



NOVEMBER 2023

## The European Union in a crowded Horn of Africa

This policy brief explores the engagement of the European Union (EU) in the Horn of Africa, in light of the growing regional presence of other foreign actors, namely the United Arab Emirates (UAE), Saudi Arabia, Qatar, Turkey, China, and Russia. Although the EU has defined the Horn as a “geo-strategic priority”, the bloc’s approach to the region is not yet well defined. The EU’s engagement would benefit from a clearer definition of the EU’s interests and objectives in the region in a clear order of priority. This could then inform a reflection on which tools can be best mobilized to achieve such interests. In this regard, the EU’s development cooperation efforts are an important added value that the bloc brings to the region, which may be leveraged more strategically to achieve the EU’s objectives.

The growing presence of other foreign actors in the Horn has important implications not only for the Horn itself, but also for the EU’s regional engagement. When the interests of some of these actors overlap with those of the EU, a degree of cooperation would be beneficial for all sides. The domains of infrastructure development and humanitarian aid offer a meaningful entry point to explore such cooperation. In other instances, on the other hand, the EU may need to push back on the activities of other foreign actors when they directly run against the bloc’s interests. Overall, however, the EU should be careful not to allow geopolitical considerations to guide its approach towards the region. Rather than being preoccupied with keeping the Horn’s stakeholders outside of the orbit of its geopolitical rivals, the EU should focus on deepening ties with (state or non-state) actors that share its own interests and values – an approach that can lead to more reliable partnerships that deliver on the EU’s interests in the longer term.

### Introduction

The Horn of Africa is becoming ever more geopolitically crowded, with an increasing number of external actors expanding their presence in the region.<sup>1</sup> Nowhere is this process

more visible than along the Horn’s shores, where over the past couple of decades several foreign countries have developed and operated a growing number of military bases and commercial ports.

1 For the purpose of this brief, the Horn of Africa is defined as comprising Ethiopia, Eritrea, Djibouti, Somalia (including Somaliland and Puntland), Sudan, and South Sudan. Vertin, Z. 2019. ‘Red Sea Rivalries: The Gulf, the Horn of Africa & the new geopolitics of the Red Sea’, Doha: Brookings Doha Center; Ursu, A.-E., Van den

Berg, W. 2018. *China and the EU in the Horn of Africa: competition and cooperation?*, CRU Policy Brief, The Hague: Clingendael; De Bruijne K., and Lanfranchi, G. 2022. *The Russians are coming! The Russians are coming?*, CRU Report, The Hague: Clingendael; Mosley, J. 2021. ‘Turkey and the Gulf States in the Horn of Africa: Fluctuating dynamics of engagement, investment and influence’, Nairobi: Rift Valley Institute.

As a result, Djibouti currently hosts military bases from the United States (US), France, Italy, Japan, and China, as well as Chinese-operated port facilities. The United Arab Emirates (UAE) only recently dismantled a military base in Eritrea, while an Emirati company still controls the two largest ports on the northern Somali coast. On the other hand, a Turkish company operates the port of Mogadishu in the south, where Turkey has also opened a military facility for the training of Somali forces. Adding to this already crowded scene, Russia has been long discussing the opening of a military base in Sudan, and Saudi Arabia has reportedly done the same in Djibouti.

The growing presence of many foreign countries has important implications for the Horn. All of these countries operate in the region according to their own strategies, deploying their preferred policy tools in order to advance their own interests. When doing so, they engage with local stakeholders within the Horn, which in turn seek to leverage external support to further their own domestic interests.<sup>2</sup> At the same time, foreign countries that are active in the Horn also interact with each other, and these interactions also have an impact on the region. This was clearly on display over the past few years, as competition among countries in the Middle East quickly spilled over into the Horn.<sup>3</sup>

In this complex web of interactions, this policy brief focuses on the engagement of the European Union (EU) in the Horn of Africa, and on how this engagement relates to that of other foreign countries that are active in the region. In May 2021, the EU declared the Horn to be a “geo-strategic priority”.<sup>4</sup> This brief unpacks this definition by exploring the various drivers,

interests, and tools underpinning the EU’s regional approach. It then provides a brief overview of the engagement of other relevant foreign countries that are active in the region, namely the UAE, Saudi Arabia, Qatar, Turkey, China, and Russia. Based on this overview, the brief offers recommendations for European policy makers on how to make the EU’s engagement more strategic in light of the growing presence of other foreign actors.

In particular, this brief suggests that the EU should: (i) formulate a more detailed strategy for the Horn, spelling out more concretely its interests and objectives, and the way to achieve these; (ii) focus on establishing partnerships with actors that share the EU’s interests and values in the longer term, rather than on keeping actors out of the orbit of its geopolitical rivals; (iii) focus on the EU’s added value in the region, namely its development cooperation efforts; (iv) deepen the understanding of the engagement of other foreign actors, including through exploratory diplomatic exchanges; and (v) explore cooperation with other foreign countries when useful (i.e. on infrastructure development and humanitarian aid), while competing with them when their activities run against the EU’s interests.

## **The EU in the Horn of Africa**

Europe’s presence in the Horn of Africa dates back to the late 19<sup>th</sup> century, when the United Kingdom (UK), Italy, and (to a lesser extent) France colonised large parts of the region.<sup>5</sup> In the decades following the end of World War II, countries across the region gradually gained their independence. This drastically reconfigured the relationship between the Horn and Europe, but it did not sever it. Currently, the Horn of Africa continues to be an important region for Europe’s foreign policy, as shown by the EU’s decision to classify the Horn as a “geo-strategic priority”.<sup>6</sup> Relying on a combination of EU policy documents, conversations with

---

2 Lanfranchi, G. 2021. *Geopolitics meets local politics in the Horn of Africa*, Clingendael Spectator, The Hague: Clingendael.

3 International Crisis Group. 2019. *Intra-Gulf Competition in Africa's Horn: Lessening the Impact*. Middle East Report N°206. Brussels: International Crisis Group Somalia is a particularly relevant case in point in this regard: International Crisis Group. 2018. *Somalia and the Gulf Crisis*, Africa Report N°260. Brussels: International Crisis Group.

4 Council of the European Union. 2021. ‘The Horn of Africa: a geo-strategic priority for the EU – Council conclusions (8135/21, 10 May 2021)’, Brussels: Council of the European Union.

---

5 Degu, W. A. 2002. *The state, the crisis of state institutions and refugee migration in the Horn of Africa: the cases of Ethiopia, Sudan and Somalia*. Amsterdam: University of Amsterdam.

6 Council of the EU, 2021, ‘The Horn of Africa: a geo-strategic priority for the EU’, op. cit.

(former) European policy makers, and existing research, this section unpacks the main drivers, interests, and tools underpinning the EU's engagement in the Horn.<sup>7</sup>

## Drivers and interests behind the EU's engagement

The EU's engagement in the Horn is underpinned by a combination of multiple drivers. Historical linkages constitute an important backbone, as shown by the efforts of EU member states with a colonial history in the Horn to muster EU support for the region. As late as 2018, for instance, Italy and the UK were particularly active in pushing the EU to maintain a high level of support for Somalia, despite concerns by other member states that the sum spent by the EU in the country was outsized in comparison to the bloc's interests, as well as to the results of its intervention.<sup>8</sup>

Besides these historical connections, the EU's approach is also driven by a number of other considerations. An estimated 20% of the bloc's trade, including crucial energy supplies, transits through the Red Sea and the Bab el-Mandeb Strait.<sup>9</sup> This means that maritime security along the Horn's shores is a primary concern for the European policy makers. The EU is keen to ensure freedom of navigation in the region, and to protect commercial ships from any potential security threats, such as piracy

or the spill-over of regional conflicts.<sup>10</sup> Security concerns also include the fight against terrorism, a recurrent topic in EU policy documents on the Horn.<sup>11</sup> This concern is particularly strong in Somalia, where the extremist group Al-Shabaab has a foothold, as well as in Sudan, which in the 1990s provided refuge to extremist leaders like Osama bin Laden.

The EU's presence in the Horn is also motivated by geopolitical considerations. Located at the crossroads between Europe, Africa, and Asia, the Horn has a clear geo-strategic value, as shown by the presence of several military bases in the area. The EU members France and Italy both have permanent military bases in Djibouti, which has also served as a key logistical hub for the EU's anti-piracy mission EUNAVFOR Atalanta.<sup>12</sup> Besides ensuring its own presence in the region, the EU also seeks to limit the potential footprint of its geopolitical rivals in the Horn – most notably Russia, and particularly after its invasion of Ukraine.<sup>13</sup>

Migration also features as a major driver of the EU's approach in the Horn, particularly since the mid-2010s. The region is a major migration hub in Africa, hosting an estimated 6 million international migrants.<sup>14</sup> In fact, however, only a small fraction of these people actually move towards Europe. Since 2016, Horn countries have almost never featured in the top 10 countries of origin of migrants

- 
- 7 The EU documents reviewed here include (but are not limited to) the following: EU Council conclusions 'The Horn of Africa: a geo-strategic priority for the EU' (8135/21, 10 May 2021), 'Horn of Africa/Red Sea' (10027/18, 25 June 2018), 'EU Horn of Africa Regional Action Plan 2015-2020' (13363/15, 26 October 2015), 'The Horn of Africa' (3124<sup>th</sup> FAC, 14 November 2011); European Parliament documents 'The EU's strategic relationship and partnership with the Horn of Africa' (P9\_TA(2022)0345, 5 October 2022), 'EU-African security cooperation in the Sahel region, West Africa and the Horn of Africa' (P9\_TA(2020)0213, 16 September 2020); European Parliament research documents 'The Horn of Africa' (October 2022), 'EU strategy in the Horn of Africa' (December 2016), 'The EU Strategic Framework for the Horn of Africa: A critical assessment of impact and opportunities' (20 August 2012).
- 8 Conversations with European diplomats working on Africa policy, Brussels, autumn 2018.
- 9 European External Action Service. 2023. 'The Horn of Africa: a geo-strategic priority for the EU', [https://www.eeas.europa.eu/eeas/horn-africa-geo-strategic-priority-eu\\_en](https://www.eeas.europa.eu/eeas/horn-africa-geo-strategic-priority-eu_en) (accessed on 2 October 2023).

- 10 In the late 2000s, attacks by Somali pirates threatened to disrupt shipping in the region, while in the late 2010s missiles from war-torn Yemen hit commercial ships. Peter, A. 2011. 'Giant motherships give Somali pirates new reach-EU', Reuters, 28 January, <https://www.reuters.com/article/us-somalia-pirates-motherships-idUSLNE70R02O20110128> (accessed 2 October 2023); Saul, J. 2018. 'Ship carrying wheat to Yemen hit by missile - EU navy force', Reuters, 23 May, <https://www.reuters.com/article/yemen-security-shipping-idINL5N1SU5TS> (accessed 2 October 2023).
- 11 Successive EU Council Conclusions on the Horn (2011, 2018, 2021) all reference the fight against terrorism as one of the EU's concerns in the region.
- 12 For instance, German and Spanish troops have been deployed to Djibouti as part of EUNAVFOR Atalanta.
- 13 Sudan Tribune. 2022. 'EU, Troika urge Sudan to condemn Russian attack on Ukraine', <https://sudantribune.com/article255788/> (accessed 2 October 2023).
- 14 International Organization for Migration, *A region on the move 2021: East and Horn of Africa*, Nairobi: International Organization for Migration.

reaching Europe,<sup>15</sup> and in recent years the number of people travelling from the Horn to Europe has hovered around 5,000 people per year, accounting for less than 3% of the total number of migrants moving into the continent.<sup>16</sup> Yet, growing political pressure within Europe has led the EU to devise policies to take action on the topic. In the Horn, this has led to the creation of the Khartoum Process, a dialogue forum between the EU, its members, and Horn countries aimed at better managing migration flows.<sup>17</sup> The rationale and effectiveness of these measures, however, has been severely contested (see Box 1 below).<sup>18</sup>

Economic considerations are also part of European policy makers' calculus, though arguably to a lesser extent as compared to other issues. Currently, the EU's bilateral trade with Horn countries is rather limited. In 2021, the bloc's trade with Ethiopia (by far the region's largest market) amounted to USD 2.58 billion – a mere 0.05% of the EU's overall trade.<sup>19</sup> The region's

rapidly growing population – expected to reach 360 million by 2050 – could be a potentially relevant market, but its capacity to absorb the supply of European companies remains limited, not least due to its low purchasing power. A number of European businesses have been actively engaged in the Horn over the past decades, particularly in Ethiopia.<sup>20</sup> Yet, their presence in the region remains limited, constrained by the persistent difficulties of doing business in the region.<sup>21</sup>

Finally, EU policy documents on the Horn also heavily stress the bloc's declared desire to improve the living conditions of the region's population. In the shorter term, this mostly entails addressing the pressing humanitarian needs faced by the region, for instance in terms of access to food and water. In the longer term, the EU's goals include supporting peace and security as a basic requirement for the promotion of sustainable and inclusive economic development. In particular, peace promotion has been a major component of the EU's engagement in the region over the past decades, taking up a considerable share of the bloc's diplomatic efforts.<sup>22</sup> Official EU documents also include among their goals issues such as the promotion of democracy, human rights, the rule of law, and gender equality.<sup>23</sup>

---

15 International Organization for Migration, 'Migration Flows to Europe – Arrivals', <https://dtm.iom.int/europe/arrivals> (accessed 2 October 2023).

16 International Organization for Migration. 'Europe — Mixed Migration Flows to Europe, Quarterly Overview (Oct - Dec 2022)', <https://dtm.iom.int/datasets/europe-mixed-migration-flows-europe-quarterly-overview-oct-dec-2022> (accessed 12 October 2023) (elaboration by the author). Since 2016, Horn countries have rarely featured in the top 10 countries of origin of migrants reaching Europe. International Organization for Migration, 'Migration Flows to Europe – Arrivals', <https://dtm.iom.int/europe/arrivals> (accessed 2 October 2023).

17 These efforts have included support for the stricter patrolling of borders, the hosting of migrants and refugees within the Horn itself, increased cooperation with countries of origin on return and reintegration, as well as the creation of new jobs and economic opportunities to disincentivize departures. See: Khartoum Process. (n.d.). 'The Khartoum Process', <https://www.khartoumprocess.net/> (accessed 2 October 2023).

18 Campbell J.R. (n.d.). 'Conflicting Perspectives on the 'migrant crisis' in the Horn of Africa, London: School of Oriental & African Studies.

19 Observatory of Economic Complexity, 'European Union', [https://oec.world/en/profile/international\\_organization/european\\_union](https://oec.world/en/profile/international_organization/european_union) (accessed 2 October 2023). Note that the EU's bilateral trade with Ethiopia is comparable to or lower than the trade with countries such as Uruguay (3.59 billion), Ecuador (6.75 billion), or Sri Lanka (5.02 billion), which are usually not considered to be particularly relevant economic partners for the bloc.

20 For instance, the Italian construction giant Salini Impregilo has been active in the building of the Grand Ethiopian Renaissance Dam (GERD), while several Dutch businesses have been involved in the horticulture sector. Oirere, S. 2016. 'Salini Impregilo Wins \$2.8-Billion Hydropower Contract in Ethiopia', Engineering News Record, June 17, <https://www.enr.com/articles/39683-salini-impregilo-wins-28b-hydropower-contract-in-ethiopia> (accessed 2 October 2023); Ministerie van Landbouw, Natuur, en Voedselkwaliteit. 2018. 'Development Kunzila improves food security Ethiopia', <https://www.agroberichtenbuitenland.nl/actueel/nieuws/2018/12/28/development-kunzila-improves-foodsecurity-ethiopia> (accessed 2 October 2023).

21 Somalia, Sudan and South Sudan have been affected by widespread conflicts and international financial sanctions over the past three decades. Eritrea has been isolated for decades by the international community. Ethiopia, long regarded as the region's beacon of stability, has been mired in a deadly conflict over the past two years. While Djibouti remains stable, economic opportunities in the country are limited to the maritime logistics sector.

22 See, for instance, the EU's involvement in peace processes in Sudan, South Sudan, and Somalia.

23 EU Council conclusions "The Horn of Africa: a geo-strategic priority for the EU" (8135/21, 10 May 2021).

**Box 1: The EU in the Horn: Drivers vs. interests**

Official EU policy documents on the Horn list a wide range of drivers and goals underpinning the bloc's engagement (see above). At times, however, a deeper scrutiny may call into question to what extent some of these drivers actually correspond to the EU's actual interests.

Migration, for instance, features as a key pillar of the EU's strategy in the region, as shown by the EUR 1.8 billion allocated to the Horn as part of the EU's Emergency Trust Fund for Africa.<sup>24</sup> Yet, as noted earlier, the number of migrants moving from the Horn towards Europe has actually been very limited, with other regions – most notably West Africa, the Middle East, and South Asia – accounting for a much larger share of incoming migrants.<sup>25</sup> In addition, the assumptions underpinning the EU's approach to reducing migration flows from the Horn can also be questioned. Over the past decade, creating jobs and economic opportunities in the countries of origin has been a key part of the EU's strategy to address the root causes of migration.<sup>26</sup> The assumption underpinning this policy is that these new economic opportunities will encourage people to remain in their own country, rather than seeking to move to Europe. This assumption, however, has been repeatedly called into question, with academic evidence suggesting that new economic opportunities can actually enable people to migrate by giving them the necessary income to do so – thus ending up increasing, rather than decreasing, migratory flows.<sup>27</sup>

Similarly, on the key issue of maritime security, the prevalent narrative in policy making circles is that, in order to protect the EU's key interest in the flow of seaborne trade through the Bab el-Mandeb Strait, it is necessary to have stability in the coastal states – both in the Horn and on the Arabian Peninsula. In reality, however, over the past decades the EU and its partners have managed to ensure the free flow of trade in the region despite persisting instability and conflict on both sides of the Red Sea (Somalia and Yemen). The fight against Somali pirates, for instance, has been won by deploying international warships to escort commercial vessels. As a result, threats to global shipping – and to the EU's core interests – have now subsided, despite persisting instability in Somalia. This may lead some to argue that, contrary to the prevailing narrative, stabilising Somalia is not a prerequisite for protecting the EU's interest in the free flow of trade along the Horn's shores – though keeping the problem at bay in the long run may require persistent international engagement.<sup>28</sup>

---

24 European Commission. 2023. 2022 Annual Report EU Emergency Trust Fund for Africa, Brussels: European Commission, p. 7.

25 Since 2016, Horn countries have rarely featured in the top 10 countries of origin of migrants reaching Europe. International Organization for Migration, 'Migration Flows to Europe – Arrivals', <https://dtm.iom.int/europe/arrivals> (accessed 2 October 2023).

26 Mutambo, A. 2022. 'EU's new strategy for Africa sees jobs, security, as to stemming illegal migration', *The East African*, 12 February, <https://www.theeastfrican.co.ke/tea/news/east-africa/eu-s-new-strategy-africa-jobs-security-stemming-illegal-migration-3714018> (access 2 October 2023). This strategy shows continuity with that of previous European Commission President Jean-Claude Juncker. See: Dahir, A. L. 2018. 'Europe's latest plan to stem illegal African migration is to create 10 million jobs in five years', *Quartz*, 12 September, <https://qz.com/africa/1387736/europe-plans-10-million-jobs-for-africans-to-stop-illegal-migration> (accessed 2 October 2023).

27 For instance, there is some evidence that emigration rates are higher in more developed regions within African countries, as well as among individuals with higher than average socio-economic status – though these findings need more rigorous causal analysis. For a quick overview of such debates, see: De Haas, M., Frankema, E. 2022. *Migration in Africa*, London: Routledge.

28 Georgetown University Center for Security Studies. 2022. 'Maritime piracy is on the decline... Can it stay that way?', <https://georgetownsecuritystudiesreview.org/2022/11/14/maritime-piracy-is-on-the-decline-can-it-stay-that-way/#:~:text=In%202009%20alone%2C%2017%20of,in%20check%20throughout%20the%20region> (accessed 2 October 2023).

**Box 1 (continued)**

Overall, these examples show the need for a thorough reflection among European policy makers about the actual interests underpinning the EU's engagement in the Horn, as well as the strategies adopted to achieve the bloc's goals. Such an analysis, together with reflections on value-based considerations (i.e. the desire to improve the living conditions of the Horn's population), should form the basis of the EU's policy in the region.

## A wide toolbox

The EU's engagement in the Horn of Africa takes place through a wide range of different tools. The bloc is diplomatically active in the Horn, engaging bilaterally with Horn countries in regular political dialogue sessions. It also cultivates close ties with regional organisations like the Intergovernmental Authority on Development (IGAD) and the African Union (AU), including by contributing to a large share of their budgets.<sup>29</sup> In addition to the work of EU Delegations, the EU Special Representative (EUSR) for the Horn of Africa is tasked with representing the bloc across the region.

Humanitarian assistance and development cooperation are two key components of the EU's toolbox in the Horn of Africa. Having committed an estimated EUR 8.5 billion in funding over the past 10 years, the EU is a major provider of humanitarian assistance to the region.<sup>30</sup> This assistance has focused on providing immediate relief to people in need (e.g. food, water, sanitation, healthcare), as well as on responding to health and climate disasters. The provision of humanitarian aid by the EU largely runs via multilateral institutions

such as the United Nations (UN), and is often implemented in cooperation with (international) non-governmental organisations (NGOs), rather than directly via Horn governments.<sup>31</sup>

The EU is also a leading provider of development assistance to the Horn, with an estimated EUR 10 billion having been committed to the region over the past decades in areas such as agricultural and rural development, social protection, healthcare, and education.<sup>32</sup> Over the coming years, funding for development projects is set to be centralised under the recently created NDICI-Global Europe. This tool includes financial instruments aimed at stimulating private investments by European businesses in support of development efforts,

- 
- 29 Institute for Security Studies. 2021. 'PSC Insights – AU financial independence: still a long way to go', <https://issafrica.org/pscreport/psc-insights-african-financial-independence-still-a-long-way-to-go> (accessed 2 October 2023).
- 30 European Commission. 'EU Aid Explorer – Recipients', [https://euaidexplorer.ec.europa.eu/explore/recipients\\_en](https://euaidexplorer.ec.europa.eu/explore/recipients_en) (accessed 2 October 2023) (elaboration by the author). This estimate considers the ten years between 2014 and 2023, though it should be taken into account that expenditures from 2022 and 2023 are not yet fully reported in the database.

31 Ethiopia used to be a country where the EU (much like other Western donors) used to provide humanitarian assistance via the government, though this has been changing recently, most notably in the wake of major scandals concerning the government's role in mismanaging food aid. See: Paravicini, G. 2023. 'Many culprits stole food aid in north Ethiopia, investigation finds', Reuters, 18 June, <https://www.reuters.com/world/africa/many-culprits-stole-food-aid-north-ethiopia-investigation-finds-2023-06-15/> (accessed 2 October 2023).

32 European Commission. 'EU Aid Explorer – Recipients', [https://euaidexplorer.ec.europa.eu/explore/recipients\\_en](https://euaidexplorer.ec.europa.eu/explore/recipients_en) (accessed 2 October 2023) (elaboration by the author). This estimate considers the ten years between 2014 and 2023, though it should be taken into account that expenditures from 2022 and 2023 are not yet fully reported in the database. Development priorities for the coming years include issues such as healthcare, education, entrepreneurship, regional integration, natural resources management, green technologies, and access to energy (EU Council Conclusions May 2021).

for instance through credit guarantees.<sup>33</sup> This shift reflects the willingness of many EU donors to reduce public development spending and to increase the role of their own private sector in the development field.<sup>34</sup> It remains to be seen, however, to what extent European businesses may be willing and/or able to effectively contribute to development through their investment, particularly in an unstable region like the Horn.<sup>35</sup>

The EU's role in supporting development should also be seen in combination with its trade policy, which can have a significant developmental impact on the region. All Horn countries fall under the 'Everything but Arms' (EBA) scheme, and thus enjoy exemptions from EU tariffs and quotas.<sup>36</sup> Yet, trade between the two regions remains imbalanced, with the EU's exports being significantly larger and consisting of

higher value-added products.<sup>37</sup> To a certain extent, this imbalance is due to structural differences between the two regions, with the difficult economic conditions in the Horn (e.g. persistent instability, weak governance, poor infrastructure, a lack of education) making it hard for businesses to move up the value chain and to be competitive in international markets. However, at times, EU policies create additional obstacles. For instance, EU non-tariff barriers create impediments for Ethiopian businesses seeking to export their products to Europe.<sup>38</sup> Moreover, the EU's practice of striking separate trade deals with individual African countries can stifle the development of intracontinental trade, with a negative developmental impact for African countries.<sup>39</sup> These observations call for a reflection by EU policy makers on how to ensure that the bloc's trade policies do not work against the potential gains achieved by its development cooperation efforts.

Besides humanitarian assistance and development cooperation, the EU's presence in the region also features a security dimension. This security component is particularly strong in

---

33 European Commission. 2020. 'Team Europe: EU seals agreements to generate €10 billion in investment in Africa and the EU Neighbourhood and stimulate global recovery', [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_2076](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_2076) (accessed 2 October 2023).

34 See, for instance, the Netherlands: Ministry of Foreign Affairs. 2022. 'Do what we do best – A strategy for Foreign Trade and Development cooperation', Policy Document 2022.

35 The effectiveness of the private sector's action may depend on a number of factors, including: whether private capital is interested in moving into the region, even with public incentives or guarantees, in light of the particularly high-risk environment; whether private funds can generate added value, rather than merely replacing public money; whether private capital can deliver benefits for Horn countries on their specific development priorities, rather than focusing on areas where it can maximize profits. It should also be kept in mind that European businesses do not always enjoy a positive reputation in the Horn – as shown for instance by the burning of Dutch, Italian, and Belgian farms during protests in Ethiopia in 2016. See: (Maasho, A. 2016. 'Foreign-owned flower farms attacked in Ethiopia unrest – growers' Reuters, 2 September, <https://www.reuters.com/article/ethiopia-violence-idINKCN11824U> (accessed 2 October 2023).

36 European Commission. 'Everything but Arms (EBA)', [https://trade.ec.europa.eu/access-to-markets/en/content/everything-arms-eba#:~:text=Tariffs,The%20EBA%20scheme%20removes%20tariffs%20and%20quotas%20for%20all%20imports,least%20developed%20countries%20\(LDCs\)](https://trade.ec.europa.eu/access-to-markets/en/content/everything-arms-eba#:~:text=Tariffs,The%20EBA%20scheme%20removes%20tariffs%20and%20quotas%20for%20all%20imports,least%20developed%20countries%20(LDCs)) (accessed 10 October 2023).

---

37 In the case of Ethiopia (by far the EU's largest trade partner in the Horn), in 2021 the EU's exports to the country amounted to USD 1.79 billion, while its imports amounted to USD 793 million. In terms of added value, almost 80% of the EU's imports from Ethiopia consisted of agricultural products, while over 70% of its exports consisted of machinery, transportation equipment and chemical products. Trade relations with the EU's second largest trading partner in the Horn, Sudan, closely mirror this trend as well: in 2021, 40% of the EU's exports to Sudan consisted of chemical products and machinery, while imports almost exclusively consisted of primary goods (oil, gum Arabic, precious stones and metals, copper and lead). Office of Economic Complexity. 'European Union', [https://oec.world/en/profile/international\\_organization/european-union](https://oec.world/en/profile/international_organization/european-union) (accessed 2 October 2023).

38 International Trade Center. 2018. Ethiopia: Company Perspectives. An ITC Series on Non-Tariff Measures, Geneva: International Trade Center.

39 Luke, D., Desta, M., Mevel, S. 2021. 'The European Union is undermining prospects for a free trade agreement with Africa', <https://blogs.lse.ac.uk/africaatlse/2021/12/14/european-union-is-undermining-prospects-for-free-trade-agreement-with-africa-epa-afcfta/> (accessed 2 October 2023).

Somalia, where the bloc is engaged in several military and civilian missions.<sup>40</sup> Moreover, the EU is the largest financial contributor to the AU's Transition Mission in Somalia (ATMIS), having committed EUR 2.4 billion over the past 17 years.<sup>41</sup> In the coming years, the EU's security-related support is expected to be channelled largely through the European Peace Facility (EPF), established in 2021, which for the first time may also fund the supply of lethal military equipment.<sup>42</sup> In addition to the EU's engagement as an institution, the EU member states France and Italy both have permanent bases in Djibouti, where German and Spanish troops have also been deployed for a long time as part of the EU's anti-piracy efforts.

In addition to these broader categories of cooperation, the EU can deploy a number of specific tools as part of its strategy. Targeted sanctions – ranging from country-level arms embargoes to individual-level assets freezes and travel bans – are regularly used by EU policy makers. Their purposes vary, including

for instance cutting funding to terrorist organisations in Somalia, punishing gross human rights violations in Eritrea, or preventing the spread of weapons in South Sudan.<sup>43</sup> The EU can also leverage its international clout as a member of the G20, which is currently playing a major role in discussing debt restructuring for various countries, including Ethiopia. EU member states also have a significant influence in multilateral institutions such as the UN, the World Bank, and the International Monetary Fund (IMF), although the lack of representation by EU institutions in those organisation makes it harder to coordinate action at the European level. Finally, the EU can rely on its soft power. Europe is an attractive destination for many people in the Horn, and European countries offer a number of scholarships and exchange opportunities for students from the region.<sup>44</sup> Moreover, the Horn diaspora community in the EU amounts to approximately 700,000 diaspora members, who often act as a bridge between the two regions, fostering cultural exchanges as well as business links.<sup>45</sup>

---

40 These include: EUNAVFOR Atalanta (anti-piracy), EUTM Somalia (training mission), and EUCAP Somalia (capacity building). European Union External Action Service. 2023. 'Missions and Operations', [https://www.eeas.europa.eu/eeas/missions-and-operations\\_en#9620](https://www.eeas.europa.eu/eeas/missions-and-operations_en#9620) (accessed 2 October 2023).

41 Council of the European Union. 2023. 'EU support to Somalia: Council approves further support under the European Peace Facility to the Somali National Army and to the African Union Transition Mission in Somalia (ATMIS)', <https://www.consilium.europa.eu/en/press/press-releases/2023/03/02/eu-support-to-somalia-council-approves-further-support-under-the-european-peace-facility-to-the-somali-national-army-and-to-the-african-union-transition-mission-in-somalia-atmis/> (accessed 2 October 2023).

42 Maletta, G., Heau, L., 2022. *Funding Arms Transfers through the European Peace Facility: Preventing Risks of Diversion and Misuse*, Stockholm: Stockholm International Peace Research Institute.

---

43 For an overview of the EU's sanctions, see: European Commission. 'EU Sanctions Map', <https://www.sanctionsmap.eu/#/main> (accessed 2 October 2023).

44 European Commission. 2019. 'Erasmus+: EU boosts participation of African students and staff in 2019', [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_19\\_5547](https://ec.europa.eu/commission/presscorner/detail/en/IP_19_5547) (accessed 2 October 2023).

45 Most diaspora members are originally from Somalia (340,000), Eritrea (160,000), and Ethiopia (133,000) (<https://diasporafordevelopment.eu/interactive-map/>). The Somali diaspora is particularly active in terms of setting up organizations and business that create links between Europe and Somalia. See: African Foundation for Development. 2020. 'Diaspora Engagement Mapping Somalia', [https://diasporafordevelopment.eu/wp-content/uploads/2020/07/CF\\_Somalia-v.6.pdf](https://diasporafordevelopment.eu/wp-content/uploads/2020/07/CF_Somalia-v.6.pdf) (accessed 2 October 2023).

**Box 2: The EU's engagement with individual Horn countries**

This section has explored the drivers, interests, and tools underpinning the EU's overall regional approach to the Horn. Unfortunately, this broad overview fails to capture the nuances of the specific relations between the EU (as well as its member states) and individual Horn countries, which can vary significantly. It also fails to acknowledge the ways in which power brokers within the Horn actively try to shape the EU's engagement in the region, and to leverage it to advance their own political interests. This more nuanced type of analysis lies outside the scope of this brief, and has been explored elsewhere.<sup>46</sup> To better capture at least some of these dynamics, this box provides a brief overview of the relations between the EU and individual Horn countries.

Ethiopia has traditionally been the EU's key partner in the region, with a good degree of cooperation across several domains.<sup>47</sup> Successive Ethiopian governments have benefited from large sums of EU aid, while also managing to remain relatively insulated from political pressure by the EU thanks to Addis' role as the bloc's key interlocutor in the Horn.<sup>48</sup> However, the war in Tigray has led to a serious setback in EU-Ethiopian ties, although in the aftermath of the Pretoria peace agreement there have been signs of rapprochement, as the EU seeks to regain its key counterpart in the region, while Ethiopia hopes to unlock international funding to support its battered economy.<sup>49</sup>

In Sudan, the three decades of rule by Omar al-Bashir were characterized by a difficult relationship with the EU, though cooperation did take place on issues such as migration.<sup>50</sup> After al-Bashir's fall, the EU sought to support the country's transition towards civilian rule and democracy, though its readiness to engage with Sudan's generals has been credited by some as obstructing such a transition.<sup>51</sup> The conflict taking place since April 2023 has drastically changed the dynamics in the country, with efforts now focused on attaining a ceasefire and providing support for the conflict-affected population.

In Somalia, the EU's engagement has largely consisted of the provision of various forms of support for the country. The EU has backed successive peace processes, provided large amounts of humanitarian and development aid, while also being a leading financial contributor to AU-led security missions in the country.<sup>52</sup> Successive transitional governments have been able to leverage this external support (from the EU as well as from other international actors) to remain in power despite their limited capacity to exercise control over the country.<sup>53</sup>

---

46 Lanfranchi, 2021, *Geopolitics meets local politics in the Horn of Africa*, op. cit.

47 Ethiopia has spearheaded EU-supported counter-terrorism efforts in Somalia. It is also the EU's largest trade and investment partner in the region, it hosts the headquarters of the African Union, and it enjoys a strong clout at the continental level. It has also been an important partner for the EU in UN bodies, as well as in various multilateral forums in fields such as telecoms, aviation, and food security.

48 For instance, cooperation between the EU and the Ethiopian government continued even after the government's violent crackdown on protesters in the wake of the contested 2005 elections.

49 Hoffmann, A., Lanfranchi, G. 2023. *Europe's re-engagement with Ethiopia*, Clingendael Alert, The Hague: Clingendael

50 Saeneen, G.M., Tubiana, J., Warin, C. 2018. *Multilateral Damage – The impact of EU migration policies on central Saharan routes*, CRU Report, The Hague: Clingendael.

51 Hoffmann, A. 2022. *The West's struggle in Sudan – Standing with the people while being stuck with the coup regime*, CRU Policy Brief, The Hague: Clingendael.

52 Hauck, V. 2023. 'New hopes for Somalia: Reflections on the EU's continued support in a fragile context', Maastricht: European Centre for Development Policy Management.

53 Reflecting the federal government's dependence on the international community, in 2021 official development assistance accounted for 43% of the country's GDP, while domestic revenue accounted for only 4%. See: Federal Government of Somalia. 2021. 'Aid Flows in Somalia', p. 4.

**Box 2 (continued)**

Similar dynamics have taken place in South Sudan. The EU – together with several other international actors – has backed successive peace processes and provided humanitarian and development aid.<sup>54</sup> This external support has ensured the delivery of a modicum of essential services (e.g. food, water, health) in the country. On the other hand, South Sudanese ruling elites have focused on siphoning off much of the country's oil wealth, leaving it to the international community to provide basic services for the population.<sup>55</sup>

The EU's partnership with Djibouti has more narrowly revolved around the country's role as a host for European military bases and forces, with little attention being paid to the country's repressive domestic politics. This has allowed the ruling elites to use rents coming from abroad (including Europe) to consolidate power domestically.<sup>56</sup>

Finally, the EU's engagement in Eritrea has been the most limited, due to the difficult relations with the country's longtime ruler Isaias Afwerki. For a long time the Eritrean government was subjected to UN sanctions,<sup>57</sup> and has recently attracted criticism by the EU (among others) for its role in the conflict in Tigray.<sup>58</sup>

- 
- 54 European External Action Service. 2021. 'The European Union and South Sudan' [https://www.eeas.europa.eu/south-sudan/european-union-and-south-sudan\\_en?s=121](https://www.eeas.europa.eu/south-sudan/european-union-and-south-sudan_en?s=121) (accessed 2 October 2023).
- 55 For instance, South Sudan's 2019-2020 budget set aside more money for healthcare allowances for MPs than for the entire health ministry. See: International Crisis Group. 2021. *Oil or Nothing: Dealing with South Sudan's Bleeding Finances*, Africa Report N°305, Brussels: International Crisis Group
- 56 Borowicz, J. 2017. 'Strategic Location and Neopatrimonialism in Djibouti', Thesis. Amsterdam: University of Amsterdam.
- 57 United Nations. 2018. 'Eritrea sanctions lifted amid growing rapprochement with Ethiopia: Security Council', <https://www.un.org/africarenewal/news/eritrea-sanctions-lifted-amid-growing-rapprochement-ethiopia-security-council> (accessed 2 October 2023).
- 58 Chadwick, V. 2021. 'EU pulls Eritrea funding, citing Tigray conflict, 'lack of interest'', devex, 23 April, <https://www.devex.com/news/eu-pulls-eritrea-funding-citing-tigray-conflict-lack-of-interest-99743> (accessed 2 October 2023).

## A crowded field

The joint deployment of the various tools described above makes the EU a relevant actor in the Horn of Africa. Yet, the EU is far from being the only external actor that is present in the region. Over the past decades, many countries have increased their footprint in the Horn – at times for the first time in their history, at times as a comeback after a period of absence. Drawing on a combination of past research efforts and more recent updates,<sup>59</sup> this section provides a brief overview of the engagement of some of these external actors, namely: the Arab Gulf countries, Turkey, China, and Russia.

### Arab Gulf countries

Building on longstanding historical connections between the Arabian Peninsula and the Horn of Africa, three Arab Gulf countries in particular – the United Arab Emirates (UAE), Saudi Arabia, and Qatar – have markedly stepped up their engagement in the Horn over the past decades.<sup>60</sup> All three countries have been eager to project their power into a region that they tend to see as their strategic backyard. At times, particularly in Sudan, this quest for influence has also been motivated by a desire to prevent the spread of pro-democracy movements in the Arab world, which may threaten the domestic legitimacy

of authoritarian governments in the Gulf.<sup>61</sup> The Gulf countries also have an interest in ensuring maritime security in the region, given that shipping disruptions could disrupt both energy markets and important seaborne trading routes.<sup>62</sup> Moreover, all three countries are eager to protect their existing business interests in Sudan – particularly large-scale investments, especially in agriculture, often managed by businesses with strong connections to the Gulf's ruling regimes.<sup>63</sup> As for trade, the Horn's overall relevance for the Gulf countries remains limited, except for some specific sectors such as the import of livestock.<sup>64</sup>

While these broader interests tend to be shared by all three Gulf countries, each of them also has its own specific interests. Saudi Arabia, for instance, is more directly concerned than other Gulf states about (in)stability in the region, due to its geographical proximity and to the large number of Horn migrants moving to Saudi Arabia.<sup>65</sup> From a military standpoint, the Horn is

---

<sup>59</sup> Past research by Clingendael on this topic includes the following: Ursu et al., 2018, *China and the EU in the Horn of Africa*, op. cit.; Meester, J., Van den Berg, W., Verhoeven, H. 2018. *Riyal Politik. The political economy of Gulf investments in the Horn of Africa*, CRU Report, The Hague: Clingendael; Meester, J., Van den Berg, W. 2019. *Turkey in the Horn of Africa. Between the Ankara Consensus and the Gulf Crisis*, CRU Policy Brief, The Hague: Clingendael; Lanfranchi, G., Meester, J. 2021. 'A careful foot can step anywhere'. *The UAE and China in the Horn of Africa: Implications for EU engagement*, Policy Brief, The Hague: Clingendael; De Bruijne and Lanfranchi, 2022, *The Russians are coming!*, op. cit.

<sup>60</sup> De Waal. 2019. *Pax Africana or Middle East Security Alliance in the Horn of Africa and the Red Sea?*, Occasional Paper No. 17, Summerville & London: World Peace Foundation & London School of Economics.

<sup>61</sup> For instance, after the fall of Omar al-Bashir in Sudan, the UAE and Saudi Arabia were quick to support Sudan's military leaders in their standoff against pro-democracy forces. See: Gallopin, J.B. (n.d.). 'The Great Game of the UAE and Saudi Arabia in Sudan', Washington D.C.: Project on Middle East Political Science.

<sup>62</sup> Elmi, A., Mohammed, S. 2016. 'The role of the GCC Countries in Edging Piracy in The Horn of Africa', Arab Center for Research and Policy Studies

<sup>63</sup> Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit.; Meester et al., 2018, *Riyal Politik*, op. cit. See, for instance, the deals made by the Emirati entities Dubai Ports World and Abu Dhabi Ports, and the Ethiopian business ventures of Saudi-Ethiopian entrepreneur Mohammed Hussein al-Amoudi. See: Mansour, S. 2022. 'DP World: From the Gulf to the Horn of Africa', Port Infrastructures, Birmingham: International Politics, and Everyday Life in the Horn of Africa; Africanews. 2021. 'Sudan signs \$6 billion UAE deal for new Red Sea port', Africanews, 14 December, <https://www.africanews.com/2022/12/14/sudan-signs-6-billion-uae-deal-for-new-red-sea-port/> (accessed 10 October 2023); Meester et al., 2019, *Riyal Politik*, op. cit., 52-53.

<sup>64</sup> Meester et al., 2018, *Riyal Politik*, op. cit, p. 31-33.

<sup>65</sup> IOM. 2022. 2022 'Migration Overview: Horn of Africa and Arabian Peninsula', <https://dtm.iom.int/reports/2022-migration-overview-horn-africa-and-arabian-peninsula> (accessed 10 October 2023).

particularly relevant for both the UAE and Saudi Arabia due to their involvement in the war in Yemen, in which Qatar is not engaged. Moreover, Riyadh and Abu Dhabi have traditionally sought to limit the influence of Iran and the Muslim Brotherhood – two actors with which Qatar, on the other hand, has enjoyed warmer ties. Over the past few years, this divergence of interests has led to an intense – though recently softening – competition among Arab Gulf countries, which has spilled over into the Horn too.<sup>66</sup>

To project their influence in the region, Arab Gulf countries largely rely on their deep pockets, jointly deploying a mix of aid, investments, as well as direct cash transfers to support their allies in the Horn.<sup>67</sup> The UAE and Saudi Arabia have been particularly active in this regard, pouring respectively an estimated USD 11 billion and USD 3.5 billion into Sudan, Ethiopia, and Djibouti between 2003 and 2020.<sup>68</sup> While Abu Dhabi has privileged investments and direct cash support, a larger share of Riyadh's transfers has consisted of aid flows.<sup>69</sup> Investments by both countries have largely focused on agriculture, logistics (especially for the UAE, which has been very active in developing ports in the Horn), as well as real estate.<sup>70</sup>

Besides economic tools, the Gulf countries' engagement in the Horn also takes place in domains such as security and diplomacy. The UAE stands out as the most active security player in the Horn, having operated a military base in Eritrea for many years and having trained

security forces in different regions of Somalia.<sup>71</sup> On the other hand, Qatar has been particularly active on the diplomatic front, providing peacekeepers at the Djibouti-Eritrea border, as well as facilitating mediation efforts in Sudan's Darfur region.<sup>72</sup> In more recent years, the UAE and Saudi Arabia have also stepped up their diplomatic efforts, with Saudi Arabia brokering the signature of the historic peace deal between Ethiopia and Eritrea in 2018, and the UAE offering its mediation in various conflicts in the region (e.g. the Ethiopia-Sudan border dispute, as well as over the management of the Nile's waters).<sup>73</sup> Most recently, Saudi Arabia has been leveraging its ties with both warring parties in Sudan to place itself as a mediator in the current conflict.

Finally, all three Gulf countries have leveraged soft power tools in order to advance their agendas in the Horn. They have done so, for instance, by providing humanitarian support, often through Islamic charities with links to the

---

71 For several years, the UAE trained forces from the Somali National Army; Reuters. 2018. 'UAE ends programme to train Somalia's military', Reuters, April 15, <https://www.reuters.com/article/us-emirates-somalia-military-idUSKBN1HM0Y5> (accessed 10 October 2023), as well as the Puntland Maritime Forces; Elmi and Mohammed, 2016. 'The Role of the GCC Countries in Edging Piracy in The Horn of Africa', op. cit., p. 10. Another Emirati military base had been planned in Berbera (Somaliland), although its construction did not eventually materialize; Garowe Online. 2020. 'UAE cancels construction of military base in Somaliland', Garowe Online, 4 March, <https://www.garoweonline.com/en/news/somaliland/uae-cancels-construction-of-military-base-in-somaliland> (accessed 10 October 2023). The security engagement of Saudi Arabia and Qatar, on the other hand, has been more limited. Doha's footprint was limited to a small peacekeeping force at the Djibouti-Eritrea border (withdrawn in mid-2017), while Riyad's reported plans to open a military base in Djibouti have not materialized.

72 Reuters. 2017. 'Qatar withdraws troops from Djibouti-Eritrea border mission', Reuters, 14 June, <https://www.reuters.com/article/uk-gulf-qatar-djibouti-idAFKBN1950W7> (accessed 10 October 2023); Ravelo, J.L. 2013. 'Qatar goes big on Darfur', devex, 8 April, <https://www.devex.com/news/qatar-goes-big-on-darfur-80656> (accessed 10 October 2023).

73 Stigant, S., Knopf, P. 2018. 'Ethiopia-Eritrea Peace Deal Brings Hope to Horn of Africa', Washington D.C.: United States Institute of Peace; Economist Intelligence Unit. 2021. 'UAE turns its attention to mediating international disputes', <http://country.eiu.com/article.aspx?articleid=330915616> (accessed 10 October 2023).

royal families in the Gulf.<sup>74</sup> While most of this assistance is channelled independently by the different governments, over the past decade the Gulf countries (particularly Qatar) have shown some willingness to increase their coordination with other donors, channelling a growing amount of funds via multilateral organizations like the UN.<sup>75</sup> Other soft power activities have included: the funding of mosques and Islamic schools (see the case of Saudi-funded Islamic schools in Somalia);<sup>76</sup> support for media outlets covering events in the Arab world and beyond (with Qatar's Al-Jazeera being the most well-known example, though not the only one);<sup>77</sup> as well as the cultivation of links with Horn diasporas living in the Gulf (although the presence of Horn migrants in the region has at times been a source of tension, for instance between Saudi Arabia and Ethiopia).<sup>78</sup>

## Turkey

Alongside the Arab Gulf countries, Turkey is another Middle Eastern country that has significantly strengthened its footprint in the Horn of Africa. This growing presence has been part of a broader push into Africa at large, which has been motivated by a desire to bolster the country's image as a relevant geopolitical actor, while also creating economic opportunities for Turkish businesses (including some with connections to the ruling elites) in emerging markets.<sup>79</sup> The Horn's relevance for Turkey also stems from maritime security concerns, given that a blockage of shipping through the Bab el-Mandeb Strait would threaten an estimated 24% of Turkey's seaborne trade.<sup>80</sup> Moreover, Turkey's high-profile engagement in Somalia since 2011 has further increased the relevance of the Horn, as Somalia has become a pivot country for Ankara's broader Africa strategy.<sup>81</sup>

- 
- 74 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 54–57; Humanitarian Policy Group. 2005. *Diversity in donorship: the changing landscape of official humanitarian aid*, HPG Background Paper, London: Overseas Development Institute; Kringen, J. 2012. 'GCC Economic Assistance to Africa: A Major Engagement Tool', Alexandria, VA: Institute for Defense Analysis. See, for instance, the activity in Sudan by Saudi Arabia's King Salman Humanitarian Aid and Relief Center (KSRelief), the UAE's Emirates Red Crescent (ERC), as well as Qatar's Qatar Charity (QC) and Qatar Red Crescent (QRC).
- 75 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 54–56. For instance, by 2017 Qatar had reportedly channelled an estimated 40% of its disbursements via multilateral organizations. The UAE has also increased its cooperation with other countries, most notably by trying to place itself as a key hub (including logically) in the global humanitarian architecture – though as compared to Qatar it has been less eager to channel its contributions via multilateral organizations.
- 76 Plaut, M. 2017. 'Faith and money from the Middle East fueling tensions in the Horn of Africa', The Conversation, 9 February, <https://theconversation.com/faith-and-money-from-the-middle-east-fuelling-tensions-in-the-horn-of-africa-72636> (accessed October 10); Osman, A. 2013. Somalia Takes Teaching to the Extreme, Inter Press Service, 4 October, <http://www.ipsnews.net/2013/10/somalia-takes-teaching-to-the-extreme/> (accessed 10 October).
- 77 Laub, Z. 2017. How Al Jazeera Amplifies Qatar's Clout, Background Report, New York City: Council of Foreign Relations. Other examples include, for instance, Al-Ekbariya (Saudi Arabia)
- 78 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 58–63. At times, however, the mistreatment of Horn migrants in the Gulf has given rise to tensions. See: Mills, A., Negeri, T., Pavicic, M. 2023. 'Saudi border guards killed hundreds of Ethiopian migrants, HRW says', Reuters, 22 August <https://www.reuters.com/world/middle-east/saudi-border-guards-killed-hundreds-ethiopian-migrants-hrw-says-2023-08-21/> (accessed October 10).
- 79 Aksoy, H.A., Cevik, S., Yasar, N.T. 2022. 'Visualizing Turkey's Activism in Africa', Berlin: Center for Applied Turkish Studies.
- 80 Donelli, F. 2021. *Turkey in Africa*, Bloomsbury Publishing. For instance, the Turkish defence company Baykar, which has sold war drones to Ethiopia during the Tigray war, features a son-in-law of the Turkish President as one of its senior executives. Marks, S. 2022. 'Evidence from civilian bombing in Ethiopia points to Turkish drone', Politico, 25 January, <https://www.politico.eu/article/evidence-civilian-bombing-ethiopia-turkish-drone/> (accessed 10 October).
- 81 It has been estimated that a closure of the Bab el-Mandeb Strait would reduce by 68.5% the trade flows via Turkey's port of Mersin on the Mediterranean coast. See: Pratson, L.F. 2023. 'Assessing impacts to maritime shipping from marine chokepoint closures', *Communications in Transportation Research*, Volume 3. The estimate of 24% is made by analyzing the reduction of trade via Mersin in relation to the overall trade handled by the combination of Mersin Port in the Mediterranean and Istanbul Port in the Black Sea.
- 82 Donelli, F. 2020. 'Somalia and Beyond: Turkey in the Horn of Africa', Milan: Italian Institute For International Political Studies. Turkey's engagement started with the provision of humanitarian aid in 2011, in the midst of a devastating famine. This high-profile initiative, accompanied by a presidential visit, created a positive image of Turkey in the country, paving the way for a deepening of bilateral ties in other domains. Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit.

Turkey's footprint in the Horn has largely been underpinned by a combination of aid provision and business activity. On the aid front, Turkey has been able to skilfully leverage its growing (though still limited) aid budget to build a positive image for itself in the region.<sup>82</sup> The most illustrative case is that of Somalia: although Ankara's aid contribution remains lower than that provided by several other donors,<sup>83</sup> this amount has rapidly grown over the past decade, and it has consolidated the image of Turkey as a reliable partner, paving the way for further cooperation in other areas.<sup>84</sup> In parallel, the Horn has also witnessed the growing presence of Turkish businesses, which have been active in a wide range of sectors, including logistics,

infrastructure, and banking.<sup>85</sup> The activities of both humanitarian and business actors are usually coordinated by the Turkish Cooperation and Coordination Agency (TIKA), an operative branch of Ankara's government, which acts as a pivot for both public and private initiatives.<sup>86</sup>

In addition to the provision of aid and the presence of businesses, Turkey's engagement has also relied on a combination of both hard and soft power tools. On the hard power side, Turkey has signed defence cooperation agreements with several countries in the region,<sup>87</sup> it has deployed its navy to halt piracy in the region,<sup>88</sup> it has opened a military training base in Somalia,<sup>89</sup> and it has sold weapons (including military drones) to both Somalia and Ethiopia.<sup>90</sup> On the other hand, Ankara has invested in people-to-people ties by supporting the construction of schools and funding scholarships for African

---

82 Turkey's aid to Africa is still a small fraction of that provided by donors such as the US, Germany, France, Japan, or the UAE. Aksoy, H.A., Cevik, S., Yasar, N.T. 2022. 'Visualizing Turkey's Activism in Africa', Berlin: Center for Applied Turkish Studies.

83 According to data by the federal government, Turkey's official development assistance to Somalia has hovered between USD 20 and 30 million per year (though with a major exception of USD 100 million in 2014), while the contributions of partners like the EU and the UK have often exceeded USD 100 million per year. United Nations Somalia. 2021. 'Aid Flows in Somalia 2021', <https://somalia.un.org/en/160002-aid-flows-somalia-2021> (accessed 10 October 2023). Turkey has regularly ranked among the 10 largest contributors of development aid. Yet, at least since 2015, these contributions have lagged behind those provided by donors such as the European Union and the UK (USD 20-40 million per year vs. hundreds of millions, respectively). See: United Nations Somalia. 2021. 'Aid Flows in Somalia 2021', <https://somalia.un.org/en/160002-aid-flows-somalia-2021> (accessed 10 October 2023).

84 Somalia is the African country that has witnessed the largest influx of Turkish aid, with the Turkish government claiming to have poured more than USD 1 billion into the country since 2011. See: Presidency of the Republic of Turkey. 2022. 'Our aid to Somalia over the last decade totals more than a billion dollars', <https://www.tccb.gov.tr/en/news/542/138671/-our-aid-to-somalia-over-the-last-decade-totals-more-than-a-billion-dollars-> (accessed 10 October 2023). Between 2007-08 and 2013-14, Turkey's aid to Somalia skyrocketed from USD 11 million to USD 190 million. This aid has created a significant amount of goodwill towards Turkey and its political leadership in Somalia, including among the population at large. See: Pitel, L. 2016. 'Somalia reaps rewards of Ankara's investment', Financial Times, 25 May, <https://www.ft.com/content/bae31b04-fa6f-11e5-8f41-df5bda8beb40> (accessed 10 October 2023).

85 Examples of Turkish companies that are active in the Horn include the following: Albayrak and Favori have been expanding and/or operating the largest seaport and airports of Mogadishu, the largest in Somalia; Yapı Merkezi has built the El Mek Nimr and Al-Halfaya bridges in Sudan's capital Khartoum, as well as the Awash-Kombolcha-Hara Gebaya railway in Ethiopia; and the state-owned bank Ziraat Katılım has opened branches in both Sudan and Somalia. Much of this engagement has been carried out by large multi-sector conglomerates, though small and medium-sized enterprises (SMEs) are also playing an increasingly prominent role. Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 53.

86 Donelli, F. 2018. 'The Ankara consensus: the significance of Turkey's engagement in sub-Saharan Africa', Global Change, Peace & Security, 30:1, 57-76, p. 72-73.

87 These include Sudan, Ethiopia, Djibouti, and Somalia. Aksoy, H.A., Cevik, S., Yasar, N.T. 2022. 'Visualizing Turkey's Activism in Africa', Berlin: Center for Applied Turkish Studies

88 Cimen, I., Balta, A. 2023. 'Türkiye extends mandate of naval forces' mission in Gulf of Aden', AA, 11 February, <https://www.aa.com.tr/en/turkiye/turkiye-extends-mandate-of-naval-forces-mission-in-gulf-of-aden/2813938> (accessed 10 October 2023)

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

90 Walsh, D. 2021. 'Foreign Drones Tip the Balance in Ethiopia's Civil War', New York Times, 20 December, <https://www.nytimes.com/2021/12/20/world/africa/drones-ethiopia-war-turkey-emirates.html> (accessed 10 October 2023)

students,<sup>91</sup> as well as by expanding airline connectivity between Turkey and the region.<sup>92</sup> Turkey has also become an increasingly attractive place of residence for diasporas from the Horn, including for political and business elites (especially from Sudan and Somalia).<sup>93</sup>

## China

Among the global powers that are active in the Horn, China has developed a particularly large footprint. China's engagement is driven to a significant extent by economic concerns – particularly in relation to maritime security, as the region acts as a transit hub for China's trade with Europe (EUR 850 billion per year), as well as for critical oil and gas imports.<sup>94</sup> The Horn also plays a role in China's global connectivity strategy, with Djibouti acting as a node in Beijing's Belt and Road Initiative (BRI).<sup>95</sup>

Direct economic interests are more limited: no country in the region provides China with critical resources,<sup>96</sup> and the Horn accounts for a mere 0.2% of China's overall trade.<sup>97</sup> However, several Chinese companies have been engaged in the region, most notably in sectors such as construction,<sup>98</sup> manufacturing,<sup>99</sup> and technology.<sup>100</sup> Finally, on the diplomatic front, China is eager to enjoy good ties with the Horn countries – particularly Ethiopia, which hosts the AU and enjoys a certain amount of clout at the continental level – as part of its efforts to build international partnerships in Africa and in the Global South more generally.

As part of its strategy in the region, China focuses most heavily on economic cooperation.

---

91 Aksoy, H.A., Cevik, S., Yasar, N.T. 2022. 'Visualizing Turkey's Activism in Africa', Berlin: Center for Applied Turkish Studies. For instance, the semi-public Maarif Foundation, which runs almost 200 schools across Africa, is present in Sudan, Ethiopia, Djibouti, and Somalia; the Yunus Emre Institute, which promotes the Turkish language and culture abroad, has offices in Khartoum and Mogadishu; and the Diyanet Foundation, which is responsible for managing religious affairs, is active in all Horn countries except for Eritrea. Maarif and the Presidency for Turks Abroad and Related Communities also offer numerous scholarships for African students to study in Turkey.

92 As of 2020, Turkish Airlines flew to Khartoum, Port Sudan, Juba, Asmara, Djibouti, Addis Ababa, Kebri Dehar, and Mogadishu. See: Aksoy, H.A., Cevik, S., Yasar, N.T. 2022. 'Visualizing Turkey's Activism in Africa', Berlin: Center for Applied Turkish Studies.

93 For instance, many loyalists in the al-Bashir regime in Sudan moved to Turkey after the fall of al-Bashir.

94 United States Institute for Peace. 2020. *China's Impact on Conflict Dynamics in the Red Sea Arena*, USIP Report, Washington D.C.: United States Institute for Peace, p. 17; Gower, A. 2020. 'US and China on collision course over sea trade routes', Azure Strategy, <https://azure-strategy.com/us-and-china-risk-disruption-of-maritime-chokepoints/> (accessed 10 October 2023); Eurostat. 2023. 'China-EU - international trade in goods statistics', [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=China-EU\\_-\\_international\\_trade\\_in\\_goods\\_statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=China-EU_-_international_trade_in_goods_statistics) (accessed 10 October 2023).

95 The Chinese logistics giant China Merchants Holdings has been engaged in the development and operation of Djibouti's two main ports (one of which is considered to be among Africa's busiest), and the submarine cable developed by Huawei Marine to connect South Asia

with East Africa and Europe transits through Djibouti. Global Construction Review. 2021. 'China Merchants signs deal for \$3bn expansion of Djibouti City port', Global Construction Review, 8 January, <https://www.globalconstructionreview.com/china-merchants-signs-deal-3bn-expansion-djibouti/> (accessed 10 October 2023); Africa Container Shipping. (n.d.). 'Top 10 Ports Africa Port Projects in West Africa', <https://africa-container-shipping.com/en/top-10-ports-africa-port-projects-in-west-africa/> (accessed 10 October 2023); Blaubach, T. 2022. *Connecting Beijing's Global Infrastructure: The PEACE Cable in the Middle East and North Africa*, MEI Policy Center, Washington D.C.: Middle East Institute.

96 The drop in oil exports from Sudan and South Sudan over the last decade has reduced the region's relevance as a source of energy imports for China. See: Patey, A., Olander, E. 2021. 'What's at stake for China in Sudan?', Copenhagen: Danish Institute for International Studies, accessed 10 October 2023)

97 Observatory of Economic Complexity. 2023. 'China', <https://oec.world/en/profile/country/chn> (accessed October 10 2023)

98 Endale A. 2020. 'Chinese Companies Taking over Ethiopia's Construction Industry', Ethiopian Business Review 8th Year No. 81. For a more detailed understanding of these companies' operations, see: Ding F. 2021. Networked Internationalization: Chinese Companies in Ethiopia's Infrastructure Construction Sector, *The Professional Geographer*, 73:2, 322-332.

99 Chen, W. 2022. 'China and Africa: Ethiopia case study debunks investment myths', *The Conversation*, 21 February <https://theconversation.com/china-and-africa-ethiopia-case-study-debunks-investment-myths-177098> (accessed 10 October 2023).

100 Meester, M. 2021. *Designed in Ethiopia; Made in China 'A Widening Partnership*, CRU Article, The Hague: Clingendael

Financing for large-scale projects is a hallmark of Beijing's engagement. Between 2000 and 2020, China provided loans worth USD 21 billion to the Horn countries (particularly Ethiopia), largely focusing on transport and power infrastructure.<sup>101</sup> In many instances, Chinese companies were involved in the projects' implementation.<sup>102</sup> While supporting the construction of large-scale infrastructure projects, this financing has increased the debt of several Horn countries (especially Ethiopia and Djibouti) vis-à-vis Beijing.<sup>103</sup> Besides using loans, China has also been an active investor in the region, with USD 4.3 billion of investment stock (around 10% of China's FDI in the whole of Africa) reported as of 2021, including the setting up of production facilities in Ethiopia.<sup>104</sup> Over the last few years, however, China has scaled back the

amount of loans provided to the region,<sup>105</sup> and its investments in countries like Ethiopia and Sudan have been threatened by conflict.<sup>106</sup>

In addition to economic cooperation, Beijing has also relied on other tools as part of its engagement in the Horn. On multiple occasions, China has leveraged its veto power at the UNSC to shield its allies from sanctions – most recently with Ethiopia during the war in Tigray.<sup>107</sup> In recent years, China has also stepped up its diplomatic engagement in the region, including by appointing a Special Envoy for the Horn of Africa.<sup>108</sup> So far, however, Beijing has refrained from taking an active role in mediating conflicts in the region. On the other hand, China's security presence has been increasingly visible. The Chinese navy has been long engaged in anti-

---

101 Ethiopia was by far the leading recipient, with EUR 13.7 billion, followed at a distance by Sudan with USD 4.8 billion. Transport and power accounted for USD 7.9 and 6.2 billion respectively. Other relevant sectors included ICT (3.1 billion), industry (2.3 billion), and water (1.5 billion). See: Boston University Global Development Policy Center. 2023. 'Chinese Loans to Africa Database', <https://www.bu.edu/gdp/chinese-loans-to-africa-database/> (accessed 10 October 2023).

102 For instance, Chinese constructors built the Ethiopia-Djibouti railway and Djibouti's new Doraleh Port. See: Xinhua. 2018. Chinese-built Ethiopia-Djibouti railway begins commercial operations, New China, 1 January, [http://www.xinhuanet.com/english/2018-01/01/c\\_136865306.htm](http://www.xinhuanet.com/english/2018-01/01/c_136865306.htm) (accessed 10 October 2023); Xinhua. 2017. Djibouti's Doraleh Port officially opens, New China, 25 April, [http://www.xinhuanet.com/english/2017-05/24/c\\_136312120.htm](http://www.xinhuanet.com/english/2017-05/24/c_136312120.htm) (accessed 10 October 2023).

103 In the case of Djibouti, the total debt obligation to Beijing stands at USD 1.2 billion, representing over 45 per cent of Djibouti's GDP. See: Malik, A., Parks, B., Russell, B., Lin, J., Walsh, K., Solomon, K., Zhang, S., Elston, T., and Goodman, S. 2021. 'Banking on the Belt and Road: Insights from a new global dataset of 13,427 Chinese development projects', Williamsburg, VA: AidData at William & Mary.

104 These investments were largely concentrated in Ethiopia (2.8 billion) and Sudan (1.1 billion). See: China Africa Research Initiative. 2023. 'Data: Chinese Investment in Africa', Washington D.C.: Johns Hopkins University; Chen, W. 2022. 'China and Africa: Ethiopia case study debunks investment myths', The Conversation, 21 February, <https://theconversation.com/china-and-africa-ethiopia-case-study-debunks-investment-myths-177098> (accessed 10 October 2023).

---

105 The post-pandemic period has witnessed a significant decrease in the amount of loans provided by China to African countries, with little more than USD 2 billion worth of new loans being committed in 2021-2022, as compared to USD 170 billion over the past 20 years. The last two years have also witnessed a geographical shift, with West Africa accounting for a growing share of loans. Moses, O., Hwang, J., and Engel, L. 2023. *A New State of Lending: Chinese Loans to Africa*, Boston University Global Development Policy Center, September 2023.

106 Fiala, L. 2021. 'Why Ethiopia's Fate Matters to China', Milan: Italian Institute for International Political Studies.

107 The Independent. 2021. 'Diplomats: UN fails to approve call to end Tigray violence', The Independent, 6 March, <https://www.independent.co.uk/news/diplomats-un-fails-to-approve-call-to-end-tigray-violence-ethiopia-india-russia-ireland-china-b1813330.html> (accessed 10 October 2023). In the past, China had shielded al-Bashir's government in Sudan during the Darfur war. See: Sudan Tribune. 2007. Russia, China and S. Africa object US, UK sanctions against Sudan, Sudan Tribune, 18 April, <https://sudantribune.com/article21768/> (accessed 10 October 2023).

108 Eickhoff, K., Godehard, N. 2022. 'China's Horn of Africa Initiative: Fostering or Fragmenting Peace', Working Paper 01, Berlin: Megatrends Africa; Reuters. 2022. China appoints new special envoy for turbulent Horn of Africa region, South China Morning Post, 22 February, <https://www.scmp.com/news/china/diplomacy/article/3167984/china-appoints-new-special-envoy-turbulent-horn-africa-region> (accessed 10 October 2023).

piracy operations in the region.<sup>109</sup> In addition, Beijing has been an important source of arms for some Horn countries (e.g. Sudan),<sup>110</sup> and it has deployed peacekeepers in UN missions in both Darfur and South Sudan.<sup>111</sup> Finally, China has also relied on soft power projection, sponsoring the opening of several of its Confucius Institutes (educational centres promoting the Chinese language and culture),<sup>112</sup> as well as providing scholarships for students from the region.<sup>113</sup>

## Russia

Over the past few years, Russia has added itself to the long list of foreign countries stepping up their engagement in the Horn.<sup>114</sup> This engagement, which is part of a broader effort to (re-)establish a presence in Africa at large,<sup>115</sup> is primarily driven by geopolitical considerations. Moscow is keen to bolster its network of alliances worldwide, which can provide it with some diplomatic support when this is needed. For instance, Horn governments traditionally closer to Moscow (Eritrea, Ethiopia, Sudan) have voted more favourably towards Russia during key UN discussions on the war in Ukraine.<sup>116</sup> Russia has also long been in discussions with Sudan's government to open a naval military facility in Port Sudan, which would grant Moscow a foothold in a geostrategic region.<sup>117</sup> In addition, Russia's engagement in the Horn is also driven by economic considerations. Gold smuggling from Sudan, for instance, has reportedly been used to beef up Russia's gold reserves (a useful counter-measure to Western sanctions), while also creating profits for Russian businesses elites.<sup>118</sup> In parallel, Moscow has also

109 Henry, J. 2016. *China's Military Deployments in the Gulf of Aden: Anti-Piracy and Beyond*, AsieVisions No 89, Paris: French Institute for International Relations.

110 Over the past twenty years, Khartoum has sourced around a quarter of its weapons from China, which continued to supply the government even as it became the subject of international condemnation during the conflict in Darfur. See: Stockholm International Peace Center Institute. 2023. 'SIPRI Arms Transfers Database' <https://www.sipri.org/databases/armstransfers> (accessed 10 October 2023); Sudan Tribune. 2006. Chinese arms in Darfur: the twisted trail of weapons, *Sudan Tribune*, 16 June, <https://sudantribune.com/article16778/> (accessed 10 October 2023)

111 China is the 5<sup>th</sup> largest contributor of troops to the UN Mission in the Republic of South Sudan (UNMISS), with 1,053 military staff. See: United Nations Mission to the Republic of South Sudan. 2023. 'Protecting civilians, monitoring human rights & supporting implementation of cessation of hostilities agreement', <https://peacekeeping.un.org/en/mission/unmiss> (accessed 10 October). It was also the 5<sup>th</sup> largest contributor to the AU-UN Hybrid Operation in Darfur (UNAMID), which was discontinued in late 2020. See: African Union/United Nations Hybrid Operation in Darfur. 2023. 'Protecting civilians, facilitating humanitarian aid & helping political process in Darfur', <https://peacekeeping.un.org/en/mission/unamid> (accessed 10 October).

112 Dig Mandarin. 2023. 'Confucius Institutes Around the World – 2023', <https://www.digmandarin.com/confucius-institutes-around-the-world.html> (accessed 10 October 2023). China opened Confucius Institutes in Ethiopia, Eritrea, and Sudan. As of the time of writing, the official list published by China's International Educational Exchange Information Platform no longer lists the centres in Eritrea and Sudan.

113 Xinhua. 2018. 'Chinese gov't provides more than 1,450 scholarships to Ethiopians in 2018', New China, 26 August, [http://www.xinhuanet.com/english/2018-08/26/c\\_137420265.htm](http://www.xinhuanet.com/english/2018-08/26/c_137420265.htm) (accessed 10 October 2023); Embassy of the People's Republic of China in South Sudan. 2022. 'The 2023/2024 Chinese Government Scholarship is now open for application', [http://ss.china-embassy.gov.cn/eng/ztyx/202210/t20221013\\_10783127.htm](http://ss.china-embassy.gov.cn/eng/ztyx/202210/t20221013_10783127.htm) (accessed 10 October 2023)

114 Ramani, S. 2020. *Engaged Opportunism: Russia's Role in the Horn of Africa*, Russian Foreign Policy Papers, Philadelphia: Foreign Policy Research Institute.

115 De Bruijne and Lanfranchi, 2022, *The Russians are coming!*, op. cit.

116 Ethiopia and Sudan abstained, while Eritrea consistently backed Russia's position. Al Jazeera. 2023. 'UN tells Russia to leave Ukraine: How did countries vote?', Al Jazeera, 24 February, <https://www.aljazeera.com/news/2023/2/24/un-tells-russia-to-leave-ukraine-how-did-countries-vote> (accessed 10 October 2023); Africaneews. 2022. 'African countries divided over UN vote against Russia', Africaneews, 13 October, [https://www.africanews.com/2022/10/13/african-countries-divided-over-un-vote-against-russia/](https://www.africaneews.com/2022/10/13/african-countries-divided-over-un-vote-against-russia/) (accessed 10 October 2023).

117 For an update on the progress of Russia's plan before the eruption of the war in Sudan in April 2023, see: Magdy, S. 2023. 'Sudan military finishes review of Russian Red Sea base deal', AP News, February 11, <https://apnews.com/article/politics-sudan-government-moscow-803738fb4d8f9145f0121067c118dd> (accessed 10 October 2023)

118 Collins, T. 2022. 'How Putin prepared for sanctions with tonnes of African gold', The Telegraph, 3 March, <https://www.telegraph.co.uk/global-health/terror-and-security/putin-prepared-sanctions-tonnes-african-gold/> (accessed 10 October 2023); Sudan Tribune. 2022. 'Sudan denies reports about alleged role in Russian gold reserves', Sudan Tribune, March 11, <https://sudantribune.com/article256257/> (accessed 10 October 2023).

tried to boost trade with Ethiopia, in an effort to diversify its trade links.<sup>119</sup>

Different from the economy-heavy strategies adopted by many of the other foreign countries that are active in the Horn, Russia's approach mostly revolves around security cooperation. Besides having military cooperation deals with several countries (Sudan, Ethiopia, Eritrea), Russia is a major supplier of arms to the region (Moscow accounted for around half of all weapon sales to both Ethiopia and Sudan over the past 20 years).<sup>120</sup> In addition, Russian's well-known Wagner Group has been deployed to Sudan, engaging in the training of security forces, opaque economic activities (particularly in the mining sector), as well as disinformation campaigns.<sup>121</sup> In parallel to this security toolbox, Russia has also deployed its diplomatic power to assist its allies in the region, for instance joining China in shielding the Ethiopian government from UN condemnation during the war in Tigray.<sup>122</sup>

This diplomatic support has been compounded by efforts to improve Russia's image in the region, including by sending occasional shipments of food aid to countries in need.<sup>123</sup> On the other hand, Moscow's economic footprint in the region has been limited, with only 1.5% of the Horn countries' trade taking place with Russia, and no major recorded productive investments.<sup>124</sup> Moscow has also not engaged in any meaningful development cooperation efforts, although it has at times offered debt relief to Horn countries (e.g. Ethiopia).<sup>125</sup>

## Implications for the Horn

The presence of many different foreign players advancing their own agendas has a profound impact for the Horn of Africa. One of the most notable consequences is the increased leverage available to Horn stakeholders vis-à-vis their foreign counterparts. The growing number of foreign actors willing to engage in the region means that actors within the Horn can choose from a broader range of potential partners. This allows them to avoid dependencies on any single partner, and to choose instead the

---

119 Africa Intelligence. 2023. 'Russia beefs up its trade diplomacy in Addis Ababa', *Africa Intelligence*, 5 June, <https://www.africaintelligence.com/eastern-africa-and-the-horn/2023/06/05/russia-beefs-up-its-trade-diplomacy-in-addis-ababa>, 109980051-bre (accessed 10 October 2023).

120 Stockholm International Peace Research Institute. 2023. 'SIPRI Arms Transfers Database', <https://www.sipri.org/databases/armtransfers> (accessed 10 October 2023).

121 For instance, Wagner has operated in Sudan's gold mining sector via a company named Meroe Gold, later renamed Al-Solag. The company has exploited connections with Sudanese officials to advance its business interests. Sharife, K., Dihmis, L., Klazar, E. 2022. 'Documents Reveal Wagner's Golden Ties to Sudanese Military Companies', *Organized Crime and Corruption Reporting Project*, 2 November, <https://www.occrp.org/en/investigations/documents-reveal-wagners-golden-ties-to-sudanese-military-companies> (accessed 10 October 2023); Africa Center for Strategic Studies. 2022. 'Mapping Disinformation in Africa', <https://africacenter.org/spotlight/mapping-disinformation-in-africa/> (accessed 10 October 2023).

122 Independent. 2021. 'Diplomats: UN fails to approve call to end Tigray violence', *Independent*, 6 March, <https://www.independent.co.uk/news/diplomats-un-fails-to-approve-call-to-end-tigray-violence-ethiopia-india-russia-ireland-china-b1813330.html> (accessed October 10 2023). Russia and China had also joined forces to protect Sudan's Omar al-Bashir during the conflict in Darfur in the 2000s. See: Sudan Tribune, 2007, 'Russia, China and S. Africa object US, UK sanctions against Sudan', *Sudan*

Tribune, 18 April, <https://sudantribune.com/article21768/> (accessed 10 October 2023).

123 Associated Press. 2023. 'Putin promises no-cost Russian grain shipments to 6 African countries', Associated Press, 27 July, <https://apnews.com/article/russia-putin-africa-summit-food-crisis-de317f5075d4b1719ade457f4eabbff82> (accessed 10 October 2023).

124 Trade data from: Observatory for Economic Complexity. 2023. 'The best place to explore trade data', <https://oec.world/en/> (accessed 10 October 2023). Russia has been relatively more relevant for Sudan (2.2%). Data for Djibouti was not available. As for investments, most Russian investments have been focused on the extractives sector, especially gold mining in Sudan. Economist Intelligence Unit. 2022. 'Russia-Ukraine war complicates Russian operations in Africa', [https://country.eiu.com/article.aspx?articleid=1561950939&Country=Egypt&topic=Economy&subtopic=Ope\\_2](https://country.eiu.com/article.aspx?articleid=1561950939&Country=Egypt&topic=Economy&subtopic=Ope_2) (accessed 10 October 2023).

125 Kunze, T., Salvador, L., Khrapak, M. 2022. *Blending development assistance and interest-driven foreign policy*, Monitor Development Policy No. 5/2021, Berlin: Konrad Adenauer Stiftung; The Moscow Times. 2019. 'Russia Vows to Forgive Ethiopia's Debts Amid Growing Push for Influence in Africa', 22 October, <https://www.themoscowtimes.com/2019/10/22/russia-vows-to-forgive-ethiopias-debts-amid-growing-push-for-influence-in-africa-a67851> (accessed 10 October 2023).

partnership(s) that are more conducive to their own interest. It also allows them to play various foreign actors against each other, potentially exploiting competition amongst them to elicit more support from them.

Such dynamics are not new to the Horn.<sup>126</sup> Djibouti, for instance, has played this game very effectively for a long time, repeatedly asking its foreign partners to pay higher rents for their military bases when new partners knocked on Djibouti's door to open a new base.<sup>127</sup> Similarly, Ethiopia has traditionally leveraged the interest of multiple external partners to interact with them from a position of strength. This has allowed Addis to simultaneously maintain fruitful ties with both Western and non-Western actors – for instance, receiving Chinese loans, Russian weapons, as well as Western aid and security cooperation.<sup>128</sup> In Sudan, Omar al-Bashir had also been very skilled in squeezing maximum support out of competing external partners, including for instance the Saudi-Emirati axis and the Qatari-Turkish one – though ultimately this double game led to some of these partners abandoning him.<sup>129</sup>

The more foreign partners are interested in the Horn, the easier it may be for actors in the region to play this game. Developments over the past few years seem to confirm this trend. During the recent Tigray war, for instance, the Ethiopian federal government could rely both

on the diplomatic backing of China and Russia within the UNSC and on the purchase of military drones from Turkey and the UAE.<sup>130</sup> This allowed the government to continue its military offensive until it had built enough leverage to reach a favourable negotiated settlement. The EU, which had condemned the federal government's human rights abuses during the conflict, was unable to exert any meaningful influence, and was sidelined in the negotiation process. Despite this, policy makers in many EU capitals have been eager to re-engage with Ethiopia in the wake of the Pretoria deal, partly due to the fear of losing influence in the region vis-à-vis other external actors.<sup>131</sup>

It is particularly important to note that the increased leverage available to Horn stakeholders is per se neither a positive nor a negative development for the region. On the one hand, political actors may use this leverage to strike deals that actually provide benefits for their country more generally. This could entail, for instance, imposing conditions on foreign investments that maximise benefits for the economy, or negotiating better deals for the restructuring of existing debts. On the other hand, however, political elites in the Horn may use their leverage to sustain exclusive and predatory domestic political settlements. This has long been the case, for instance, in Djibouti, where the government has used rents deriving from foreign military bases to consolidate power domestically, rather than to improve the population's living conditions.<sup>132</sup>

---

126 Lanfranchi, 2021, *Geopolitics meets local politics in the Horn of Africa*, op. cit.

127 When the US opened its base in 2002, for instance, the French bill reportedly increased by 70 per cent. Similarly, Djibouti's refusal to open the Russian base was reportedly rewarded with a 110 per cent increase in annual payments from the US, which had forcefully opposed a Russian presence in Djibouti. See: Meester, J., Van den Berg, W. 2018. *Ports & Power: the securitisation of port politics*, Horn of Africa Bulletin, The Hague: Clingendael, p. 18; Vertin, Z. 2020. 'Great Power Rivalry in the Red Sea: China's Experiments in Djibouti and Implications for the United States', Doha: Brookings Doha Center, p. 6-7.

128 De Bruijne and Lanfranchi, 2022, *The Russians are coming!*, op. cit., p. 26-27.

129 Abdelaziz, K., Georgy, M., El Dahan, M. 2019. Abandoned by the UAE, Sudan's Bashir was destined to fall, Reuters, 3 July, <https://www.reuters.com/investigates/special-report/sudan-bashir-fall/> (accessed 10 October 2023).

---

130 Walsh, D. 2021. Foreign Drones Tip the Balance in Ethiopia's Civil War, New York Times, 20 December, <https://www.nytimes.com/2021/12/20/world/africa/drones-ethiopia-war-turkey-emirates.html> (accessed 10 October 2023); Worley, W. 2022. 'Exclusive: Russia, China foiled UN meetings on Tigray famine, says Lowcock', devex, 21 June, <https://www.devex.com/news/exclusive-russia-china-foiled-un-meetings-on-tigray-famine-says-lowcock-103473> (10 October 2023).

131 Hoffmann and Lanfranchi, 2023, *Europe's re-engagement with Ethiopia*, op. cit.

132 Borowicz, J.E. 2017. 'Strategic Location and Neopatrimonialism in Djibouti', Thesis, Amsterdam: University of Amsterdam.

Another important consequence of the growing foreign presence is the risk of tensions among external powers spilling over into the region.

Such dynamics were most clearly on display over the past few years, as Middle Eastern countries (Saudi Arabia and the UAE on the one side, and Qatar and Turkey on the other) transposed their own regional rivalries onto the Horn, adding to the region's instability.<sup>133</sup> In Somalia, for instance, the two blocs supported different Somali factions, with Turkey and Qatar backing the FGS in Mogadishu, while the UAE was leaning closer to the administration of independentist Somaliland.<sup>134</sup> Such spillovers risk exacerbating political divides within the Horn, providing political backing and resources to conflicting parties, with the potential to exacerbate instability.

This spillover of tensions is particularly risky due to the power imbalance between Horn stakeholders and external actors. Many of these foreign actors have significant financial, military, and diplomatic power – think, for instance, of the large sums of money that Arab Gulf countries and China can commit to the region, or of the diplomatic clout that Russia and China have as permanent members of the UNSC. This creates an imbalanced relation with Horn stakeholders, which cannot generally match such power. This imbalance is further exacerbated by the fact that the Horn does not usually feature as a priority region for most foreign actors. Although there are many reasons as to why these actors are engaged in the Horn (see the previous section), all of them tend to have other foreign policy priorities – for instance, regional dynamics in the Middle East for the Arab Gulf countries and Turkey, or global geopolitical competition for China and Russia. As a result, the approach of foreign actors (including the EU) in the Horn risks being influenced by these external priorities, rather than by the needs and developments in the Horn itself.

---

<sup>133</sup> ICG, 2019, *Intra-Gulf Competition in Africa's Horn*, op. cit.

<sup>134</sup> ICG, 2018, *Somalia and the Gulf Crisis*, op. cit.

## Charting a strategic engagement for the EU

Besides impacting the Horn itself, the growing presence of foreign actors also impacts the EU's own engagement in the region. All foreign actors operate in the region according to their own strategy. When doing so, they engage with local stakeholders in the Horn, as well as with each other – thus creating a complex web of interactions between the region and the outside world. In this context, a strategic EU engagement in the Horn requires EU policy makers to be aware not only of the EU's own approach and its impact on the region, but also of the interactions with the strategies of other foreign players.

This section first explores the overlaps and the clashes between the regional approaches of the different foreign actors reviewed above. Based on this analysis, it then suggests options to manage the EU's engagement strategically in light of the Horn's increasingly crowded geopolitical landscape. In this regard, the brief suggests that such strategic engagement requires the EU to: cooperate with other foreign countries when this is useful (i.e. when complementarities can be leveraged for the benefit of both Horn countries and their foreign partners, the EU included); coexist with them when possible (i.e. when the actions of other foreign players do not damage the EU's interests); and compete with them when necessary (i.e. when those activities run against the EU's interests). This careful balance can allow the EU to maximize the benefits of its engagement, both for itself and for the region, without compromising the defence of its own interests.

### The EU's approach vs. that of other foreign actors

The presence of several foreign actors in the Horn is per se neither beneficial nor harmful to the EU's approach. At times, the other countries' interests and strategies may overlap with those of the EU, thereby opening up opportunities to work together on shared objectives in a way that can generate benefits for all actors involved, both within the Horn and outside. At other times,

these interests and strategies may instead clash, creating tensions and complicating the EU's efforts to advance its own strategy.

A review of the interests of the various foreign players engaged in the Horn shows that virtually all foreign countries that are active in the region share the EU's core interest in maritime security along the Bab el-Mandeb Strait. Although some of these countries are more directly reliant than others on trade flows through the Strait, none of them would benefit from any disruptions there. This shared interest has indeed been reflected in a considerable degree of cooperation among foreign players in support of anti-piracy efforts. Alongside the EU, many other actors have been actively engaged in this regard, including the Arab Gulf countries,<sup>135</sup> China,<sup>136</sup> and Turkey<sup>137</sup> – though such cooperation has also coexisted with a degree of geopolitical competition in the western Indian Ocean region.<sup>138</sup>

More broadly, most foreign actors also share the EU's interest in a stable Horn. Such an interest is most marked in the Gulf countries (particularly Saudi Arabia) – which, much more than Europe, receive large numbers of migrants from the Horn.<sup>139</sup> Besides migration concerns,

regional stability is beneficial for other countries, too, and for several reasons. For instance, stability creates better conditions for economic cooperation – one of the drivers underpinning the engagement of most foreign players in the Horn. Moreover, stability is also a key precondition for promoting economic development in the Horn, an objective that features not only on the EU's agenda,<sup>140</sup> but also in those of countries like China and Turkey.<sup>141</sup>

Despite these shared broad interests, however, the EU and other foreign players often have different views on how to achieve similar goals, such as stability and economic development. In Sudan, for instance, China's strategy during al-Bashir's rule entailed supporting the government in Khartoum, providing it with weapons to fight armed insurgencies in Darfur, as well as financing the development of the country's oil industry. At the very same time, European governments were imposing sanctions on the central government due to the atrocities committed in Darfur. This example reflects an overall difference between the Chinese and European approaches, with Beijing showing more openness to work with whatever government is in office in order to deliver on shared priorities.

---

135 Elmi and Mohammed, 2016. 'The Role of the GCC Countries in Edging Piracy in The Horn of Africa', op. cit.

136 Olander, E. 2022. New Chinese Naval Escort Task Force Joins Multinational Anti-Piracy Operations in the Gulf of Aden, *China Global South Project*, 19 October, <https://chinaglobalsouth.com/2022/10/19/new-chinese-naval-escort-task-force-joins-multinational-anti-piracy-operations-in-the-gulf-of-aden/> (accessed 10 October 2023).

137 Ersoy, E. 2023. 'Turkey's participation to bolster safety in Horn of Africa', ErsoyBilgehan <https://www.ersoybilgehan.com/publication-detail/turkeys-participation-to-bolster-safety-in-horn-of-africa/> (accessed 10 October 2023).

138 See, for instance, Lanfranchi and Meester, 2021, 'A careful foot can step anywhere', op. cit.

139 In 2022 alone, over 440,000 people moved from the Horn to the Arabian peninsula, mostly towards Saudi Arabia. See: IOM. 2023. '2022 Migrant Movements between the Horn of Africa and the Arabian Peninsula', [https://eastandhornofafrica.iom.int/sites/g/files/tmzbd1701/files/documents/IOM\\_Migration\\_Overview\\_Horn-of-Africa-Arabian-Peninsula\\_2022.pdf](https://eastandhornofafrica.iom.int/sites/g/files/tmzbd1701/files/documents/IOM_Migration_Overview_Horn-of-Africa-Arabian-Peninsula_2022.pdf) (accessed 10 October 2023); ACAPS. 2016. Mixed Migration - Central Mediterranean route: Horn of Africa to Europe, Briefing Note, Hay Riad Rabat: ACAPS. Although migrants

---

on their way to Europe take very different routes from those heading to the Arabian Peninsula (Marchand, K., Reinold, J., Dias e Silva, R. 2017. *Study on Migration Routes in the East and Horn of Africa*, Maastricht: Maastricht Graduate School of Governance), both the EU and Arab Gulf countries have a shared interest in reducing departures from the Horn, or in creating conditions that are more conducive for the return of migrants who have already made their journey.

140 Council of the EU, 2021, 'The Horn of Africa: a geo-strategic priority for the EU', op. cit.

141 Ministry of Foreign Affairs of the People's Republic of China. 2022. 'Wang Yi Talks about the "Initiative of Peaceful Development in the Horn of Africa"', [https://www.fmprc.gov.cn/mfa\\_eng/gjhdq\\_665435/2913\\_665441/3014\\_664044/3016\\_664048/202201/t20220107\\_10479933.html](https://www.fmprc.gov.cn/mfa_eng/gjhdq_665435/2913_665441/3014_664044/3016_664048/202201/t20220107_10479933.html) (accessed 10 October 2023); Presidency of the Republic of Turkey. 2022. 'Our aid to Somalia over the last decade totals more than a billion dollars', <https://www.tccb.gov.tr/en/news/542/138671/-our-aid-to-somalia-over-the-last-decade-totals-more-than-a-billion-dollars-> (accessed 10 October 2023).

Even starker divergences emerge among foreign actors when looking at geopolitical dynamics. In recent years, the EU's relations with China and especially with Russia have soured, and these tensions have threatened to spill over into the Horn. For instance, in the wake of Moscow's invasion of Ukraine, EU officials have pressured governments in the region to distance themselves from Russia.<sup>142</sup> These efforts have had little success, reflecting the lack of willingness among Horn governments to pick sides in global geopolitical disputes.<sup>143</sup> As for China, the EU's complicated relations with Beijing have translated into widespread scepticism among European policy makers about China's strong presence in the Horn (as well as in Africa generally). The EU's Global Gateway, for instance, is widely seen as a response to Beijing's BRI.<sup>144</sup> This scepticism has remained persistently strong over the past years, despite some evidence suggesting that there can be a degree of cooperation between the two sides in strengthening stability in the Horn.<sup>145</sup>

On the other hand, the EU's ties with the Gulf countries have shown an opposite pattern. Although the Gulf countries are viewed by Brussels as "strategic partners",<sup>146</sup> in the Horn

they have often acted in opposition to the EU's policies. In Sudan, for instance, Saudi Arabia and the UAE have consistently backed military rulers, while the EU has tried to support a transition towards democracy.<sup>147</sup> Similarly, the UAE has provided drones to the Ethiopian government in the midst of the Tigray war, while EU countries were pausing military cooperation with Addis over human rights violations in the war.<sup>148</sup> The UAE and Saudi Arabia have also cultivated strong ties with Eritrea, which is seen by the EU as a source of regional instability.<sup>149</sup>

These observations suggest that, when exploring the potential for cooperation with other foreign players active in the Horn, the EU should focus on common interests within the Horn itself, rather than projecting its patterns of global alliances into the region. Countries that are allies in certain regions may work against the EU's interests in the Horn (e.g. the UAE and Saudi Arabia), while countries that are not seen as partners in other domains may actually share some of the EU's interests in the Horn (e.g. China and Turkey). Cooperation with the latter set of countries is likely to be hard to implement, given the more limited coordination mechanisms in place between the EU and these

---

142 Sudan Tribune. 2022. 'Sudan snubs calls to condemn Russian invasion of Ukraine', *Sudan Tribune*, 28 February, <https://sudantribune.com/article255831/> (accessed 10 October 2023); Deutsche Welle. 2023. 'German, French ministers want African solidarity with Europe', *Deutsche Welle*, 13 January, <https://www.dw.com/en/german-french-ministers-want-african-solidarity-with-europe/a-64386310> (accessed 10 October 2023).

143 Countries that enjoyed good ties with Russia (e.g. Sudan, Ethiopia, Eritrea) have upheld these ties, and even the EU ally Kenya, which had unequivocally condemned Moscow's invasion of Ukraine, received a visit by the Russian Foreign Minister Sergey Lavrov in June 2023.

144 Bruegel. 2022. 'Global Gateway vs. Belt and Road Initiative', Event, <https://www.bruegel.org/event/global-gateway-vs-belt-and-road-initiative> (accessed 10 October 2023).

145 Ursu et al., 2018, *China and the EU in the Horn of Africa*, op. cit.

146 European External Action Service. 2022. 'Joint Communication to the European Parliament and the Council - A strategic partnership with the Gulf', [https://www.eeas.europa.eu/eeas/joint-communication-%E2%80%9Cstrategic-partnership-gulf%E2%80%9D\\_en](https://www.eeas.europa.eu/eeas/joint-communication-%E2%80%9Cstrategic-partnership-gulf%E2%80%9D_en) (accessed 10 October 2023).

---

147 Gallopin, J.B. 2020. 'Bad company: How dark money threatens Sudan's transition', Berlin: European Council of Foreign Relations.

148 Al Jazeera. 2021. 'UAE air bridge provides military support to Ethiopia govt', Al Jazeera, 25 November, <https://www.aljazeera.com/news/2021/11/25/uae-air-bridge-provides-military-support-to-ethiopia-govt> (accessed 10 October 2023); Decode 39. 2022. 'Italy suspends military cooperation with Ethiopia, follows US lead', Decode 39, 7 February, <https://decode39.com/2797/italy-military-cooperation-ethiopia/> (accessed 10 October 2023); Ahram Online. 2021. 'France suspends military cooperation with Ethiopia', Ahram Online, 13 August, <https://english.ahram.org.eg/NewsContent/2/10/418990/World/Africa/-France-suspends-military-cooperation-with-Ethiopi.aspx> (accessed 10 October 2023).

149 Phillips, C. 2023. 'How Yemen war provided unexpected boost to Eritrea and Somaliland', Middle East Eye, 27 April, <https://www.middleeasteye.net/opinion/yemen-war-africa-unexpected-boost-eritrea-somaliland> (accessed 10 October 2023).

countries.<sup>150</sup> However, owing to its potential benefits for both the Horn and the foreign actors involved, it is worth being explored.

With this in mind, the following subsections explore concrete potential entry points for cooperation between the EU and other foreign actors, while also reflecting on domains where cooperation is likely to be more difficult – if not impossible.

### **Cooperating when useful: Infrastructure development and humanitarian aid**

The analysis conducted above shows that several of the foreign players that are active in the Horn share the EU's interest in promoting economic development in the region – partly out of a desire to improve the population's living conditions, and partly in order to create new opportunities for their own economies and companies. The ways in which various foreign players go about this goal may differ, but they need not be in opposition with each other. Rather, at times they could be complementary, or at least compatible with each other. This may create interesting entry points for cooperation between the EU and other actors.

#### *Infrastructure development*

Infrastructure development is a field where there is a potential for cooperation – or at least coordination – between the EU and other foreign actors. Improving infrastructure is key to promoting sustainable economic development in the region, where infrastructure needs are very high.<sup>151</sup> As a result, Horn governments have

been eager to attract foreign investment and companies to support their efforts to improve infrastructure. At the same time, many foreign actors have shown an interest in engaging in this domain. The EU – together with Horn governments and multilateral development partners – has supported infrastructure projects through the Horn of Africa Initiative (HoAI).<sup>152</sup> In parallel, many other actors – particularly China, Turkey, and the UAE – have also been very active in the same domain, financing, implementing and/or operating major infrastructure projects.<sup>153</sup> As noted earlier, some of these countries share the EU's objective to promote economic development in the region, thus creating a meaningful entry point for concrete cooperation.

Despite a degree of shared interest, the engagement of many foreign actors has generated some competition in the infrastructure domain. For instance, the Gulf countries and Turkey have used infrastructure investments in the Horn as part of their regional struggle for power,<sup>154</sup> and the EU's Global Gateway has been widely seen as a reaction to China's

---

150 According to a European diplomat interviewed for this study, for instance, European policy makers have so far not been either willing or able to discuss Africa policy in Beijing, and European embassies have reported no meaningful engagement with their Chinese counterparts. Even in South Sudan, where a degree of interaction has to take place due to the large Chinese contingent within UNMISS, no meaningful cooperation has taken place. On the other hand, the existence of established channels of communications with the Gulf countries make it easier to start conversations on relevant issues, despite the lack of shared interests.

151 African Development Bank Group. (n.d.). 'Infrastructure', <https://www.afdb.org/en/topics-and-sectors/initiatives-partnerships/fragility-resilience/promoting-infrastructure>

[private-investment-in-transition-countries/the-horn-of-africa-opportunity/sector-opportunities/infrastructure](https://private-investment-in-transition-countries/the-horn-of-africa-opportunity/sector-opportunities/infrastructure) (accessed 10 October 2023).

152 Horn of Africa Initiative. (n.d.). 'The Horn of Africa Initiative', <https://www.hoainitiative.org/> (accessed 10 October 2023).

153 Examples of major projects supported by foreign actors are the following: for China, the Ethio-Djibouti railway, the Ethio-Djibouti water project, the Doraleh Multi-Purpose Port, and the PEACE submarine cable; for Turkey, the airport and seaport of Mogadishu, the El Mek Nimr and Al-Halfaya bridges in Khartoum, and the Awash-Kombolcha-Hara Gebaya railway in Ethiopia; for the UAE, the ports of Berbera and Bosasso in Somaliland and Puntland, as well as the road connection between Berbera and the Ethiopian border town of Togochale. Qatar had also signed a large USD 4 billion deal to develop, together with Turkey, Sudan's port of Suakin, though the project was stalled after al-Bashir's fall in 2019.

154 Dudley, D. 2018. 'East Africa Becomes A Testing Ground For UAE And Qatar As They Battle For Influence And Opportunity', Forbes, 4 April, <https://www.forbes.com/sites/dominicdudley/2018/04/04/uae-qatar-horn-of-africa-proxy-dispute/?sh=4657a236ad2> (accessed 10 October 2023).

BRI.<sup>155</sup> On the one hand, this competition may be harmful for the Horn if the strategic interests of external players take precedence over local needs, or if local elites (mis)use external support to advance their own narrow political agendas.<sup>156</sup> On the other hand, competition among foreign players may generate benefits for the Horn if it serves to stimulate an inflow of financing for infrastructure projects that can benefit the population at large.<sup>157</sup>

The EU, in close cooperation with Horn governments, should explore how to maximize the benefits of this competition, exploiting complementarities between the efforts of different foreign players, as well as focusing on the added value that the EU can bring to the table. This kind of approach, however, requires the EU to abandon the idea that support for infrastructure projects, such as that provided via the Global Gateway, can be leveraged as a tool to gain geopolitical influence vis-à-vis rivals such as China.<sup>158</sup> This would be a welcome step: governments in the Horn – much like those in the rest of Africa – have shown that they are not willing to pick sides in global disputes that do not directly concern them,<sup>159</sup> and this calculus is unlikely to change merely in response to more EU support for infrastructure development.

In concrete terms, in order to maximise its own added value, the EU could focus on addressing bottlenecks that prevent existing infrastructure projects (some of which have been backed by other foreign actors) from having their desired impact. For instance, the Ethio-Djibouti railway has been repeatedly reported to operate below capacity due to a variety of constraints,

including power outages.<sup>160</sup> As part of broader efforts to improve access to electricity in Ethiopia and Djibouti, the EU could support projects that address power outages along the railway line – which would result in maximizing the impact of existing infrastructure. Similarly, the EU could support inland infrastructure to connect the sprawling network of (often foreign-backed) commercial ports on the Horn's shores with other locations within the region. The EU's planned support for regional infrastructure networks as part of the HoAI is a step in this direction.<sup>161</sup> The implementation of these projects faces significant obstacles, however, including persistent political instability, as well as a dubious commitment by political elites towards regional integration.<sup>162</sup>

The EU could also focus its efforts on supporting small-scale, community-led infrastructure projects. These can entail, for instance, the construction or rehabilitation of hospitals, schools, roads to connect remote localities to nearby markets, as well as off-grid renewable energy projects enabling access to electricity in isolated areas. These projects are less visible than the large-scale infrastructure projects supported by China and the UAE,<sup>163</sup> but have

---

160 Fortune. 2020. 'Ethio-Djibouti Railway Vows to Reserve Losses', Fortune, 19 September, <https://addisfortune.news/ethio-djibouti-railway-vows-to-reverse-losses/> (accessed 10 October 2023); Tarrossy, I., Vörös, Z. 2018. 'China and Ethiopia, Part 2: The Addis Ababa–Djibouti Railway', The Diplomat, 22 February, <https://thediplomat.com/2018/02/china-and-ethiopia-part-2-the-addis-ababa-djibouti-railway/> (accessed 10 October 2023).

161 Horn of Africa Initiative. 2021. 'Horn of Africa Initiative: Supporting Recovery Through Deepening Economic Integration and Promoting Regional Cooperation', <https://www.hoainitiative.org/wp-content/uploads/2021/03/HoAI-Project-Profiles.pdf> (accessed October 10 2023). The HoAI includes projects for the creation of four regional economic corridors (Kismayo-Lamu-Mogadishu, Assab-Djibouti, Berbera-Djibouti, Mogadishu-Berbera-Bosasso), at a total cost of USD 9 billion – making up almost 60% of the initiative's whole budget.

162 Governments within the Horn have traditionally prioritized the development of infrastructure geared towards obtaining goods for exports to international markets (usually via seaports), so as to gain access to hard currency.

163 See, for instance, the visibility of China's Ethio-Djibouti railway, or the UAE's Berbera Port facility.

been proven to have a strong development impact, particularly when designed and implemented with the thorough engagement of local communities.<sup>164</sup> EU support for these projects does not exclude the possibility of other foreign actors continuing to support larger-scale infrastructure projects – on the contrary, receiving backing from different foreign actors may help Horn countries to develop the different types of infrastructure that they need.

Cooperation opportunities between the EU and other foreign players on infrastructure development may be explored in Ethiopia. Owing to the country's size, as well as to its economic and diplomatic clout in the Horn and beyond, most foreign players share the EU's interest in maintaining a degree of stability in Ethiopia, as well as in creating opportunities for economic exchanges with its economy. As a result, supporting the development of the country's infrastructure has been an important part of the strategy not only of the EU, but also of China, Turkey, as well as the UAE.<sup>165</sup> The recent conflict and the ensuing instability have made long-term investments in the country much less appealing, however. This may lead Ethiopia's foreign partners to reconsider their willingness to support infrastructure projects in the country, pivoting instead to more stable neighbouring countries such as Kenya.

---

164 Lanfranchi, G. 2021. 'If you want to go far, go together' *Community engagement and infrastructure development in fragile settings*, Policy Brief, The Hague: Clingendael.

165 Horn of Africa Initiative. 2021. 'Horn of Africa Initiative: Supporting Recovery Through Deepening Economic Integration and Promoting Regional Cooperation', <https://www.hoainitiative.org/wp-content/uploads/2021/03/HoAI-Project-Profiles.pdf> (accessed 10 October 2023); Huang, Z., Goodfellow, T. 2022. *Centralizing Infrastructure in a Fragmenting Polity: China and Ethiopia's 'Infrastructure State'*, In: *The Rise of the Infrastructure State*, Bristol: Bristol University Press; Chen, Y. 2021. 'Laying the Tracks - The political economy of railway development in Ethiopia's railway sector and implications for technology transfer' GCI Working Paper 014, Boston: Global Development Policy Center; Reuters. 2023. 'Ethiopia signs deal with UAE's Masdar for 500 MW solar plant', Reuters, 18 January, <https://www.reuters.com/business/energy/ethiopia-signs-deal-with-uaes-masdar-500-mw-solar-plant-2023-01-18/> (accessed 10 October 2023).

### ***Humanitarian aid***

Besides infrastructure development, humanitarian aid is another domain where there is a potential for cooperation among the EU and some of the other foreign players that are active in the Horn. As shown above, the EU is a large provider of humanitarian assistance in the region as part of its goal to improve the population's living conditions. At the same time, the UAE, Saudi Arabia, Qatar, and Turkey are also very active in the humanitarian domain.<sup>166</sup> Cooperation among these actors, however, is not a straightforward exercise, given that there are significant differences in the way in which they deliver aid. On the one hand, the EU allocates a larger share of its aid in the Horn via multilateral organizations, and tends to work more regularly with UN agencies and a different set of (international) NGOs.<sup>167</sup> On the other hand, the Gulf countries and Turkey tend to deploy humanitarian aid bilaterally, in direct coordination with governmental counterparts, and with a prominent role for (often Islamic) charities.<sup>168</sup>

In recent years, however, some Middle Eastern countries have shown an increasing willingness to engage with other humanitarian donors. Qatar has been at the forefront of

---

166 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 51-57. By contrast, the engagement of global actors like China and Russia tends to be limited to ad hoc contributions See: Nyabiage, J. 2022. 'China sends food aid to drought-stricken Horn of Africa as accusations fly', South China Morning Post, 23 July, <https://www.scmp.com/news/china/diplomacy/article/3186308/china-sends-food-aid-drought-stricken-horn-africa-accusations> (accessed 10 October 2023); The Ministry of Foreign Affairs of the Russian Federation. 2023. 'Foreign Minister Sergey Lavrov's remarks at a joint news conference with Minister of Foreign Affairs and International Cooperation of Somalia Abshir Omar Jama following talks, Moscow, May 26, 2023', [https://mid.ru/en/foreign\\_policy/news/1872546/](https://mid.ru/en/foreign_policy/news/1872546/) (accessed October 10 2023).

167 For instance, a European diplomat working in humanitarian affairs in Sudan reported that cooperation in the field was limited due to this discrepancy between the EU's focus on multilateral channels, versus the Gulf countries' and Turkey's preference to proceed bilaterally.

168 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit..

this effort, channelling an increasing share of its humanitarian financing via multilateral organizations.<sup>169</sup> In the Horn specifically, Qatar has also actively sought cooperation with Western donors, for instance by supporting a UN-based fund for Darfur, as well as by seeking closer coordination between its own charities and other international NGOs.<sup>170</sup> On both occasions, these efforts did not achieve the desired results, partly due to the reluctance of Western actors to engage with Qatar.<sup>171</sup> Yet, these efforts signal that there are some entry points for cooperation between the EU and Qatar in providing humanitarian aid to the Horn.

Entry points for cooperation exist with other countries, too. As for Turkey, Ankara's engagement of civil society actors arguably mirrors the EU's approach more closely than that of any other actors,<sup>172</sup> thus potentially offering some room for cooperation. Similar to Qatar, Saudi Arabia channels a significant share of its official development assistance via multilateral channels, according to OECD data.<sup>173</sup> As for the UAE, Abu Dhabi has been more reluctant

to channel aid through multilaterals, but it has sought to position itself as a key hub in the global humanitarian architecture, both as a financial player and as a logistical hub.<sup>174</sup> Cooperation on humanitarian affairs may be explored with China, too. While still contributing very little as compared to its size, Beijing has been increasing its humanitarian engagement in recent years, including through multilateral channels.<sup>175</sup> According to existing research, entry points for cooperation with Western donors include food security and crisis response preparedness<sup>176</sup> – two domains where the needs in the Horn are particularly high.

Cooperation between the EU and other actors could take different forms. An increased exchange of information (e.g. on needs assessments) and best practices among various donors and their networks of implementing partners (e.g. NGOs, charities) are low-hanging fruits for cooperation. Foreign actors could also assist each other in accessing hard to reach areas, if they would agree to leverage their own local networks to enable access for each other's implementing partners. In some cases, cooperation could also entail funding for joint multilateral initiatives – most notably via the UN, through which a large share of the EU's humanitarian funding is already channelled. This, however, would require other foreign actors to renounce the visibility (and hence the potential leverage) that comes with providing aid bilaterally. In terms of thematic priorities, with over 20 million people in the Horn facing severe hunger,<sup>177</sup> food security is a potential priority area where cooperation among foreign actors could take place.

---

169 As of 2017, Doha reportedly disbursed over 43% of its humanitarian financing via multilaterals. Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 55-57; Barakat, S. 2019. *Priorities and challenges of Qatar's Humanitarian Diplomacy*, CMI Brief No. 7, Bergen: Chr. Michelsen Institute.

170 In the 2010s Doha requested Western countries to contribute to financing the UN-based Darfur Fund, while more recently the government-linked Qatar Charity tried to join the Sudan INGO Forum, a coordination forum largely populated by organizations with strong links to Western donors. Interviews with a former UN official and an INGO representative in Sudan, September 2022.

171 For instance, Qatar ended up contributing over 95% of the UN Darfur Fund. See: United Nations MPTF Office Partner Gateway. (n.d.). 'United Nations Fund Darfur', <https://mptf.undp.org/fund/drft00> (accessed 10 October 2023).

And Qatar Charity's application to the Sudan INGO Forum was reportedly stalled by other members. Interviews with a former UN official and an INGO representative in Sudan, September 2022.

172 Donelli, F. 2018. 'The Ankara consensus: the significance of Turkey's engagement in sub-Saharan Africa', *Global Change, Peace & Security* 30:1, 57-76, p. 59.

173 OECD. 2023. 'Development Cooperation Profiles - Saudi Arabia', <https://www.oecd-ilibrary.org/sites/b2156c99-en/index.html?itemId=/content/component/b2156c99-en> (accessed 10 October 2023).

174 Mosley, 2021, 'Turkey and the Gulf States in the Horn of Africa', op. cit., p. 54-55.

175 Friesen, I., and Janauschek, L. 2021. *EU-China Engagement in Humanitarian Aid: Different Approaches, Shared Interests?*, German Development Institute, Briefing Peper 11/2021.

176 Ibid.

177 World Food Programme. 2023. 'Horn of Africa hunger crisis pushes millions to the brink', <https://www.wfp.org/stories/horn-africa-hunger-crisis-pushes-millions-brink> (accessed 10 October 2023).

The potential for cooperation between the EU and other foreign players on humanitarian affairs is particularly high in Somalia. More than 8 million people are estimated to need humanitarian assistance in the country, and the EU has responded by providing over EUR 500 million over the past six years.<sup>178</sup> Other foreign players – particularly Turkey, Qatar, and Saudi Arabia – have also been very active in this domain.<sup>179</sup> Cooperation among these foreign actors is also made possible by the fact that they all recognize and support the internationally recognized Federal Government of Somalia (FGS). China and Russia also support the FGS, but their humanitarian contributions to the country have been negligible.<sup>180</sup> The UAE's relations with the FGS, on the other hand, have been more troubled over the past few years, although recent rapprochement during the last year has unlocked increased humanitarian cooperation.<sup>181</sup>

### **Coexisting when possible, competing when necessary**

Outside of the economic development and humanitarian domains, it is likely to be harder for the EU to actively cooperate with other foreign

players that are active in the Horn. In the security domain, the current levels of coordination on anti-piracy may be maintained, given the strong shared interest by all foreign players in ensuring maritime security in the region. However, growing tensions at the geopolitical level will make it more difficult to step up cooperation on sensitive security matters. In fact, given the Horn's geostrategic relevance, the decision by any foreign player to establish a security presence in the region tends to be met with a great deal of scepticism by other external actors, even when such a presence is relatively limited (see, for instance, the debates associated with Turkey's military training base in Somalia).<sup>182</sup>

At the same time, however, the past decades have shown that there can be some scope for the EU's security engagement to coexist with that of other foreign actors in certain circumstances. Djibouti, for instance, has maintained an extremely close security and defence partnership with France and has hosted troops from multiple EU countries, while also allowing China to open a military base on its territory. Similarly, Ethiopia has traditionally enjoyed a close partnership with the EU on regional peace and security issues and on counter-terrorism, while at the same time relying on Russia for a large share of its arms imports.<sup>183</sup> In some cases, the EU has also provided security support for the same actors backed by other foreign players – in Somalia, for instance, both the EU and Turkey have contributed towards building the capacity of the Somali National Army under the FGS' control. Although the EU's underlying motives may differ from those of other actors, these examples show that a degree of coexistence concerning their efforts is possible.

---

178 European Civil Protection and Humanitarian Aid Operations. 2023. 'Somalia', [https://civil-protection-humanitarian-aid.ec.europa.eu/where/africa/somalia\\_en](https://civil-protection-humanitarian-aid.ec.europa.eu/where/africa/somalia_en) (accessed 10 October 2023).

179 Turkey has made humanitarian assistance a cornerstone of its engagement in the country, while Qatar and Saudi Arabia have ranked among the leading providers of humanitarian aid. Presidency of the Republic of Turkey. 2022. 'Our aid to Somalia over the last decade totals more than a billion dollars', <https://www.tccb.gov.tr/en/news/542/138671/-our-aid-to-somalia-over-the-last-decade-totals-more-than-a-billion-dollars-> (accessed 10 October 2023); Altunisik, M.B. 2022. 'Humanitarian diplomacy as Turkey's national role conception and performance: evidence from Somalia and Afghanistan', *Southeast European and Black Sea Studies*, 1–17; United Nations Somalia. 2021. 'Aid Flows in Somalia', p. 8.

180 Ibid., p. 10.

181 Middle East Monitor. 2023. 'Somalia, UAE strike security deal in push to mend fences', Middle East Monitor, 5 January, <https://www.middleeastmonitor.com/20230105-somalia-uae-strike-security-deal-in-push-to-mend-fences/> (accessed October 2023); Shakour, A. 2022. Somalia praises UAE for its relief efforts in the country, Arab News, 7 December, <https://www.arabnews.com/node/2212146/middle-east> (accessed 10 October 2023).

---

182 Rossiter, A., Cannon, B.J. 2019. 'Re-examining the "Base" The Political and Security Dimensions of Turkey's Military Presence in Somalia, *Insight Turkey*, 21(1), 167–188.

183 Ashenafi, N. 2016. Ethiopia, EU sign 'strategic engagement' agreement, *The Reporter*, 2 July, <https://www.thereporterethiopia.com/4234/> (accessed 10 October 2023); De Bruijne and Lanfranchi, 2022, *The Russians are coming!*, op. cit., p. 26–30.

Alongside security, diplomacy is another domain where cooperation is set to be difficult. This is due to the fact that, despite an often shared interest in preventing the escalation of conflicts in the short term, the foreign players that are most active in conflict mediation in the region tend to have long-term positions that run contrary to the EU's approach. Saudi Arabia, for instance, shares the EU's desire to restore a degree of stability in Sudan as soon as possible, but has consistently supported military rule in the country – a position that is at odds with that of Brussels. Similarly, the UAE's efforts to mediate on issues such as the Al-Fashaga border dispute and the GERD are consistent with the EU's desire to avoid an escalation of tensions in the region. Yet, both in Sudan and Ethiopia the UAE has adopted policies that have run against the EU's efforts, supporting military leaders in Khartoum and aiding the federal government's armed forces during the Tigray war.

At times, the approach to peace building adopted by other foreign players may also be just too different from that of the EU. For instance, China's approach largely focuses on engagement with incumbent governments and the prioritization of economic development issues – as opposed to the EU's engagement of civil society actors and its prioritization of governance.<sup>184</sup> While this does not make the two approaches incompatible by default, it does make cooperation difficult to implement.<sup>185</sup> In fact, the proliferation of different mediation initiatives may actually undermine the EU's own diplomatic efforts, for instance by enabling the warring parties to join initiatives where they are not subject to condemnation by the EU for human rights violations.

In cases such as these, EU policy makers should carefully analyse the impact that the engagement of foreign countries has on its own interests, and decide how to respond accordingly. If these countries' activities directly undermine the EU's own engagement, then

the EU should take active measures aimed at minimizing these countries' influence. On the other hand, if the activities of foreign actors do not affect the EU and its interests, then a degree of coexistence with them would be possible – in fact, desirable, given that triggering dynamics of competition without that being needed would amount to a waste of attention and resources. The analysis of whether or not foreign activities damage the EU's own engagement should be based on a thorough reflection on the specific objectives that the EU has in the region, as well as in the specific countries in question – and, as noted above, should not be merely a reflection of competition or cooperation dynamics at the global level or in other regions.

So far, Sudan has arguably been the country in the Horn where the EU's interests have clashed most clearly with those of other foreign players. On the one hand, since the fall of al-Bashir in 2019, the EU has tried to support a transition towards democracy and civilian rule. On the other hand, the other foreign actors engaged in Sudan have either actively supported the country's military rulers (e.g. the UAE, Saudi Arabia, Russia), or enjoyed good ties with the former regime (e.g. China, Turkey, Qatar). The UAE and Russia have also been engaged in the smuggling of vast quantities of gold out of the country, which has contributed to fuelling conflict and instability across the country.<sup>186</sup> In addition, Russia has reportedly used gold smuggled out of Sudan to build up its own gold reserves, which it has used to insulate its economy from the economic sanctions imposed by the EU and its partners after the invasion of Ukraine.<sup>187</sup> In this context, the EU should take active steps

---

186 Global Witness. 2020. *Beneath the Shine: A Tale to Two Gold Refiners*, Report, London: Global Witness; Olivier, M. 2021. *Russia/Africa: Wagner, an investigation into Putin's mercenaries*, *The African Report*, 28 July, <https://www.theafricanreport.com/112649/russia-africa-wagner-an-investigation-into-putins-mercenaries/> (accessed 10 October 2023).

187 Collins, T. 2022. 'How Putin prepared for sanctions with tonnes of African gold', *Telegraph*, 3 March, <https://www.telegraph.co.uk/global-health/terror-and-security/putin-prepared-sanctions-tonnes-african-gold/> (accessed 10 October 2023).

to counter the damaging influence of other foreign players. This may entail, for instance, exposing and targeting the shadowy UAE-based business networks that channel revenue to Sudan's war economy,<sup>188</sup> as well as targeting Russian businesses involved in the smuggling of Sudanese gold.<sup>189</sup>

## Conclusions and recommendations

This brief has explored the engagement of the EU in the Horn of Africa, in light of the growing regional presence of other foreign actors, namely the UAE, Saudi Arabia, Qatar, Turkey, China, and Russia.

While each of these actors tends to have its own specific priorities, the engagement of all of them is underpinned by a mix of historical, geopolitical, and economic considerations. Maritime security – one of the EU's core interests – is a shared concern for the vast majority of foreign actors, with many of them being actively engaged in anti-piracy efforts. The EU's interest in stability in the Horn is also shared by others, although different actors often use different approaches to achieve such stability. In Sudan, for instance, both the EU and Saudi Arabia are keen to avoid instability, but while Brussels has pushed for a transition towards democracy and civilian rule, Riyadh has consistently supported Sudanese security actors resisting the transition.

The various foreign players that are active in the Horn also differ with respect to what they have to offer to the region. All of them generally leverage a broad range of tools, including diplomacy, financial resources, security assistance, as well as soft power. However, their specific strength tends to lie in different domains: the Gulf countries provide large sums of direct financial

assistance; China makes loans available for large-scale infrastructure projects; Russia is a major provider of weapons; and Turkish charities and companies have earned a reputation for their effective engagement. The EU, on the other hand, stands out as a leading provider of humanitarian and development assistance, two domains where it would be difficult for any other foreign actor to replace the EU.

In this context, this brief offers the following recommendations for EU policy makers, with a view to charting a strategic engagement for the EU in an increasingly crowded Horn of Africa.

### 1. Reassess the EU's own interests and priorities in the Horn

At the time of writing, the May 2021 EU Council Conclusions "The Horn of Africa: a geo-strategic priority for the EU" is the most recent publicly available document detailing the EU's approach to the Horn.<sup>190</sup> This document lists a number of domains in which the EU is interested and engaged, and briefly spells out the bloc's position vis-à-vis different Horn countries. However, it does not provide a clear overview of what is actually at stake for the EU in the region (i.e. its interests), what its priorities are (i.e. which goals and outcomes does the EU want to achieve), and what is the best way for the EU to pursue these priorities (i.e. through which specific tools).

As a basis for any strategic engagement by the EU, policy makers should conduct a thorough internal debate on these issues. The concrete outcome of this discussion could be a document that spells out the following: (i) the reasons why the Horn of Africa is a relevant region for the EU, in a rough order of priority; (ii) the objectives that the EU wants to achieve in the region, in a rough order of priority, based on the interests previously identified; (iii) the tools that are available to the EU to shape developments in the region; and (iv) the ways in which these tools can be mobilized in order to achieve the identified objectives. Such a process would likely

---

188 Hoffmann, A., Lanfranchi, G. 2023. *To stop the war in Sudan, bankrupt the warlords*, CRU Alert, The Hague: Clingendael.

189 Sharife, K., Dihmis, L., Klazar, E. 2022. 'Documents Reveal Wagner's Golden Ties to Sudanese Military Companies', Organized Crime and Corruption Reporting Project, 2 November <https://www.occrp.org/en/investigations/documents-reveal-wagners-golden-ties-to-sudanese-military-companies> (accessed 10 October 2023).

---

190 Council of the EU, 2021, 'The Horn of Africa: a geo-strategic priority for the EU', op. cit.

be complicated, not least due to the difficulties of breaking away from an already established approach, as well as to divergences among member states. Yet, it is a necessary step towards providing the framework within which the EU engagement could take shape over the next few years, if not decades.

## **2. Focus on actors that share the EU's interests and values**

Although the presence of other foreign actors has meaningful implications for the EU, the bloc's engagement in the region should be first and foremost guided by its ties with the Horn itself. With international tensions rising, particularly after Russia's invasion of Ukraine, there is a risk that geopolitical dynamics override any other considerations when charting the EU's approach to a region like the Horn. This would be a mistake. As argued elsewhere in the case of Ethiopia, for instance, a hasty re-engagement with the federal government, driven by the fear of losing Addis to other global players, would risk not only damaging the EU's reputation, but also undermining the prospects for lasting peace in Ethiopia itself.<sup>191</sup> This, in turn, would run against the EU's own interests in the long term.

More broadly, this suggests that the EU's approach should not be geared towards keeping relevant stakeholders out of the orbit of its geopolitical rivals, but should rather focus on deepening ties with partners that share the bloc's interests and values. In cases where governments do not share the EU's vision, the bloc may strengthen ties with other partners, such as independent civil society or private sector actors. In Sudan during al-Bashir's dictatorship, for instance, this strategy was successfully employed by some EU member states, which managed to cultivate ties with some of the civil society actors that eventually spearheaded the 2019 Revolution. Such an approach promises to deliver more stable and reliable partnerships, which can better serve the EU's interests in the long term.

---

<sup>191</sup> Hoffmann and Lanfranchi, 2023, *Europe's re-engagement with Ethiopia*, op. cit.

## **3. Focus on the EU's added value: Development cooperation**

The growing presence of other foreign actors can make it more complex for the EU to engage in the Horn, as stakeholders from the region enjoy a broader array of potential partners from which to choose. In this context, it is critical for the EU to assess in which areas it has an added value that it can offer to the region, and to focus its engagement on these areas. This brief has shown that the EU stands out as a leading partner for the Horn in terms of development cooperation and humanitarian aid. The EU's humanitarian budget is mostly channelled through multilateral organizations, making it difficult for EU policy makers to have direct control over its use. On the other hand, however, the EU has control over its development budget, and it could consider how to leverage it more strategically in order to achieve its objectives.

The EU's investment in infrastructure development through the Global Gateway is a good example in this regard. This initiative has been framed in many different ways: as a development tool in support of the SDGs, as a way to engage the European private sector in development efforts, as well as a geopolitical response to China's BRI.<sup>192</sup> The overlap of these different purposes may be enticing, but it is not necessarily helpful. Achieving all of these objectives at the same time is unlikely, due to the many trade-offs involved. Achieving developmental impact, for instance, is likely to require a more limited focus on profitability, which would be less enticing for private sector actors.<sup>193</sup> Similarly, smaller-scale projects aimed

---

<sup>192</sup> Teevan, C., Bilal, S., Domingo, E., Medinilla, A. 2022. 'The Global Gateway: A Recipe for EU Geopolitical Relevance', Discussion Paper No. 323, Maastricht: European Centre for Development Policy Management; Bilal, S. 2022. 'The EU Global Gateway – One year in: How to partner with the private sector?', Maastricht: European Centre for Development Policy Management.

<sup>193</sup> For instance, toll roads have been shown to be more interesting for private sector actors, but to have a more limited developmental impact due to the fact that poorer segments of the population cannot afford to use them; Lanfranchi, G. 2021. *If you want to go far, go together' Community engagement and infrastructure development in fragile settings*, Policy Brief, The Hague: Clingendael.

at rehabilitating existing infrastructure have proven to have a high development impact,<sup>194</sup> but they are unlikely to be sufficiently visible to boost the EU's image vis-à-vis that of China. With these trade-offs in mind, EU policy makers should reflect on which elements to prioritise in order to leverage the bloc's investment under the Global Gateway in support of the EU's strategy.

#### **4. Deepen the understanding of the engagement of other foreign actors**

As seen earlier, the growing presence of other extra-regional actors has implications not only for the Horn itself, but also for the EU's engagement in the region. In order to adequately respond to this trend, EU policy makers should invest time and resources to develop a better understanding of the interests and strategies of these actors. While this brief presents a short overview of the regional engagement of some of these actors, more detailed information is needed on their engagement in specific countries, and on how this engagement impacts the EU. This information should then form the basis for developing a suitable policy.

Increased diplomatic exchanges with other foreign actors engaged in the region could also contribute to deepening the EU's understanding of their strategies. Kick-starting these conversations could be more easily done at the embassy level – particularly in Ethiopia, where the presence of multilateral organizations (African Union, United Nations Economic Commission for Africa) and international conferences offers more avenues for diplomatic exchanges (including informal ones, along the sidelines of certain events). These exchanges could serve as exploratory conversations which, if successful, could then be scaled up. With its focus on the broader region, the EUSR team could play a significant role in leading and coordinating these contacts – although the current crises in the region are likely to diminish the team's capacity to deal with longer-term strategic issues like this one.

#### **5. Strike a balance between cooperation, coexistence, and competition with other foreign actors**

A clear overview of the EU's own interests and tools, coupled with a deeper understanding of those of other foreign actors, can finally inform decisions on how the EU should relate with these other actors. These decisions should be based on region-specific considerations, and should not transfer patterns of alliances from other regions into the Horn. As noted in this brief, for instance, countries that are traditionally considered as partners for the EU (e.g. the Gulf countries) have been running against the bloc's interests in the Horn, while countries with which there is a more ambiguous relationship (e.g. China, Turkey) share more of the EU's interests in the region.

In order to make its engagement strategic in light of a growing foreign presence, this brief suggests that the EU should: cooperate with other foreign countries when this is useful (i.e. when complementarities can be leveraged for the benefit of both Horn countries and their foreign partners, the EU included); coexist with them when it is possible (i.e. when the actions of other foreign players do not damage the EU's interests); and compete with them when it is necessary (i.e. when those activities run against the EU's interests).

The analysis in this brief suggests that cooperation could materialize with countries such as China and Turkey in the domain of infrastructure development. As Ethiopia, formerly the most attractive country for infrastructure projects, remains mired in instability, this cooperation could be more likely to take place in more stable neighbouring countries, most notably Kenya. Opportunities for cooperation also exist in the humanitarian domain, particularly on widely shared concerns like food security. Somalia may be a theatre for such cooperation, which may involve increasingly active donors like Qatar and Turkey. While these countries tend to channel their assistance bilaterally, the EU could probe their willingness to join the EU in channelling a growing share of their aid through multilateral organizations, most notably the UN.

---

<sup>194</sup> Lanfranchi, G. 2021. *If you want to go far, go together: Community engagement and infrastructure development in fragile settings*, Policy Brief, The Hague: Clingendael.

On the other hand, on a number of occasions the engagement of other actors may either run against the EU's own efforts in the region (e.g. multiple foreign-backed diplomatic processes complicating the EU's own diplomatic efforts in Sudan),<sup>195</sup> or even directly harm its interests (e.g. smuggled Sudanese gold being used by Russia to insulate its economy from sanctions).<sup>196</sup> In these cases, the EU should take active measures to reduce the influence of other actors and to protect its own interests.

Overall, a careful balance between cooperation, competition and coexistence can allow the EU to maximize the benefits of its engagement, both for itself and for the region, without compromising the defence of its own interests.

---

195 Chughtai, A., Murphy, T. 2023. *Conflict and interests: Why Sudan's external mediation is a barrier to peace*, Commentary Berlin: European Council on Foreign Relations).

196 Collins, T. 2022. 'How Putin prepared for sanctions with tonnes of African gold', Telegraph, 3 March; <https://www.telegraph.co.uk/global-health/terror-and-security/putin-prepared-sanctions-tonnes-african-gold/> (accessed 10 October 2023); Sudan Tribune. 2022. 'Sudan denies reports about alleged role in Russian gold reserves', Sudan Tribune, 11 March <https://sudantribune.com/article256257/> (accessed 10 October 2023).

### About the Clingendael Institute

Clingendael – the Netherlands Institute of International Relations – is a leading think tank and academy on international affairs. Through our analyses, training and public debate we aim to inspire and equip governments, businesses, and civil society in order to contribute to a secure, sustainable and just world.

[www.clingendael.org/cru](http://www.clingendael.org/cru)  
[cru@clingendael.org](mailto:cru@clingendael.org)  
+31 70 324 53 84

 @clingendaelorg  
 The Clingendael Institute  
 The Clingendael Institute  
 clingendael\_institute  
 Clingendael Institute  
 Newsletter

### About the author

**Guido Lanfranchi** is a research fellow at Clingendael's Conflict Research Unit (CRU). He contributes to CRU's Horn of Africa programme, focusing on Sudan, Ethiopia and Somalia. Guido's research interests revolve around the interplay between economic, political and security dynamics, with a focus on how economic interests and business elites shape governance and conflict patterns. Guido also conducts research on geopolitical dynamics in the Horn of Africa, including the engagement of various foreign powers (Russia, China, Arab Gulf states, etc.).

**Acknowledgements:** This report would not have been possible without the financial support of the Dutch Ministry of Foreign Affairs, as well as the insightful comments from Jos Meester and Luuk van de Vondervoort.