora in Qatar is very small despite extensive relations between Doha and Mogadishu. Most Somalis are not even permanent residents. Nevertheless, as many from the Somali community in the UAE have moved to Turkey in recent years, Qatar might also benefit from this diaspora to push its interests forward in Somalia in light of the ties and similarities, if not least in perception, around the Turkey–Qatar axis.

Migration: Impact on relations between the Horn of Africa and the Gulf

Though economically beneficial, migration between the Horn of Africa and the Gulf states can cause political friction. Horn states accuse their Gulf counterparts of poor labour standards that encourage maltreatment. Arab states say governments in the Horn are not doing enough to stem illegal migration, which has risen significantly in the last two decades. Periodic crackdowns and expulsions of migrant workers have strained relations between the Gulf states and countries such as Ethiopia, Sudan and Somalia.²⁴⁷

Eritreans, Sudanese and Ethiopians are far greater in number in Saudi Arabia than in the UAE, which has contributed to further consolidating ties between Riyadh and these three East African countries. At the same time, the vulnerability of migrants in Saudi

244 Interview with a strategic marketing manager at Hilti in Qatar (construction industry), 28 September 2020.

245 ‘Doha to Host Qatari-Sudanese Economic Forum next Month’, *Qatar Tribune*, 7 December 2017, <http://www.qatar-tribune.com/news-details/id/100118>.

246 Interview with a strategic marketing manager at Hilti in Qatar (construction industry), 28 September 2020. In most cases, a local Gulf national is required to serve as a partner if a non-national wishes to set up a company in the Gulf region. The local national typically has a minimum 51 per cent share of the business. In many cases, however, Gulf nationals have no operational involvement or share per se but are paid an agreed fee to serve as the majority partner. The quoted material in the remainder of this section of the report is derived from this source.

247 Rashid Abdi, ‘A Dangerous Gulf in the Horn: How the Inter-Arab Crisis is Fuelling Regional Tensions’, Commentary, International Crisis Group, 3 August 2017, <https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/dangerous-gulf-horn-how-inter-arab-crisis-fuelling-regional-tensions>.

Arabia, and the many abuses they face in the kingdom, are widely and regularly criticized. For example, recent footage of horrific conditions experienced by Ethiopians at COVID-19 detention centres sparked outrage across the international community.²⁴⁸

Saudi Arabia and the Emirates seem to have a poor reputation in many African countries. In particular, African Union officials are very sceptical and jaded about the Gulf and this sense of mistrust is noticeable in the Horn of Africa.²⁴⁹ In Somalia, the UAE and Qatar 'are perceived as arrogant, which differs from Turkey's significant visibility and positive branding'.²⁵⁰ Another compelling example is the wrath and derisive attitude of Sudanese demonstrators towards Saudi and Emirati support for the military in 2019, in the aftermath of al-Bashir's fall. The perception among many Sudanese is that the Gulf states were only interested in propping up their allies in the Sudanese military and cared little for the fate of the Sudanese population at large.²⁵¹

As such, hard power and investments go hand in hand with the projection of soft power, which aims to win the hearts and minds of the populations. To a greater extent than Saudi Arabia, the UAE is adept at soft power initiatives and is 'known for using aid strategically'.²⁵² In fact, self-branding is a crucial part of the UAE strategy in reaching out to the international community. For example, alongside its commercial projects, Dubai-based DP World also invests in developmental projects, provides scholarships to promising local students and supports schools and universities.²⁵³

In addition, young people from Horn countries study in the Gulf; for example, at the King Fahd University of Petroleum and Minerals in Saudi Arabia, Sudanese students are the most represented (especially in medicine, energy studies, etc.).²⁵⁴ At Khalifa University in Abu Dhabi, there are quite a few Eritrean and Sudanese students (but none from Ethiopia or Somalia).²⁵⁵ In August 2020, in light of COVID-19, Sheikh Mohamed bin Rashid Al Maktoum, ruler of Dubai, launched an initiative to train 1 million medics, with many of these expected to come from developing countries, including Africa and Asia, with Horn countries likely to benefit from such initiatives.²⁵⁶

248 Will Brown and Zecharias Zelalem, 'International Condemnation Rains down on Saudi Arabia after Telegraph Investigation into Hellish Detention Centres', *The Telegraph*, 1 September 2020, <https://www.telegraph.co.uk/global-health/climate-and-people/international-condemnation-rains-saudi-arabia-telegraph-investigation/>.

249 Interview with Gulf expert, 11 August 2020.

250 Interview with Gulf expert, 12 August 2020.

251 Analysis of Sudan researcher.

252 Interview with two Gulf experts, 23 August 2020.

253 'DP World Berbera's Community Projects in Somaliland to Change Trajectory of Educational Opportunities', DP World, 18 December 2019, <https://www.dpworld.com/news/releases/dp-world-berberas-community-projects-in-somaliland-to-change-trajectory-of-educational-opportunities/>.

254 Interview with Gulf expert, 20 August 2020.

255 Interview with Gulf expert, 20 August 2020.

256 'UAE launches remote programme to train 1 million medics', *Dubai 92*, 12 August 2020, <https://www.dubai92.com/trending/uae/uae-launches-remote-programme-to-train-1-million-medics/>.

Turkish cultural engagement

From the beginning of its opening towards Africa, cultural diplomacy has been a central asset of Turkish policy. The involvement of non-state actors, in some cases before the involvement of governmental actors, has prepared fertile ground for the development of political and economic relations.²⁵⁷ As with humanitarian diplomacy, Turkish cultural diplomacy has built up around the civil society–state nexus and has developed along a double track. Track 1 consists of establishing both public and private schools. Public schools in Africa, or *Imam-Hatip*, are managed by the Directorate for Religious Affairs (DIB or *Diyanet*) and represent an exclusively Turkish educational system, wherein Islamic studies are combined with modern sciences.²⁵⁸ During the past two decades, *Imam-Hatip* have spread rapidly throughout the Horn of Africa.

Private Turkish schools in Africa have mainly been affiliated to the Gülen movement, with others associated to the Aziz Mahmud Hüdayi Foundation and *Suleymancılar*. Following the failed 2016 coup in Turkey, the Turkish education ministry enhanced the prerogatives of the Maarif Foundation, an agency that has progressively taken over Gülen movement schools in Africa.²⁵⁹ According to the Turkish state, the presence of Gülenist members or affiliates in Africa remains a matter of primary national security interest.²⁶⁰

Track 2 is spearheaded by the Turkish education ministry, with strong support from the culture and tourism ministry in the form of the Presidency for Turks Abroad and Related Communities (the YTB). The latter operates the main cultural diplomacy programme in Africa through its Türkiye scholarship programme, which enables African students to attend universities in Turkey.²⁶¹ Before they depart for academic life in Turkey, some African students take the language and cultural courses offered by Yunus Emre Enstitüsü, another public foundation based in Turkey, to become familiar with the Turkish way of life. During their four or five years of study in Turkey, African students also learn the Turkish language. At the end of their education, some students join the Turkish labour market, while others return to their country of origin, where they can find public or private positions.²⁶²

From an African perspective, the scholarships offer an alternative to the more complicated and often inaccessible paths to Western universities. From a Turkish perspective, the programmes are part of the long-term goal of increasing social backing in many African countries. The years of living in Turkey contributes to establishing a valuable network of people-to-people relations: Many African students who return to their

257 Interview with researcher on Turkey and Africa region, 23 August 2020.

258 These have proved to be very effective in bridging the gap between religious and scientific teaching. Conceived in a secular Kemalist environment, the *Imam-Hatip* offer a synthesis between traditional religious teaching and science-based Western style teaching.

259 Gabrielle Angey, 'The Gülen Movement and the Transfer of a Political Conflict from Turkey to Senegal', *Politics, Religion & Ideology* 19/1 (2018): 53–68; Federico Donelli, 'The Gülen Movement in Africa'.

260 Interview with foreign policy adviser who served within the Turkish minister of foreign affairs, 19 August 2020.

261 Currently, it is estimated that there are about 30,000 African students (mostly from Somalia and Sudan) in Turkey as a result of these study programmes.

262 Interview with staff member, Africa Foundation, 24 August 2020.

home countries become an integral part of the future ruling class, which is useful for facilitating economic and political relations with Turkey.²⁶³

In addition to the YTB scholarship programmes, there are a variety of other cultural diplomacy tools that Turkey uses in the Horn of Africa to increase Turkish popularity and presence.²⁶⁴ In addition to Turkish Airlines, with direct connections in all Horn countries, the use of television entertainment programmes, especially TV series (*dizi*) is increasing. As in other regional contexts (for example, the Balkans and the Middle East), Turkish television is constantly expanding in the Horn, except in Eritrea.²⁶⁵ Turkish television series are divided into two major narrative threads: Historical reconstructions of the Ottoman period or earlier, and life tales set in contemporary Turkey. While the former contribute to the process of re-elaborating Ottoman history, projecting an idealized image of the Turkish past,²⁶⁶ the latter allow the introduction of particularly sensitive social issues, and in some cases, genuinely taboo subjects. Although the expansion of Turkish television programming in Africa may simply appear to be a pop phenomenon, in reality this increases the visibility and branding of Turkey in the region, arousing curiosity and interest among African audiences.²⁶⁷ It is also likely that cultural diplomacy through the use of television series enhances the positive image of Turkey in the Horn of Africa.

Mirroring greater African interest in Turkey, there is also increased interest in Africa among the Turkish public. Over the last decade, Turkish media—Turkish Radio and Television (TRT), Anadolu Agency (AA), CCN Turk, newspapers, news websites—have increased news coverage of events in Africa, albeit only when these events involve or have a bearing on Turkey. At the same time, however, knowledge of the African continent, and more specifically of individual countries, is almost zero among the Turkish public; even among those working at state agencies or as volunteers at charitable foundations and NGOs involved in Africa, there is deep ignorance of the context in which they operate.²⁶⁸ At university level, knowledge of Africa is also still limited (except the North Africa). Inevitably, this lack of knowledge and understanding of context is a constraint for Turkish aims to further increase relations with the continent in the coming years.

263 Interview with Turkish scholar on Africa and MENA region, 31 August 2020.

264 Federico Donelli, 'Persuading through Culture, Values, and Ideas. The Case of Turkey's Cultural Diplomacy', *Insight Turkey* 21/3 (2019).

265 As of 2019, Eritrea is the only country in the Horn where Turkish TV series are not broadcast.

266 Murat Ergin and Yağmur Karakaya, 'Between neo-Ottomanism and Ottomania: navigating state-led and popular cultural representations of the past', *New Perspective on Turkey* 56 (2017): 333–359.

267 Interview with political economy scholar, 27 August 2020.

268 Interview with TRT analyst, Africa desk, 22 August 2020.

Conclusion

Relations between the countries in the Horn of Africa and their partners in the Gulf and wider Middle East are asymmetric in nature. While the Horn countries in focus for this study—Sudan, Ethiopia, Eritrea and Somalia—are relatively poor, politically volatile and affected by conflict, their partners across the Red Sea are comparatively wealthy, largely stable (at least internally) and increasingly asserting their positions as more proactive middle powers. For these middle power Gulf states, relations with global powers (principally the United States, the EU and China) remain their geopolitical priority. Nonetheless, expansion into areas such as the Horn of Africa, where they can assert their (growing) political, financial and military strength, has become increasingly important objective of foreign policy. Moreover, the gap left by diminishing US interest in the region over the last decade, coupled with the decades-long decline of the UK—the former colonial power—and the more hesitant role of China, particularly in Sudan, has created space for these new Gulf actors to re-assert their influence over a region where they have historically close cultural and economic connections.

The scale of resources brought to bear by Turkey and the Gulf states in their business and humanitarian ventures in the Horn of Africa is substantial. This does not, however, necessarily correspond to the priority given to the Horn of Africa by policymakers in Turkey and the Gulf. Motivated by security concerns, especially maritime security in the Red Sea and the western Indian Ocean, the Gulf states in particular consider the Horn of Africa as part of their near abroad and a natural area of influence, albeit one where their interests sometimes intersect with the agendas of global powers, such as the United States or China.

Horn of Africa agendas

These asymmetries are also reflected in the agendas of the states of the Horn of Africa in their region, and vis-à-vis the Gulf states and Turkey.

Sudan

Under the transitional government in Sudan since the overthrow of al-Bashir in 2019, there has been an effort to redefine Sudanese interest in the Nile and the Red Sea. Historically, Sudanese elites have perceived themselves as caught between the competing interests of Egypt and Ethiopia, and more recently, the Gulf states. On the question of the Nile, Sudan has taken a more assertive position, despite its fragile economic situation. The escalation of the border dispute with Ethiopia may signal a tougher stance more generally on negotiations over the GERD. This may not play into the interests of Egypt. Nonetheless, this more assertive Sudanese approach may result in a more astute

leveraging of competition for influence in Sudan in order to secure benefits for the country.

At the same time, this approach creates risks for Sudanese stability, especially if projects associated with different factions are competing for external support. At a minimum, for example, the situation presents a quandary for Saudi Arabia and the UAE, which have increased ties with Ethiopia but retain interests in supporting the Egyptian government. In the short term, Turkey and Qatar appear set to be marginalized in Sudan, despite significant influence before 2019. The rapprochement within the Gulf states in early 2021 also does not seem likely to result in cooperation between Qatar and the other Gulf states in the Horn of Africa in the short term.

Ethiopia

Internal stability in Ethiopia challenges the ability of the country to defend its interests in regional context. Under the leadership of Prime Minister Abiy Ahmed Ali since 2018, Ethiopia had been reorienting its regional security framework, in particular by restoring relations with Eritrea and increasing (at least rhetorical terms) cooperation between Asmara, Addis Ababa and Mogadishu. The conflict in Tigray, drawing in Eritrea and enflaming border tensions with Sudan, as well as exacerbating humanitarian concerns and straining relations with traditional donors to the country, has put additional strain on the fragile Ethiopian economy.

Tensions in the Nile basin also complicate relations with Saudi Arabia and the UAE, which have been increasingly helpful Ethiopian partners in terms of foreign investment and balance of payments support, both of which are under pressure from the global economic fallout of the COVID-19 pandemic. Given the importance of Cairo for Riyadh and Abu Dhabi, Ethiopia cannot rely on ready support from its Gulf partners. Economic and monetary volatility is also a concern for Turkey, which has substantial investments in industrial parks and logistics in Ethiopia. With elections due later in 2021, the internal contradictions in Ethiopia are coming to a head at a time when its external partnerships are in flux.

Eritrea

Asmara straddles a difficult position in regional dynamics in the Horn of Africa. Since its independence, the country has been exposed to pressure from much larger and better resourced neighbours, which has led to conflicts. Current Eritrean support to the Ethiopian government against the TPLF risks Eritrea being drawn into a long conflict on its southern border. Asmara managed to navigate the 2017–2021 Gulf states rift without severing its ties to Doha (despite tensions) but nevertheless remains caught between larger state agendas in the Nile basin and in the Red Sea.

The main agenda in Eritrea seems to be avoiding being overwhelmed by external pressures. Key among these pressures must be continued internal instability in Ethiopia and the intensification of conflict between Ethiopia and Sudan. Turkey and the Gulf states

have limited influence in Asmara. Cooperation with the UAE over the Emirati naval base in Assab is the most significant external security engagement in Eritrea.

Somalia

The federal government in Somalia is caught up in the latest dynamics of its transition towards a democratic constitutional order. The rapprochement in the Gulf states is unlikely to alter the short-term dynamics of external influence from Turkey and the Gulf states. Turkish relations with the federal administration in Mogadishu have weathered two handovers of power. Ankara is likely to be leveraging its connections to ensure a continued presence in the country. Given Turkish commercial and security engagements, as well as substantial humanitarian and cultural linkages (including direct flights to Istanbul), continued access seems likely, regardless of the outcome of the current constitutional stalemate.

The split in the Gulf states, with Doha retaining influence with President Farmajo's administration in Mogadishu and Abu Dhabi maintaining closer ties with the federal member states (especially Puntland, along with important ties to Somaliland) is set to continue. Qatari relations with Farmajo appear to be under some strain, however, in particular over reports that Doha financed the training of Somali fighters in Eritrea, as well as rumours that some of these fighters may have been deployed in Tigray with the Ethiopian military. The highly transactional and volatile dynamics of Somali politics have lent themselves to the pattern of Gulf state engagement. The incoming administration will likely face the same dynamics.

Turkish policy beyond the AKP?

A key question raised by the dynamics of the Turkish opening to Africa, especially since 2016 and the post-coup intensification of Turkish engagement, relates to the degree to which policy towards the Horn of Africa (or Africa more broadly) has been embedded in the AKP, rather than the institutions of the Turkish state. The AKP has dominated politics in Turkey for nearly two decades. Key players in the Turkish engagement in the region increasingly have links to the ruling party (and to some degree, specifically the circle around President Recep Tayyip Erdoğan). As such, there are questions as to the degree that relations between Turkey and the Horn of Africa will be affected in an eventual post-AKP landscape.

Sudan underscores the degree to which the integrated approach Turkey takes to commercial, diplomatic and cultural engagement fed into local perceptions of a clear agenda targeting the country as a priority, up until the revolution in 2019. This also came with assumptions about the connections between the AKP as an Islamist party analogous to then President Omar al-Bashir's Ingaz regime in Sudan, along with assumptions that the natural affinities between the two leaders helped reinforce Turkish engagement in the country. While this overstates the degree to which the AKP (or even the National Congress Party in Sudan) is an Islamist party, Sudanese perceptions stem from

the degree to which Turkish support for Sudanese business ventures and aid projects was streamlined by support from the government in Ankara. A backlash against the AKP that results in a change of power in Turkey might catch up with Turkish engagement in Africa. If not, the penetration of state institutions with AKP political appointments raises questions about capacity and experience in maintaining relations with the Horn of Africa for a future government.

Gulf states pivot: Middle power reactivity

As in Turkey, the COVID-19 pandemic has already brought fiscal challenges and some adjustment to the foreign policy agendas of the Gulf states, as hydrocarbon revenues, and tourism and airline traffic (both key earners) have taken a hit. Moreover, late 2020 brought a significant shift in terms of US engagement in the region, with President Joe Biden's win in the November presidential election, which saw Gulf states respond. The Trump administration had worked to reverse the approach the Obama administration had to Iran, aligning the US position more with the Saudi vision of Mohamed bin Salman and facilitating the assertive posture of the Saudi government in the region, including tacit (if inconsistent) US support for the Qatar embargo. The Biden administration has signalled both its intention to re-engage with Iran and its scepticism of Saudi security engagement, especially in Yemen.

In December 2020 and January 2021, the Gulf states adjusted to the new dynamics in Washington, one important upshot of which was the end of the Qatar embargo. Since 2017 when the Qatari embargo began, the rift it caused is one of the central cleavages that has shaped Gulf state engagements and competitions in the Horn of Africa. Since 2015, the Saudi security agenda has also sought to draw in Horn of Africa states. The prospect of cooperation between Riyadh and Doha in the Horn of Africa seems unlikely. Nonetheless, it could be that the prospect of lowered US–Iran tensions results in Riyadh putting more energy and resources into the development of the Red Sea Council as a platform to counter any Iranian agenda (perceived or real) in the region. Efforts to scale down the military operations in Yemen—which did not start as a theatre for Saudi–Iranian competition but evolved into this—could reinforce the need in Riyadh for the Red Sea Council agenda to move more quickly.

Glossary of acronyms, words and phrases

AAP	Africa Action Plan
AKP	<i>(Turkish) Adalet ve Kalkınma Partisi</i> (Justice and Development Party)
ATQ	Anti-Terror Quartet
AU	African Union
BRI	Belt and Road Initiative
DP World	Dubai Ports World
EPRDF	Ethiopian People's Revolutionary Democratic Front
FDI	Foreign Direct Investment
GCC	Gulf Cooperation Council
GERD	Grand Ethiopian Renaissance Dam
IGAD	Intergovernmental Authority on Development
<i>Imam-Hatip</i>	<i>(Turkish)</i> public schools
MbS	Mohammed bin Salman
ODA	Official Development Assistance
QIA	Qatar Investment Authority
QFFD	Qatari Fund for Development
QNB	Qatar National Bank
RSF	Rapid Support Forces
TİKA	Turkish Cooperation and Coordination Agency
TPLF	Tigray People's Liberation Front
TRT	Turkish Radio and Television
UAE	United Arab Emirates
YTB	<i>(Turkish)</i> Yurtdışı Türkler ve Akraba Topluluklar Başkanlığı (Presidency for Turks Abroad and Related Communities)

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Since around 2015, the importance of the Gulf states, particularly Saudi Arabia, the United Arab Emirates (UAE) and Qatar, in the affairs of countries in the Horn of Africa has been growing. At the same time, Turkey, which made a political choice nearly two decades ago to 'open towards Africa', has also strengthened its presence in the region. While the Horn of Africa is not the top foreign policy priority for the Gulf states or Turkey, its geographical proximity—part of the Gulf's 'near abroad'—means that the region demands consistent attention, particularly from a (maritime) security perspective.

Relations between the countries in the Horn of Africa and their partners in the Gulf and wider Middle East are asymmetric in nature. While the Horn countries in focus for this study—Sudan, Ethiopia, Eritrea and Somalia—are relatively poor, politically volatile and affected by conflict, their partners across the Red Sea are comparatively wealthy, largely stable (at least internally) and increasingly asserting their positions as more proactive middle powers. For these middle power states, relations with global powers remain their geopolitical priority. Nonetheless, expansion into areas such as the Horn of Africa, where they can assert their (growing) political, financial and military strength, has become an increasingly important objective of foreign policy.

The scale of resources brought to bear by Turkey and the Gulf states in their business and humanitarian ventures in the Horn of Africa is substantial. This does not, however, necessarily correspond to the priority given to the Horn of Africa by policymakers in Turkey and the Gulf. For countries in the Horn of Africa, the growing involvement of these more powerful, wealthier powers in their economies and foreign relations has offered opportunities—although not without some risks—to drive domestic (or personal) agendas, and to continue a long history of avoiding capture by those of global powers.

