



FINAL REPORT AND
RECOMMENDATIONS OF THE

**Senior Study
Group on
Peace and
Security in the
Red Sea Arena**



**UNITED STATES
INSTITUTE OF PEACE**
Making Peace Possible

About the Report

In recent years, the geopolitical and geo-economic dynamics of the Horn of Africa have become tied to the Middle East and broader Indian Ocean in a manner unprecedented in the last century. US strategy in this evolving environment has, however, struggled to keep pace with these interconnected, complex, and transregional dynamics and to account for the region's increased relevance to US interests.

Between May 2019 and September 2020, the United States Institute of Peace convened a bipartisan senior study group to consider the factors that have reshaped the region, referred to here as the Red Sea arena; to define US interests within a hierarchy of priorities to assist policymakers in calibrating diplomatic, development, humanitarian, and security interventions; and to provide recommendations for defending and advancing these interests. The most critical challenges in the region will require multilateral responses bolstered by the appropriate, region-led multilateral architecture, but only US leadership can ensure that effective solutions are brought to bear in responding to shared political, economic, and security threats.

The Final Report and Recommendations of the Senior Study Group on Peace and Security in the Red Sea Arena considers the region as a shared political, economic, and security ecosystem comprised of the eight states of the Horn of Africa (Djibouti, Ethiopia, Eritrea, Kenya, Somalia, South Sudan, Sudan, and Uganda) and the states of the Middle East whose intensifying engagement is one of the most significant developments affecting the region (Egypt, Israel, the Gulf states, and Turkey). The term “arena” is used to connote both the transregional nature of this geopolitical ecosystem and the heightened militarization and competition among state actors that increasingly defines it.

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The views expressed in this report are those of the members of the Senior Study Group alone. They do not necessarily reflect the views of the United States Institute of Peace. An online edition of this and related reports can be found on our website (www.usip.org), together with additional information on the subject.

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The members of the study have participated in their personal capacities; the views expressed are their own and do not necessarily represent the views of their institutions or employers.

Executive Summary

In the last five years, the geopolitical landscape of the Red Sea arena has been fundamentally reshaped.¹ The Horn of Africa is now an integral part of and in fact the link among the security systems of the Middle East, the Indo-Pacific, and the Mediterranean by virtue of the strategic importance of and competition for influence over the Red Sea and the states that border and depend upon it for trade and transit. Middle Eastern states are asserting themselves in the Horn of Africa in ways unprecedented in at least a century, and the Red Sea arena is becoming increasingly militarized. As in the eastern Mediterranean, the export of Middle Eastern rivalries into the Horn of Africa—with the United Arab Emirates (UAE), Saudi Arabia, and Egypt contesting Turkey and Qatar for dominance—is fueling instability and insecurity in an already fragile, volatile, and conflict-prone region.

In addition, both Ethiopia and Sudan are navigating the most significant political transitions since the end of the Cold War in which the fundamental assumptions underlying each state's political structure and governance model are being reexamined and challenged. The transitions in Ethiopia and Sudan present an opportunity to set the region on a transformative new trajectory toward reform and stability, yet they also carry a risk of state failure that, given these states' combined population of more than 150 million, would send a tidal wave of instability across Africa and the Middle East.

The protest movements that catalyzed the transitions in Ethiopia and Sudan illustrate a demographic explosion in which an entire generation is coming of political age and questioning the credibility, legitimacy, and efficacy of their governments in meeting their aspirations for basic security and economic prosperity. This is set against the population estimates that project the Horn of Africa will grow by 44 percent in the next fifteen years and by 87 percent in the next thirty. And though the full extent of the health impact of the COVID-19 pandemic is as yet unclear, the Horn of Africa's extant vulnerabilities suggest that the pandemic could result in lasting damage.

Although US military commitments, security investments, and humanitarian and development assistance remain significant, the United States has been withdrawing from its role as the dominant external political power in the Red Sea arena. In this environment, the United States needs a new strategic framework to successfully advance and defend its interests. This study recommends four pillars that should comprise such a framework.

Four Pillars of a US Strategic Framework for the Red Sea Arena



A political and diplomatic strategy to inoculate the Horn of Africa against the fallout of Middle Eastern rivalries

Undertake a sustained diplomatic campaign to broker a détente in the Horn of Africa between the rival Middle Eastern blocs, remove that region as a battleground for their competition, and preserve the sovereignty of the Horn's states

Catalyze a new regional architecture that minimizes contestation and maximizes cooperation



Structural reforms to overcome the bureaucratic seams within the US government

Designate a special envoy with responsibility for the Red Sea arena

OR

Designate the deputy secretary of state as the interagency lead for developing and executing an integrated strategy on the Red Sea arena

IN EITHER CASE

Establish an interagency policy committee (IPC) on the Red Sea arena, co-chaired by the National Security Council senior directors for Africa and the Middle East



Realignment of US assistance to promote inclusive, legitimate governance and economic growth

Designate the Horn of Africa as a priority region under the Global Fragility Act (2019)

Require a five-year Integrated Regional Strategy for the Red Sea arena encompassing the State Department, Defense Department, and USAID

Designate the USAID administrator as the president's special assistance coordinator for the Red Sea and establish a USAID Red Sea task force

Reinvigorate the ministerial-level "Tidewater Group" plus the UN, the AU, IGAD, the IFIs, and the Gulf states with a specific focus on the Red Sea

Establish a G20 working group on debt relief for the Horn of Africa to catalyze a dialogue among Paris Club and non-Paris Club creditors

Designate the Horn of Africa as a priority region by the Development Finance Corporation

Explore qualified industrial zones as mechanisms for promoting regional cooperation among Red Sea states



Active congressional engagement

Strengthen coordination among the relevant congressional bodies on both a transregional (i.e., Africa and Middle East) and interdisciplinary (i.e., foreign affairs, armed services, appropriations) basis

Establish reporting requirements on the destabilizing actions by Middle Eastern states in the Horn of Africa

Encourage bipartisan congressional champions to provide particular support to the transitions in Ethiopia and Sudan

Findings

The study group identified six defining trends in the Red Sea arena, recognition of which should be the basis for a new US strategic policy framework.

Regional order. The Horn of Africa is now an integral part of and in fact the link among the security systems of the Middle East, the Indo-Pacific, and the Mediterranean by virtue of the strategic importance of and competition for influence over the Red Sea and the states that border and depend on it for trade and transit. As a result, developments in the Horn not only are shaped by these regions but also have a direct impact on their political, economic, and security environments.

Middle Eastern rivalries. Middle Eastern governments are asserting themselves in the Horn of Africa, and the Red Sea arena is becoming increasingly militarized. In the last five years, nearly a dozen new military bases have been established on the eastern and western coasts of the Red Sea, ranging from Ras Banas, Egypt, in the north to Mogadishu, Somalia, in the south. Egypt, Saudi Arabia, the UAE, Turkey, and Qatar are moving to create spheres of influence in the Horn that share an illiberal view of politics but otherwise diverge in terms of motivations and aims.

As in the eastern Mediterranean, the export of Middle Eastern rivalries into the Horn—the UAE, Saudi Arabia, and Egypt contesting Turkey and Qatar for dominance—is fueling instability and insecurity in an already fragile, volatile, and conflict-prone region, not least through the use of proxies. For instance, Sudan’s Rapid Support Forces have been deployed to Yemen and to Libya at various points to augment Saudi and Emirati-backed forces. Yet no regional hegemon is likely to emerge, and neither camp is capable of prevailing decisively over the other in political, economic, or military terms. In Somalia, for example, Gulf rivalries have undermined progress toward state cohesion and the federal project.

Historic political transitions. Both Ethiopia and Sudan are navigating the most significant political transitions since the end of the Cold War, in which the fundamental assumptions underlying each state’s political structure and governance model are being reexamined and challenged. These present both an opportunity to set the region on a transformative new trajectory toward reform and stability and a risk of state failure that would send a tidal wave of instability across Africa and the Middle East. In 2018 and 2019, nearly three hundred thousand people fled the Horn of Africa for war-torn Yemen en route to the Gulf. State breakdown in either Ethiopia or Sudan would result in a refugee exodus that could easily dwarf that figure.

MAP 1

Red Sea Arena



Note: Adapted from artwork by Porcupen/Shutterstock. The boundaries shown on this map are approximate and do not imply official endorsement or acceptance on the part of the members of the Senior Study Group or the United States Institute of Peace.



Demonstrators arrive at the site of a sit-in outside the military headquarters in Khartoum, Sudan, on Thursday, April 25, 2019. (Photo by Bryan Denton/New York Times)

Demographics. The population of the Horn of Africa is projected to grow by 44 percent in the next fifteen years and by 87 percent in the next thirty. The protest movements that catalyzed ongoing political transitions in Ethiopia and Sudan illustrate a demographic explosion in which an entire generation is coming of political age; is frustrated with the kleptocracy and criminality of many of the region's leaders; is resentful of political and economic exclusion as well as the lack of equal opportunity and protection under the law; and is questioning the credibility, legitimacy, and efficacy of their governments in meeting their aspirations for basic security and economic prosperity. The members of this generation do not derive their identity primarily from their citizenship, and their definition of their interests is increasingly at odds with how their countries' elites have defined them.

Egypt's population is expected to increase by nearly 60 percent to 158 million in 2050. Egypt is also a youthful society in that 34 percent of the population is under the age of fifteen, and a small majority (57 percent) lives in rural areas. By contrast, the Arab Gulf states, where only 22 percent of the region is under the age of fifteen, have much older populations. The region's

population, which is presently 87 percent urban, is expected to increase by one-third to seventy-six million by 2050.² Concerns about corruption and aspirations for economic opportunity are as widespread in Egypt and the Gulf as they are in the Horn, particularly among youth.

Lack of a US political strategy. Although US military commitments and security investments remain significant in the region, the United States has been withdrawing from its role as the dominant external political power in the Red Sea arena, a development that preceded the Trump administration but has accelerated under it. Initial acquiescence to—if not tacit support for—the Saudi-led coalition’s war in Yemen followed by erratic diplomatic support and frequent disinterest in supporting a genuine political settlement is indicative of this trend. Similarly, the US failure to mobilize a diplomatic center of gravity to ensure the success of the transition in Ethiopia is notable in contrast to prior efforts in the region, for example, the investment of significant diplomatic capital made by the George W. Bush administration to broker an end to Sudan’s civil war. The Trump administration’s attempt to mediate between Egypt and Ethiopia on the use of the Nile’s waters and the filling of the Grand Ethiopian Renaissance Dam (GERD) has heightened rather than lessened tensions, exacerbated rivalries in Khartoum between camps that are variously sympathetic to the Egyptian or Ethiopian positions, and been disconnected from other US efforts to stabilize and support the Sudanese and Ethiopian transitions. Similarly, US pressure to normalize Sudanese-Israeli relations hastily without considering the implications for the Sudanese transition could undermine that transition’s promise.

The Red Sea arena remains rife with intrastate and proxy conflict, yet this US withdrawal has not been replaced with a new political and security architecture or strategy. Although the sea lanes in the Red Sea have remained largely safe to date because states have a shared interest in keeping them open, the ad hoc response to maritime security has delayed the development of an agreed framework for addressing emerging security trends posed by both state and nonstate actors. In addition, confidence is waning among the region’s states as well as among external actors such as China that the United States is interested in protecting freedom of navigation and key infrastructure or able to do so.

COVID-19 pandemic. Although the full extent of the health impact of the pandemic is as yet unclear, the Horn of Africa’s extant vulnerabilities—conflict, a displaced population comprising 20 percent of the global total, widespread food insecurity, weak health systems and poor sanitation, and economic crises—suggest that the pandemic could result in lasting damage. Economic isolation exacerbates economic crisis, which is one of the main drivers of regional instability. The closure of borders impedes the delivery of necessary humanitarian assistance, deepening the existing humanitarian crises. Sealing off refugee camps will only transform them into incubators of infection and permanent “hot spots” from which COVID-19 could metastasize.

The United States has five strategic interests at stake in the region.

Peace and security. The implications for international peace and security in the Red Sea arena can best be thought of as a Venn diagram in which regional risks and opportunities intersect with country-specific risks and opportunities at identifiable points. The political transitions ongoing in Ethiopia and Sudan stand out as representative of the nexus. The success or failure of these transitions will hinge not only on domestic political developments in each country but also on other factors such as the extent, for example, that Middle Eastern rivalries disrupt the necessary internal consensus building or that competition over the use of the Nile's waters motivates external actors to support factionalism.

The United States remains the sole external actor capable of tempering these influences to prevent outcomes inimical to US interests. The failure of the transitions in Ethiopia and Sudan would, for example, exacerbate and expand the fallout of the stressors already facing the state systems across the Middle East and North Africa—from Libya to the Levant to Yemen. US adversaries, such as Iran and Russia, are poised to exploit these strains, as they have done elsewhere.

Given their populations of approximately 45 million and 105 million, Sudan and Ethiopia are respectively more than two times and six times the size of prewar Syria. Fragmentation of either country would be the largest state collapse in modern history, likely leading to mass interethnic and interreligious conflict; a dangerous vulnerability to exploitation by extremists; an acceleration of illicit trafficking, including of arms; and a humanitarian and security crisis at the crossroads of Africa and the Middle East on a scale that would overshadow the existing conflicts in South Sudan, Sudan, Somalia, and Yemen. International mechanisms are ill suited to address these scenarios. In 2018 and 2019 alone, just under three hundred thousand people fled the Horn of Africa for war-torn Yemen en route to the Gulf.³ State breakdown would result in a refugee exodus in all directions that could easily dwarf that figure, destabilizing not just African neighbors, such as Kenya and Egypt, but Israel, Jordan, and the Gulf states as well.

By contrast, the success of these transitions would benefit the United States. A democratic Sudan committed to the rule of law could play a vital bridging role between Africa and the Middle East; serve as an example of legitimate governance; set new terms for regional cooperation; and, with a more prosperous economy, contribute to boosting regional economic growth. Similarly, a stable, inclusive, democratic Ethiopia would be a much stronger, more reliable champion for Africa as the continent increasingly asserts its own agency and would exemplify the type of multicultural democracy to which the region's people aspire, limiting the opportunities for malign actors.

Good governance. The Ethiopian and Sudanese transitions are the most prominent—though not only—examples of how the unfolding global contest between authoritarianism and



A cargo ship docked at the port in Hodeida, Yemen, on September 29, 2018. (Photo by Hani Mohammed/AP)

liberalism is manifest in the Red Sea region. They are bellwethers for the US commitment to promoting transparent, democratic governance. Faced with the demographic trends outlined, the securitization of politics is not a tenable long-term strategy for stability. The United States therefore has both a comparative advantage, based on its values, and a strategic rationale for promoting inclusive, accountable political systems. To the extent that competition exists between the United States and China in the Red Sea arena, it is over values and economic resources rather than security issues.

Economics. The Red Sea is one of the most vital trade arteries in the world: approximately \$700 billion worth of goods flow through it each year, including most of the maritime trade between Europe and Asia.⁴ It is a core node in the global energy market and inextricably linked—both in political terms and with respect to its significance as a transit route—to the competition over hydrocarbon resource extraction in the eastern Mediterranean and in the African interior. This competition encompasses both US-China competition, whereby the United States should seek to preempt a Chinese monopoly on the extractive resource sector, and competition among regional actors such as Egypt, Israel, the UAE, and Turkey. The

strategic value of its location—and the leverage and influence that accrues to any external actors able to dominate or control the Red Sea—will only become more acute over time in light of broader geo-economic developments and the fact that commercial (as well as political and security) influence is being contested within the regions that the Red Sea connects—namely, the Indian Ocean and the Mediterranean.

Maritime security. Given key choke points at either end—the Suez Canal (under the sovereignty of Egypt) to the north and the Bab-al-Mandeb strait (an international waterway connecting the Red Sea to the Gulf of Aden) to the south—the Red Sea could be closed by a large and well-executed attack, which would have severe consequences for international trade as well as for the transit of US naval vessels between the Mediterranean and the Indian Ocean. The destruction of piers, ports, platforms, and other infrastructure vital to global commerce could also precipitate significant political, security, and economic challenges, particularly in light of the proliferation of coastal infrastructure on the western side of the Red Sea in the last five years and the competition among Middle Eastern states for control of that infrastructure. The Red Sea and the Gulf of Aden are also seeing a number of emerging threats beyond long-standing concerns of piracy, including increasingly sophisticated methods of trafficking in humans and weapons; floating armories that are vulnerable to seizure by criminal or extremist groups; “bomb boats”; and cyber threats such as those to shipping lines, remote seizure of navigation systems, hacked controls of oil pipelines, and severed undersea cables that would affect up to half of the world’s internet access.

Global order. Although the governing systems of Arab states of the Red Sea region seem relatively static for the foreseeable future, the degree to which the Horn of Africa tilts away from authoritarianism and toward reform and good governance is dynamic and will be critical to the balance between liberalism and illiberalism globally. This balance will have important implications for issues ranging from human rights to cybersecurity. These states also represent important voting blocs within the United Nations, and commitment to multilateralism is deep among the region’s states in order to increase their collective influence vis-à-vis external powers, among other reasons. This region therefore represents an important opportunity for the United States to reinvigorate multilateral engagement to address challenges that are fundamentally multilateral rather than bilateral.

The United States needs a new strategic framework to successfully advance and defend its values and interests in the Red Sea arena, guided by specific principles.

US interests will be undercut in both the Horn of Africa and in the Middle East if Washington fails to consider the Red Sea as an interconnected region and if US policies toward the Horn and the Middle East continue to be developed and executed in isolation from one another. A strategic framework should consider a ten- to twenty-year time frame, consistent with the Global

US policy should recognize that the external actors responsible for instability in the Red Sea region are not primarily US rivals—that is, China and Russia—but US partners, namely, Qatar, Saudi Arabia, Turkey, and the UAE.

Fragility Act of 2019. To that end, a strategy based solely on playing defense—that is, one predicated on counterterrorism and providing security and economic support to regimes that avoid close collaboration with China or Russia—or acting through proxies will not be enough to advance US interests in the context of the trends described.

US policy should recognize that the external actors responsible for instability in the Red Sea region are not primarily US rivals—that is, China and Russia—but US partners, namely, Qatar, Saudi Arabia, Turkey, and the UAE. Although Iran’s role in Yemen is of course

also destabilizing, its influence has not yet reemerged in the Horn to any significant degree. However, Iran, like Russia, could move to exploit instability in the Horn caused by the rivalries of these other states. The United States should consult closely with its European allies as well as important Asian maritime countries, including India, Japan, and South Korea.

The United States needs to marshal all elements of its national power, its unique ability to convene transregional actors as well as international institutions, and its comparative advantages to achieve these goals relative to other extra-regional powers such as China, including development and humanitarian assistance and its influence in regard to international financial institutions. Even though the Red Sea states typically have weak institutions and thus policies often determined by a narrow group of individuals, US strategy should not be overly personalized in support of or in opposition to specific leaders whose endurance may be questionable.

Recognizing African agency in this new geopolitical environment is also essential, as is identifying opportunities for US partnership to reinforce that agency in order to mitigate the destabilizing power imbalance between the states of the Horn and those of the Middle East. The United States should delineate where its interests converge and diverge with those of other extra-regional powers, notably China, in this unique and dynamic geographic zone and then tailor specific responses on that basis rather than viewing Chinese aims in the Red Sea as identical (or even complementary) to those of Russia or through the prism of Chinese policy in, for example, Asia.

Recommendations

To defend and advance the US interests outlined within a new strategic framework that accounts for and responds to the changed geopolitical landscape of the Red Sea arena, the United States should undertake the following steps and reforms.

Develop a political and diplomatic strategy to inoculate the Horn of Africa against the fallout of Middle Eastern rivalries.

The most destabilizing trend in the Red Sea region is the zero-sum competition for influence among Middle Eastern actors and the risks that competition poses to state integrity in the Horn of Africa. The Libyan civil war and confrontation in the eastern Mediterranean should serve as cautionary tales. The fallout of a similar internationalization of conflict in the Horn of Africa would be catastrophic for peace and security and leave the region vulnerable to exploitation by states, such as Iran and Russia, who can benefit from the instability. Qatar, Saudi Arabia, Turkey, and the UAE could, if they choose, be partners in ensuring that the transitions in Ethiopia and Sudan succeed on the basis of meaningful reforms as well as in addressing emerging threats to maritime security.

The United States should therefore undertake a sustained diplomatic campaign to broker a détente in the Horn of Africa between the rival Middle Eastern blocs, remove that region as a battleground for their competition, and preserve the sovereignty of the Horn's states. The United States should enable and provide cover to the states of the Horn to remain neutral amid the rising competition for influence, in part by itself remaining a neutral, stabilizing actor in issues such as the conflict around the use of the Nile's waters. As noted, all of these rivals are US allies and partners, and the United States maintains influence over them, which it can exercise if it chooses. The United States must be prepared, for example, to exact specific consequences—such as the threat of sanctions or reconsideration of weapons sales—when Middle Eastern interventions in the Horn undermine its states' attempts at neutrality and reform or exacerbate political fault lines. This—which would require elevating the Horn as a priority in US bilateral relationships with governments throughout the Middle East, including Israel—could help deter Middle Eastern states from further polarizing the Horn's already charged political landscape.

Washington should catalyze a new regional architecture that minimizes rivalry and maximizes cooperation. The United States remains the sole international actor capable of convening across the political fault lines within the Red Sea arena. It can and should take a more active role in exploring new mechanisms and forums for addressing challenges of shared



Foreign ministers meet to form the Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden in Riyadh, Saudi Arabia, on January 6, 2020. (Photo by Ahmed Yosr/Reuters)

concern. Working closely with the European Union and its member states can be a force multiplier for these efforts given their deep political and military engagements in the region. No ministerial-level contact group has met, nor has a multilateral meeting been held, since the onset of the transitions in Ethiopia and Sudan. If it plays a pragmatic and neutral role, the United States can support resolution of the dispute over the use of the Nile’s waters between Egypt and Ethiopia and build on that to forge a collective international effort to improve water security in northeast Africa to harness positively the interests and investments of Gulf states in the Horn in concert with European partners and the international financial institutions.

The United States can also be instrumental in bridging across multilateral institutions and initiatives to minimize competition and promote mutually reinforcing efforts. The various multilateral initiatives currently underway include the Intergovernmental Authority on Development (IGAD) Task Force on the Red Sea, the African Union (AU) High Level Implementation Panel consultations, and the Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden. These forums provide ample opportunity for discussions of new structures that effectively

The regional divides within the US government's foreign policy bureaucracy that differentiate Africa from the Middle East are anachronistic given the evolved geopolitical landscape in the Red Sea arena.

promote regional peace and security. The United States should play a vital role in catalyzing these efforts toward concrete action.

Maritime security is also ripe for cooperation given that it is one of—if not the—most unifying priorities among regional states. The strongest models for international cooperation in the Red Sea arena have been counterpiracy efforts dating to the 2008 adoption of UN Security Council Resolution 1851, including Operation Atalanta, undertaken by the EU Naval Force (EU NAVFOR), and the multinational Combined Task Forces 150 and 151. The new array of emerging

maritime threats, however, demands that the international architecture for confronting them be updated. Such an update should include a focus on coastal law enforcement, not just military interventions. The US military's Africa Command (AFRICOM) and Central Command (CENTCOM) can also play an important role in multilateral, military-to-military engagements that reinforce diplomatic efforts to foster cooperation on shared maritime challenges.

Institute structural reforms to overcome the bureaucratic seams within the US government.

The regional divides within the US government's foreign policy bureaucracy that differentiate Africa from the Middle East are anachronistic given the evolved geopolitical landscape in the Red Sea arena. They therefore impede the development and execution of a strategy for effectively advancing US interests. Several options for addressing this deficiency are possible.

One option would be to designate a special envoy with responsibility for the Red Sea arena. The advantage is that a senior official would be charged with addressing the region's complexity in an integrated way—spanning regional bureaus and leadership—and that the appointment itself would suggest a heightened prioritization of the issue. The disadvantage is that the addition of another bureaucratic node could lead to internal turf battles.

A previous study on the use of special envoys concluded that they are most effective when (1) an issue reaches a high level of interest and concern, has strong regional as well as bilateral aspects, and exceeds the capacity of the normal State Department system; (2) the mandate is clear and limited; and (3) the envoy is empowered and recognized as such by the president and secretary of state, which includes direct access to both.⁵ Given the US bilateral relationships at stake in the region, these conditions both obtain and would be necessary for a Red Sea envoy to be successful.

Another option would be to designate the deputy secretary of state as the interagency lead for developing and executing an integrated strategy on the Red Sea arena. The primary advantage of this approach is that the deputy secretary, along with the undersecretary

of state for political affairs, has supervision of both the African and Near Eastern bureaus at the State Department and could therefore ensure more effective integration and prioritization of policy objectives and interventions across regions. In addition, that individual is well positioned to manage coordination of US assistance in the Red Sea arena with the US Agency for International Development (USAID), the Department of Defense, and the Department of the Treasury to ensure alignment. As the second-highest ranking official in the State Department, the deputy secretary faces significant draws on their time, but the deputy secretary playing a robust role in the Horn of Africa has precedent. As deputy secretary of state during the presidency of George W. Bush, Robert Zoellick was the administration's point person on Sudan while also leading US diplomatic efforts on China and India.

Under either option, the executive branch should establish a standing interagency policy committee (IPC) on the Red Sea arena. Addressing acute transnational or transregional challenges, such as drugs, refugees, and global health crises, has benefited from the establishment of a senior-level coordination mechanism based at the White House to develop and oversee policy execution across US government agencies. The establishment of an IPC co-chaired by the National Security Council's senior directors for Africa and the Middle East would ensure policy alignment and the coordinated execution of a strategy on the Red Sea across foreign affairs institutions and agencies, including the State Department, the Defense Department, USAID, and the Treasury Department as well as with the Office of Management and Budget. This would complement and reinforce the diplomatic engagement undertaken by a special envoy or the deputy secretary of state. To maximize effectiveness of the IPC process, the national security advisor and deputy national security advisor would need to establish the Red Sea arena as a priority.

Realign US assistance to promote inclusive, legitimate governance in the Horn of Africa as well as economic growth in the region.

Power in the Horn of Africa is now too diffuse and contested for long-term stability to be established by authoritarianism or force, despite the myriad attempts to do just that. The transitions in Ethiopia and Sudan in particular present a once-in-a-generation opportunity to transform the region. In addition, the COVID-19 pandemic demands that governments pursue more consensus-driven politics. The United States and its European partners can play an instrumental role in asserting the importance of this and providing incentives to do so.

A commitment to humanitarian and development assistance is one of Washington's strongest assets in trying to exert principled influence relative to other extra-regional actors such as China. US diplomacy and foreign assistance throughout the region should be anchored in the emerging consensus on the importance of promoting inclusive, legitimate governance as the key to mitigating violence, fragility, and extremism as outlined in the Global Fragility Act and in the fragility strategies

Effective multilateral coordination with the EU, its member states, and Japan would enable the United States to jointly leverage its investments and assistance resources to maximize impact.

adopted by, among others, the United States, the United Kingdom, the World Bank, and the International Monetary Fund. These approaches aim at reducing inequality, exclusion, and injustice while reforming institutions and addressing structural factors that fuel grievances.

US objectives in the Red Sea arena are broadly aligned with those of its European partners and Japan. Effective multilateral coordination with the EU, its member states, and Japan would enable the United States to jointly leverage its investments and assistance resources to

maximize impact. For example, combined US, EU, and British foreign direct investment (FDI) in Ethiopia, Sudan, and Djibouti since 2003 is estimated at \$10 billion, compared with \$6.5 billion from China.⁶ The EU, meanwhile, is the largest humanitarian and development donor in the region, followed by the United States.

To these ends, the United States should ensure that US development and humanitarian assistance in the Red Sea region is commensurate with and adaptable to the scope and scale of the regional and bilateral challenges to US interests. **The United States should designate the Horn of Africa as a priority region under the Global Fragility Act**, unlocking access to the Prevention and Stabilization Fund, the Complex Crisis Fund, and the Multi-Donor Global Fragility Fund. The administration should also require that annual State Department Integrated Country Strategies; USAID Country Development Cooperation Strategies; and Department of Defense campaign plans, operational plans, and regional strategies explicitly support **a five-year integrated regional strategy for the Red Sea** to be developed jointly by the special envoy (or equivalent) and the USAID administrator, who should be designated **the president's special assistance coordinator for the Red Sea**. Relatedly, the United States should establish **a USAID Red Sea task force**, led by a director reporting directly to the administrator, to serve as the secretariat for coordinating the development of USAID's regional and country assistance strategies to support the integrated regional strategy across all categories of USAID's assistance accounts and operating units.

Further, the United States should convene a chiefs of mission and USAID mission directors Red Sea regional conference on an annual basis to review and update the integrated regional strategy, including senior participation of the Defense Department officials charged with security cooperation and operations in Africa and the Middle East as well as senior State Department officials (deputy secretary or special envoy as well as regional assistant secretaries for Africa and the Middle East). The integrated regional strategy should be informed by expert political economy analyses, updated annually, to pay special attention to the underlying sources of exclusion and grievance within countries in the Red Sea region and the interconnectedness of geopolitical efforts of external actors to exploit grievances or negate the foundations of accountable state-society relations. The integrated regional strategy should

also require that humanitarian, development, governance, or security-sector assistance—bilateral and regional—be provided only if it can, using an evidenced-based theory of change, demonstrate that it will deliver essential services to citizens; advance meaningful (liberal and inclusive) political reform; and advance state- and society-based reforms needed to foster the legitimacy, accountability, and transparency of state and regional institutions critical to mitigate and prevent violent contestation.

Washington should also ensure that US security assistance and security cooperation reinforce inclusive, legitimate governance. Train-and-equip programs centered exclusively on counterterrorism have often distorted governance in the states of the Horn, skewing it toward securitized responses to domestic opposition and away from efforts to foster inclusion and legitimacy, ultimately undermining efforts to mitigate or prevent violence or promote stabilization. Relatedly, during the Cold War, US security assistance privileged international alignment over citizen security, which exacerbated poor governance and impeded state effectiveness.⁷ To avoid these outcomes, the United States should subordinate bilateral security assistance and cooperation activities to the integrated regional strategy and integrated country strategies (as discussed), including clandestine support to elite special operations forces and other counterterrorism cooperation.⁸

Moreover, US policymakers and leaders should predicate security cooperation and assistance strategies in the Red Sea region on adherence to empirically grounded principles and programmatic approaches that prioritize

- ensuring sustainability and consistency of presence and engagement with national and regional actors;
- advancing civilian oversight and democratic accountability of security actors and institutions;
- enabling inclusive, nationally owned visions and processes of security sector reform;
- empowering and incentivizing reformers within security institutions; and
- identifying and mitigating long-term risks of US (and other external) security cooperation and assistance activities impeding progress toward democratic, civilian-led security institutions.

The convening capacity of the United States is unrivaled. **Washington should reinvigorate the ministerial-level Tidewater Group** of Western nations plus Japan and South Korea jointly with the United Nations, the AU, IGAD, the international financial institutions, and the Gulf states with a specific focus on the Red Sea to provide a mechanism for developing a set of common principles and priorities as well as accountability. The Tidewater Group could provide focus for developing a strategic, long-term economic growth plan for the Red Sea region, in particular the Horn of Africa, that includes incentives for regional integration and support for the political transitions in Ethiopia and Sudan.

Despite the tensions in the US-China bilateral relationship, it is in the interests of both countries to stabilize the region, and an opportunity exists to cooperate on debt relief despite the difficulty.

The United States should also establish a G20 working group on debt relief for the Horn of Africa to catalyze a dialogue among Paris Club and non-Paris Club creditors.⁹ The Horn is one of the most heavily indebted regions of the world. That indebtedness has a deleterious impact on stability in the region because it hinders the prospects for governance reform, undermines economic growth, and impedes efforts to address the COVID-19 pandemic and other health crises as well as food insecurity and other challenges. The G20 Debt Service Suspension Initiative cast too wide a net, included a number of countries that did not need or request debt relief, and has largely

stalled. The G7 debt moratorium, extended in September 2020, is not likely to meaningfully alleviate the debt crisis in the Horn.¹⁰ There is, however, a unique rationale for building a coalition of creditors for the Horn to catalyze a pragmatic solution to its debt crisis without undercutting the Paris Club. Despite the tensions in the US-China bilateral relationship, it is in the interests of both countries to stabilize the region, and an opportunity exists to cooperate on debt relief despite the difficulty. With deft diplomacy, the United States and China could partner with the G20 troika of Saudi Arabia, Italy, and India to anchor the effort. Saudi Arabia can provide important leadership given the substantial debt that Gulf Cooperation Council (GCC) states hold. Given India's growing economic investments in the Horn, New Delhi also has an interest in seeing both stability and economic growth.

Washington should also leverage the newly established Development Finance Corporation (DFC) to encourage private-sector growth in the Horn and build on the DFC's current focus on Ethiopia and Kenya. The DFC should designate the Horn of Africa as a priority region and deploy Africa investment advisors to the Horn states. It should also exercise its statutory flexibility under the BUILD Act (2018) to support like-minded commercial interests seeking to engage in the region. Like US companies, Western and allied companies usually bring more transparent business practices. Relevant US agencies should work with the Sudanese government to raise its labor standards to enable DFC-backed projects in Sudan, which are currently precluded in the face of weak labor standards. The DFC should expand backing for local financial institutions in the Horn to improve liquidity in the face of the economic contraction caused by the COVID-19 pandemic.

Last, the United States needs to explore the potential for qualified industrial zones, such as those between Israel and Jordan and Israel and Egypt, as mechanisms for promoting regional cooperation among Red Sea states.

Activate Congressional Oversight and Political Engagement on the Red Sea Arena

Congress can be instrumental in ensuring that the United States has an effective, integrated policy in the Red Sea region that accounts for the new geopolitical picture and adequately defends and advances US interests. **The executive branch's execution of a new Red Sea strategy would be significantly reinforced through strengthened coordination among the relevant congressional bodies** on both a transregional (i.e., Africa and Middle East) and interdisciplinary (i.e., foreign affairs, armed services, appropriations) basis. This could include mechanisms **for regular reporting requirements on the destabilizing actions by Middle Eastern states in the Horn of Africa.** Congress could also reinforce any new US executive architecture by empowering and receiving regular reports on the Red Sea arena from a special envoy or the deputy secretary of state.

In addition, a bipartisan group of members of Congress could provide particular focus to the transitions in Ethiopia and Sudan, which exemplify the broader Red Sea dynamics and present, as elaborated in this report, both the greatest opportunities and greatest threats to US interests. Congressional champions could not only be vital in sustaining US foreign assistance in this region but also provide equally important political engagement through regular visits and contact with key stakeholders on both sides of the Red Sea.

Regional Trends and Actors

Of the many trends and actors affecting the Red Sea region, the most significant are the economic, political, and geostrategic rivalries and competing interests among powerful Middle Eastern states; the historic transitions underway in Sudan and Ethiopia; the changing demographics and disparate political priorities of the region's citizens; the maritime threats affecting trade and access to information; and the short- and long-term economic ramifications of the COVID-19 pandemic.

Middle Eastern Interests and Rivalries

Saudi Arabia, Turkey, the UAE, and Qatar have increased their engagement in the Horn of Africa significantly in recent years for a host of economic, political, and geostrategic reasons. These interests are overlapping and compounding. For example, Gulf states frequently employ economic tools of statecraft, including private-sector investment in the Horn of Africa, to advance their political aims.

GULF STATES

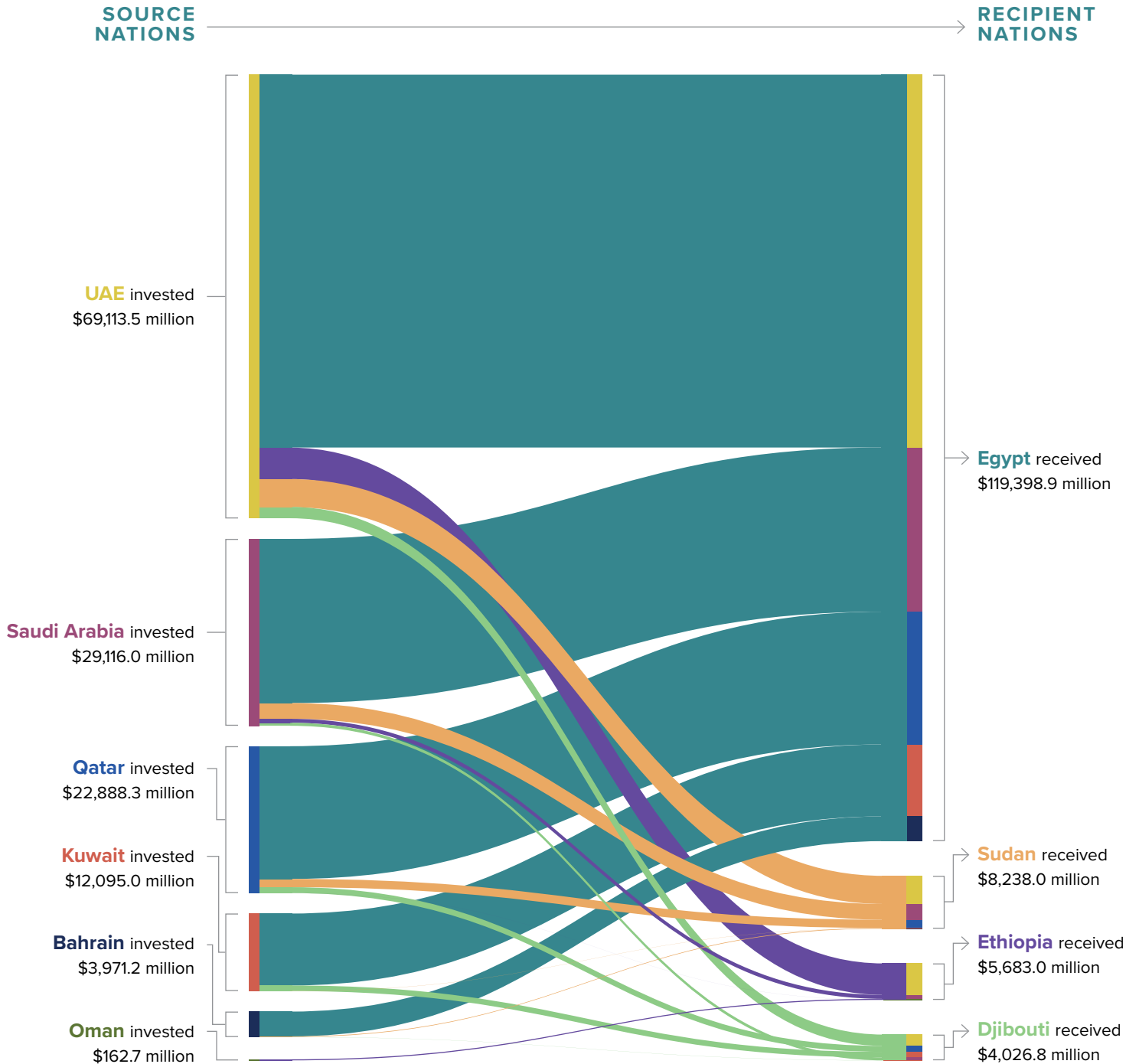
The Arab Gulf states are pursuing ambitious plans to diversify their economies and see the Horn of Africa as an ideal region for future investment. The GCC states have invested in more than 430 projects in the Horn of Africa since 2000. Their total aid to and direct investment in Ethiopia, Sudan, and Djibouti has amounted to just under \$18 billion since 2003. As a point of comparison, the GCC countries have been the most consistent investors in Egypt, providing the country with nearly \$120 billion in combined aid and direct investment since 2003 (see figure 1). Ethiopia saw a notable increase in GCC investment and aid in 2018 and 2019, primarily from the UAE (China remains the most consistent investor in the country, however, with investments and construction totaling \$24.5 billion since 2005).¹¹

Gulf investments in the Horn have largely focused on the agriculture, manufacturing, and construction sectors. Saudi Arabia and the UAE have proven particularly eager investors. Both countries are attempting to transform and expand their national oil companies to take larger roles in oil refinement, shipping, and plastics manufacturing. Creating overseas demand for such value chains is integral to these types of diversification strategies.

FIGURE 1

Gulf Cooperation Council Investments across the Red Sea, 2003–20

The six GCC nations have provided \$137.3 billion in investment funds to four of the nations on the African side of the Red Sea. Nearly 87 percent of that has flowed to Egypt.



Data source: Karen Young, "Gulf Financial Aid and Direct Investment Tracker," American Enterprise Institute.

These economic diversification efforts have also entailed a shift in immigration policies within the Gulf states. Although Gulf states have traditionally tolerated or encouraged low-skilled migration, including from the Horn of Africa, they are beginning to recalibrate immigration policies to increase employment of nationals and prioritize high-skilled immigrants who can help develop industries such as information technology or health care. As discussed later in this report, Saudi Arabia has deported thousands of undocumented immigrants over the past two years, including many Ethiopians, in an effort to reduce unemployment among Saudi nationals, which stood at 12 percent in the last quarter of 2019.¹² (These forced repatriations have placed an additional burden on Ethiopia's economy.) Gulf states' economic diversification efforts appear to have broad support from their citizenry, with a majority of Saudis and Emiratis listing improving economic opportunities as a priority for their nations.¹³ Moving forward, it seems unlikely that the Gulf states will ever again adopt their once-lax approach to immigration.

In recent years, the Gulf states have begun viewing their security interests with an increasingly broad and ambitious scope, such that the Horn of Africa is seen as a critical arena in which to gain strategic depth against an expansionist Iran. Saudi Arabia and the UAE have long worried about Iranian encirclement through the Strait of Hormuz and Bab-al-Mandeb. These concerns grew more acute when Iran began courting the Houthi movement in Yemen, which has conducted multiple attacks on vessels in the Red Sea and Gulf of Aden. With the Saudi-led coalition's intervention in March 2015 came the need for more bases adjacent to Yemen, giving Saudi Arabia and the UAE an additional impetus to develop their military footprint along the Horn of Africa's littoral. In the two years following the intervention, the UAE opened a base in Eritrea and began construction of another in Somaliland. Saudi Arabia, meanwhile, signed an agreement for a base in Djibouti, though nothing has yet come of the agreement.¹⁴ The growing security presence of Gulf states in the Horn may also reflect these states' concerns that the United States is no longer a reliable guarantor of regional security, a view that is held among the broader public in the Gulf.

An ongoing diplomatic crisis within the GCC that began in June 2017 has spilled into the Horn of Africa, adding another layer of complexity to an already fractured geopolitical landscape. The GCC split—in which Saudi Arabia and the UAE, on one side, seek to outmaneuver Qatar for influence along the Red Sea coast and vice versa—has taken the form of a zero-sum competition. Turkey and Egypt have also become active in this contest, as Turkey has generally aligned with Qatar and Egypt with the Saudi-Emirati bloc. This rivalry has helped fuel the proliferation of Gulf-funded port development and bases along the Horn's littoral as well as a significant influx of other forms of development finance.

In theory, East African states could benefit from Gulf economic interventions in the Horn, but in practice the results have been mixed. Although investments in sectors such as agriculture and tourism are generally positive, Gulf interventions have had notably deleterious effects as

Competing attitudes toward political Islam, and particularly the Muslim Brotherhood, have fueled the GCC rift and influenced how Gulf states approach the Horn of Africa.

well. Because Gulf development finance is driven primarily by geopolitical motivations, East African states face pressure to pick sides in these external rivalries or risk losing valuable economic assistance. This competition has also undermined efforts to stabilize the most conflict-afflicted parts of the region. In Somalia, both Qatar and Turkey have backed the central government in Mogadishu against the federal states supported by Saudi Arabia and the UAE, undermining cohesion in a country that is a byword for state collapse.

Competing attitudes toward political Islam, and particularly the Muslim Brotherhood, have fueled the GCC rift and influenced how Gulf states approach the Horn of Africa. Saudi Arabia, the UAE, and Egypt generally seek to limit the Brotherhood's influence at home and abroad, whereas Turkey and Qatar are more supportive of the movement and similarly aligned groups. The Saudi and Emirati concern over the Brotherhood is largely rooted in the movement's transnational nature, which Riyadh and Abu Dhabi view as potentially undermining their respective monarchies.¹⁵ These divergent attitudes toward Islamism were apparent in how the Gulf states approached the 2019 Sudan revolution that deposed President Omar al-Bashir: Saudi Arabia, the UAE, and Egypt were quick to support the Transitional Military Council (TMC) in part because these governments hoped that the TMC would purge the government of Bashir-appointed Islamists close to Qatar and Turkey.

That said, the Gulf states' attitudes toward Islamist groups can be fluid and, in some cases, pragmatic. Saudi Arabia has shown more tolerance of Brotherhood-aligned groups than the UAE in some quarters, supporting, for example, the al-Islah movement in Yemen against the Houthis. The UAE, in contrast, has repeatedly sought to weaken al-Islah, including through a covert assassination campaign.¹⁶ Abu Dhabi has also demonstrated a willingness to work with hardline Islamists in the region when it suits their interests. The UAE and Saudi Arabia have both cooperated with a Salafi militia in Yemen, the Abu al-Abbas Brigade, whose leader is a US-designated terrorist owing to his al-Qaeda links.¹⁷ In Libya, the UAE-backed Libyan National Army (LNA) of Khalifa Haftar relies heavily on Salafi Madkhali militias, including as part of its failed assault on Tripoli in the spring of 2020.¹⁸ This approach toward Islamism raises the possibility that both sides of the GCC dispute may empower extremist militias across the Horn of Africa as part of their regional competition.

TURKEY

Turkey sees the Red Sea region as not only an integral part of its historical sphere of influence dating back to the Ottoman era, but also a crucial area in which to maintain military access in support of its wider regional ambitions. Turkey was an early participant in combined task forces on both counterterrorism and antipiracy in the region and has an embassy in each of the nine Red Sea littoral countries except Yemen, as well as in Ethiopia and South Sudan. Turkey's closest ties in the Horn of Africa are with the Federal Government of Somalia (FGS),

which receives Turkey's largest assistance program in Africa. Turkey's largest overseas military facility opened in Mogadishu in 2017 with reports that ten thousand FGS troops would be trained there. Turkey is also providing the FGS with equipment to establish a coast guard, and a Turkish firm operates the port of Mogadishu.¹⁹

In the GCC dispute, Turkey is aligned with Qatar. It maintains a military facility with about five thousand personnel in the country and, in 2018, signed another agreement to establish a naval base there.²⁰ In 2017, Ankara signed a ninety-nine-year lease with Sudan to redevelop the Ottoman-era Red Sea port of Suakin. Qatar agreed to provide \$4 billion to develop and manage a port with a naval dock there to be constructed by Turkey.²¹ Saudi Arabia, the UAE, and Egypt claimed this would result in a Turkish military base, which President Recep Tayyip Erdogan denied. The 2019 overthrow of President Bashir in Sudan puts the Turkish-Qatari project in Suakin in limbo given the close Saudi, Emirati, and Egyptian ties to the military elements within Sudan's transitional government.

Turkey's growing presence in the Red Sea cannot be disentangled from Turkish domestic politics. Erdogan's rule is not as secure as he would like it to be: the Turkish lira is imploding, Erdogan is deeply unpopular with significant segments of society, and he lives in fear of a repeat of the 2016 coup attempt that nearly unseated him.²² Adventurism abroad is one way for Erdogan to fire up his nationalistic base and thus partially explains Turkey's recent assertiveness not only in the Red Sea but in Libya and the eastern Mediterranean.

Turkey is attempting to establish the ability to project power from the Persian Gulf to the Horn of Africa to the Mediterranean via bases in Doha, Mogadishu, possibly Suakin, and likely soon in Libya, where two bases are being planned in conjunction with the internationally recognized Government of National Accord.²³ The Mediterranean arena is crucial to Erdogan's ambitions: natural gas discoveries in disputed waters in the eastern Mediterranean are estimated to be worth trillions of dollars, which far surpass Turkey's economic interests in the Horn of Africa. However, given that Turkey is engaged in a tense standoff over these waters with Cyprus, Egypt, France, and, above all, its historic adversary Greece, ramifications for the Red Sea are likely.²⁴ Turkey's aggressiveness in this area has further cemented Saudi and Emirati suspicions of Erdogan, thus in turn making the eastern Mediterranean and the Red Sea more or less a single theater for their competition.

Turkey's behavior in Libya suggests that Erdogan would be willing to ratchet up involvement in conflicts in the Horn of Africa if he believed it would give him an edge over his regional rivals. The likely methods of doing so, such as support for extremist militias and foreign fighters or the exporting of advanced weaponry, would be deeply counter to regional stability and US interests.



A satellite image released in July 2020 shows water filling in the reservoir behind the Grand Ethiopian Renaissance Dam. (Photo by Maxar Technologies via New York Times)

EGYPT AND THE GRAND ETHIOPIAN RENAISSANCE DAM

For much of the twentieth century, Egypt sought to be a symbolic leader of the Arab world and to increase its influence in the Horn of Africa. After overthrowing the democratically elected government of Mohammed Morsi, President Abdel Fattah al-Sisi has made a reassertion of Egyptian influence and prestige in Africa a pillar of his regime, and Egyptian activity along the Red Sea coast has increased in recent years. The country has made efforts to modernize its aging fleet, participated in naval exercises with the Saudis as well as extra-regional partners such as France and Russia, established a major new base along its Red Sea coastline, and begun discussions with Djibouti over a logistics zone near the Bab-al-Mandeb.²⁵ Egypt has aligned with Saudi Arabia and the UAE in the GCC dispute for a number of reasons, including high levels of Saudi and Emirati investment and a shared opposition to Brotherhood-style Islamism. However, Egypt remains wary of ceding too much influence in the Red Sea region to any other Arab state, including its Gulf partners.

The most significant flashpoint for Egypt, though, is not the Red Sea but the Nile River, historically the lifeblood of Egyptian society. . . . The Grand Ethiopian Renaissance Dam . . . looks set to transform relations between Egypt and its upstream neighbors.

The most significant flash point for Egypt, though, is not the Red Sea but the Nile River, historically the lifeblood of Egyptian society. Ethiopia is nearing completion of a \$4.5 billion hydroelectric dam on the Blue Nile, dubbed the Grand Ethiopian Renaissance Dam (GERD), that looks set to transform relations between Egypt and its upstream neighbors. Approximately 95 percent of Egypt's population lives along the Nile or in its delta. Egyptian officials have long warned that the GERD will put those lives at risk. Ethiopia denies this, claiming that the dam will be beneficial to the region and complaining that Egypt has historically been apportioned an unfair degree of control over the Nile's waters under the terms of colonial-era treaties to which Ethiopia was not party.²⁶

Although polarized on nearly every other important issue, the otherwise heterogeneous Ethiopian politic is unified in its support for the dam. The Egyptian government and public are equally unified in their opposition. Both Egypt and Ethiopia have attempted to sway Sudan, home to the confluence of the Blue and White Niles, into their respective camps, which has deepened factionalism within the transitional government in Khartoum.

The GERD could prove to be the catalyst for a military or proxy conflict between Ethiopia and Egypt. Egyptian officials have discussed military action against the project. In 2017, Ethiopian officials accused Egypt of backing Ethiopian rebels in plots to sabotage construction.²⁷ For his part, after initially promising accommodation with Egypt, Prime Minister Abiy Ahmed Ali became bellicose in late 2019, warning that "no force" could stop Ethiopia from building the dam.²⁸

Several rounds of negotiations in the first half of 2020 were unsuccessful. These included a mediation effort by the Department of Treasury that led to accusations of US bias toward Egypt, which were reinforced when the United States indicated that it would suspend some of its aid to Ethiopia.²⁹ Ethiopia began filling the dam in July, presenting Egypt and Sudan (and the United States) with a *fait accompli*. Future negotiations will need to focus on the rate of subsequent filling in the coming years (Ethiopia wants to complete the filling in as few as five years; Egypt has demanded it take place over twelve or more) as well as the operations of the dam.³⁰ Ethiopia hopes to eventually negotiate a new water-sharing arrangement for the Nile that would supersede a 1959 Egyptian-Sudanese agreement to which Ethiopia was not a party.

Although the initial filling did not derail negotiations, the situation could deteriorate. As Abiy faces greater domestic turmoil, he is likely to take an increasingly hard line on the GERD dispute in an attempt to rally support across the country's fractured ethnic and political landscape. His decision to begin filling the dam in July came at a tense moment for the

country—in the wake of the killing of a popular Oromo musician that sparked a bout of violence that left nearly 240 dead.³¹ Bilateral relations between Ethiopia and Sudan have deteriorated in recent months and a border dispute led to brief clashes and several deaths in June.³² Some Sudanese worry that Abiy might use the conflict as a way to pressure Khartoum over the GERD. Even if Egypt were to reach an agreement with Ethiopia over the dam, Sisi might still feel it necessary to take limited covert action against Ethiopia in an attempt to signal that Egypt is not weak. Consequently, although none of the countries involved in the negotiations are proactively seeking military solutions, the risk of conflict remains high.

Saudi Arabia and the UAE may attempt to play a quiet mediating role in the dispute moving forward. Both have a close strategic relationship with Egypt. Both have pledged more than \$3 billion in loans and investment to Ethiopia since Abiy came to power. And both have expressed an interest in greater investment in Sudan's agricultural sector as part of their own food security strategies while seeking to maintain their influence among military factions within the transitional government. Russia has also involved itself in the GERD dispute while attempting to balance its relations between Egypt and Ethiopia. Ethiopia has deployed Russian-made anti-aircraft batteries to protect the GERD, and Moscow has offered to undertake its own mediation.

ISRAEL

Although its engagements in the Red Sea and the Horn of Africa have rarely featured prominently in the Western policy discourse, Israel has had long-standing bilateral relationships, including strong intelligence and security partnerships, with Ethiopia and Eritrea, and maintains a naval base at Eilat in the Gulf of Aqaba on the mouth of the Red Sea. In addition, private Israeli companies with ties to Israel's security establishment have provided training and military and communications equipment, including arms, to various actors in the region. For example, Israeli arms dealers supplied the Sudan People's Liberation Movement (SPLM) during its twenty-five-year war with Sudan. Several Israeli security firms continued to supply the SPLM-led government in Juba with weapons and electronic surveillance equipment after the outbreak of South Sudan's civil war in 2013.³³

Over the last two years, Israel's role has evolved and, like other Middle Eastern powers, it is now taking more assertive action. Prime Minister Benjamin Netanyahu has prioritized diplomacy in Africa more than any of his predecessors. This has reportedly included reaching deals with Uganda and Rwanda to provide asylum to Sudanese, South Sudanese, and Eritrean refugees in Israel in exchange for financial incentives and improved trade links.³⁴

One of the most dramatic developments in the Israeli relationship with the Horn, however, was the meeting in February 2020 between Netanyahu and the head of Sudan's Sovereign Council, Lieutenant General Abdel Fattah al-Burhan, in Uganda. The 1967 summit of the Arab



General Abdel-Fattah al-Burhan, head of Sudan's Transitional Military Council, speaks during a military-backed rally in Omdurman district, west of Khartoum, Sudan, on June 29, 2019. (Photo by Hussein Malla/AP)

League in which the “Three No’s” were declared—no peace with Israel, no recognition of Israel, and no negotiations with Israel—was held in Khartoum. Under the Bashir regime, in particular, Sudan provided support to and hosted groups hostile to Israel, such as Hamas and Hezbollah. Media reports suggested that Israel bombed Hamas targets in Sudan in 2009 and 2011 to disrupt the smuggling of arms into Gaza.³⁵

The meeting between Netanyahu and Burhan was portrayed in part as an effort to rehabilitate Sudan's image in Washington and encourage the Trump administration to remove Sudan from the state sponsors of terrorism list. The following day, Secretary of State Mike Pompeo called Burhan to express his gratitude for Sudan's steps to normalize relations with Israel.³⁶ Although the conditions for and extent to which ties have been normalized remains unclear, reports suggest that it has included Israeli access to Sudan's airspace. The meeting generated significant public controversy within Sudan, including among important forces of the reform movement, and further polarized relations between some of the military and civilian elements of the transitional government.

On August 13, 2020, President Trump announced that the UAE had agreed to normalize ties with Israel, making it only the third Arab country to do so (after Egypt and Jordan). Netanyahu agreed to halt the annexation of parts of the West Bank as part of the agreement, which was mediated by senior White House advisor Jared Kushner. US and Emirati officials have suggested that other Arab states will soon follow suit and normalize relations with Israel.

Although it is too early to determine the true impact of the Emirati-Israeli agreement on the wider region, five days after the Emirati announcement, a spokesman for Sudan's Foreign Ministry announced that further talks were underway to normalize Sudanese-Israeli relations. Sudan's acting foreign minister walked back the comments, however, stating that a normalization of ties was not under discussion. The spokesman in question was subsequently fired. During a visit to Khartoum in late August, Pompeo reportedly pressed the Sudanese government to normalize relations with Israel in exchange for the US delisting of Sudan as a state sponsor of terror. Burhan then traveled to Abu Dhabi in September for further discussions with US and Emirati officials on the prospects of Sudanese-Israeli normalization.³⁷ The mixed messaging on Israel reflects divisions within Sudan's transitional government as well as the ongoing controversy over the question of normalization within the country.³⁸ Additional pressure by the United States for rapid normalization therefore risks undermining the transition.³⁹

MULTILATERAL INITIATIVES

A number of attempts have been made to develop a regional multilateral architecture for Red Sea states to navigate and mitigate the competing interests and rivalries. Some of the littoral states and multilateral bodies discussed hypothetical Red Sea forums at various points over the last several decades.⁴⁰ Not until 2018, however, did regional and Western diplomats begin a concerted push for a platform to tackle transregional issues. In June 2018, the Council of the European Union encouraged the establishment of an “organized and inclusive regional forum for dialogue and cooperation around the Red Sea.” The EU and Germany subsequently made one of the first attempts at catalyzing the creation of such a body by inviting some of the Red Sea states for a meeting on the sidelines of the UN General Assembly in September 2018. This effort failed to gain traction, however—partly because of disagreement over whether Western states should be involved in such a forum, but also because of questions about the inclusion of certain regional states.⁴¹

More recently, African efforts to align the positions and interests of African states, solidify a commitment to multilateral approaches, and prepare for discussion about what is needed in the region have gathered steam. The impetus has been due in part to the aspirations of the African states to level the playing field with the Gulf states, allowing African governments to deal with their Gulf counterparts on “a more equal and less transactional basis.”⁴² The AU became more engaged in Red Sea issues in 2018 and 2019. The AU High Level Implementation Panel, led by former South African President Thabo Mbeki, is charged with promoting regional cooperation

and has held a series of consultations around the continent and with the Gulf to discuss potential initiatives for peace and security in the Horn of Africa.

In 2019, the Intergovernmental Authority on Development, East Africa's regional body, established a task force on the Red Sea and the Gulf of Aden, led by Special Envoy Mohammed Guyo of Kenya. The task force has undertaken a series of consultations with its member states in an effort to develop a common position and set of priorities on the Red Sea.⁴³ Egypt, however, has opposed the idea of engagement from IGAD, which it views as a vehicle for Ethiopia's interests in the Red Sea arena. These concerns are not unfounded, given that Ethiopia had managed to dominate the organization, at least until Sudanese Prime Minister Abdalla Hamdok ascended to the chairmanship in 2019. Whether IGAD has the influence or resources to take the lead on Red Sea issues is not clear. It has, though, expressed consistent interest in working more closely with the United States on these issues.

Eritrea has also traditionally been skeptical of existing multilateral bodies, accusing the AU on several occasions of being a tool of Western and Ethiopian hegemony. Eritrea briefly suspended participation in the body in 2009 and has twice withdrawn as well. President Isaias Afwerki has at various points since the 1990s sought broader regional integration on his own terms, however, and has revived these efforts since the country's recent rapprochement with Ethiopia. Since 2018, Isaias has proposed deepening cooperation with Ethiopia and Somalia (the so-called Cushitic Alliance) to promote integration without ceding sovereignty to existing multilateral bodies. (Isaias may also seek to undercut the growing clout of Ethiopia, which he still views with some suspicion.) To date, however, the Eritrean-Ethiopian rapprochement has yielded few lasting peace dividends, and broader regional integration remains elusive.⁴⁴

Egypt and Saudi Arabia began their own joint effort to develop a Red Sea forum at about the same time as the AU and IGAD. Although the two countries are aligned on a host of regional issues, Cairo and Riyadh have historically competed for influence in the wider Arab world. Significant disagreements soon arose between the two over the structure and objectives of the forum. Beginning in 2018, Egyptian officials were particularly concerned that Saudi Arabia would seize the initiative from Egypt and exercise disproportionate influence over the forum, using it as a vehicle for its interests in the Horn of Africa and Yemen. These disagreements reflect a larger frustration on the part of Egyptian officials with the degree to which Egypt must defer to Saudi Arabia, its major financial benefactor, on regional issues.⁴⁵

Saudi Arabia eventually succeeded in establishing the forum it sought, albeit with some concessions to Egypt and other states that had been holding out, such as Eritrea (which joined at Saudi Arabia's insistence but likely remains opposed to ceding any autonomy to the new body). In January 2020, the Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden, known informally as the Red Sea Council, was announced at a ministerial-level meeting in Riyadh. The council consists of all Red Sea littoral countries except Israel. Saudi Arabia is

expected to provide most if not all of the funding for the initiative, leading to Egyptian concerns of a Saudi-dominated forum. Although the Riyadh-based body is set to be quite top heavy—to include a supreme council, ministerial council, and general secretariat—the charter suggests that decision-making will occur on a consensus basis, which Egypt had pushed for as a check on Saudi influence.⁴⁶ Informally, Saudi observers have suggested that the council’s true function is to mobilize a coalition to confront Turkish and Iranian influence in the Red Sea.

Since it began its push for a Red Sea council, Saudi Arabia has led several multinational military exercises in the region. In January 2019, it hosted Red Wave 1, which the Saudis heralded as their first joint drill promoting naval security in the Red Sea, and it hosted a follow-up exercise that September. Both exercises involved forces from six other Red Sea nations, including Egypt and Sudan. Shortly after the Red Sea Council was announced in January 2020, Saudi Arabia and Egypt conducted another training exercise, Morgan-16, in the Red Sea. Nonlittoral actors have also engaged in Red Sea exercises of late. The United States, the UAE, and Egypt conducted a naval exercise in July and August 2019, to which Saudi Arabia was an observer. Another, dubbed Blue Sword 2019, saw Chinese and Saudi vessels engage in joint drills in November 2019. The Egyptian navy held separate exercises with the Chinese and Russian navies in the Mediterranean in late 2019, and the Egyptian and French air forces conducted joint drills in the Red Sea and the Mediterranean in February 2020.

As in previous discussions of a Red Sea forum, the question of membership remains a sticking point within this new Red Sea Council, particularly the question of whether nonlittoral states active in the region might gain some sort of observer or partial status. This could prove problematic. For example, Egypt objects to Ethiopian participation in the council, yet the absence of Ethiopia, given its centrality to the politics of the Horn and therefore the Red Sea, may limit the effectiveness of any cooperative arrangements that could emerge.⁴⁷ The UAE is also not a member despite its significant political, security, and economic investments on the western side of the Red Sea, which may indicate some measure of Saudi-Emirati competition for influence in the region in parallel with their myriad instances of cooperation.

Finally, some country-specific multilateral bodies are engaged on Red Sea issues. For example, the Yemen Quad, established in 2016 and composed of the United States, the United Kingdom, Saudi Arabia, and the UAE, was repurposed in 2019 as a Sudan Quad with the same membership.

Historic Transitions

Two of the most profound political transformations in Africa since the end of the Cold War are underway in Ethiopia and Sudan. Should they succeed, the countries could serve as lodestars for democratization and good governance in the region. Should they fail, state fragmentation and civil war could follow, destabilizing the wider region and damaging US interests as well as those of allies and partners in Europe and the Middle East.

BOX 1

Sudan: A Case Study in More Effective Bureaucratic Coordination

Within the US Department of State, coordination on Red Sea issues between the Bureaus of African Affairs and Near Eastern Affairs has traditionally been minimal. This is partially driven by the asymmetry between the two bureaus. For example, Gulf state interventions in the Horn are a top concern for officials in the African bureau given how much influence Gulf states wield in the region. By contrast, officials in the Near Eastern bureau prioritize other issues such as Iran, the GCC dispute, the Israeli-Palestinian conflict, and the wars in Syria and Yemen, relegating Red Sea issues to a lower rung on the agenda.

US diplomatic engagement following the ouster of Sudanese president Omar al-Bashir is one of the few examples to date of more effective coordination between the African and Near Eastern bureaus. Cognizant of the strategic significance of Sudan to the wider Red Sea region as well as the high degree of Saudi, Emirati, and Egyptian influence over the Transitional Military Council that deposed Bashir, the Near Eastern bureau provided support to African

bureau officials to stabilize the negotiations that led to the formation of a transitional government.

The appointment of Ambassador Donald Booth as US Special Envoy to Sudan in June 2019 was a critical bureaucratic step. The special envoy was able to coordinate policy formulation across the State Department's regional bureaus and with regional embassies. He was also well positioned to maintain a direct line of communication with senior State Department officials and with other agencies while publicly articulating US policy in Sudan in order to avoid mixed messaging from different government agencies. The special envoy and the deputy assistant secretary of state for Arabian Gulf Affairs traveled together to the Gulf, underscoring to Gulf officials that the Near Eastern bureau was actively engaged in Sudan's transition.^a The undersecretary of state for political affairs consistently encouraged coordination between the Near Eastern and African bureaus, making it clear to staff in both bureaus that Sudan had become a higher priority issue.

Notes

Much of this information is derived from interviews with officials from the Bureaus of African Affairs and Near Eastern Affairs at the US Department of State between April and August 2020.

a. Saudi Press Agency, "Al-Jubeir Meets with US Deputy Assistant Secretary of State for Arabian Gulf Affairs and US Special Envoy for Sudan," July 17, 2019, www.spa.gov.sa/viewfullstory.php?lang=en&newsid=1947924.

For nearly three decades, Ethiopia has been a quintessential authoritarian "developmental state," making impressive strides in economic growth but stifling political freedoms. This trend began to change in early 2018 when, after several years of ethnically charged antiregime protests, Prime Minister Hailemariam Desalegn resigned. His replacement, Abiy Ahmed, the nation's first prime minister from the long-marginalized Oromo ethnic group, pledged to be a reformer. He initially oversaw a release of political prisoners, relaxed restrictions on independent media, sought to liberalize the economy, and explored a rapprochement with Eritrea

and an end to a twenty-year border conflict—an achievement for which he was awarded the Nobel Peace Prize. Abiy's tenure, however, also saw a surge in political and ethnic violence, which led in 2018 to the largest internal displacement on the continent.

Constitutionally mandated elections scheduled for August were postponed due to the COVID-19 pandemic and no date was set for a future vote. In June, the Ethiopian parliament approved an extension of the current members' terms, a move that Abiy's detractors condemned as unconstitutional. Meanwhile, relations between Abiy and authorities in Tigray state, which is led by the party that dominated Ethiopia's ruling coalition before Abiy came to power, have continued to deteriorate.⁴⁸ Tigrayan authorities, for example, proceeded with holding regional state elections in September in defiance of the federal government.⁴⁹

The federal government has to some extent reverted to the authoritarian tactics associated with its predecessors. The authorities have shut down the internet in parts of the country. Credible accusations of gross human rights violations, including torture and extrajudicial killings, by the security services have surged.⁵⁰ Mass arrests, including all major opposition figures, have taken place since the murder of a popular singer in June 2020 and subsequent unrest.⁵¹ To date, Abiy has shown little willingness to build a national consensus around an interim political arrangement that could defuse the electoral controversy, address mounting political polarization, and prevent the escalation of violence.

Sudan also finds itself in the midst of a profound and uncertain political transition. Anti-austerity protests erupted in December 2018 and quickly morphed into calls for the end of President Omar al-Bashir's brutal thirty-year reign. On April 11, 2019, days after members of the army and police began defecting to the protesters' camp, a loose coalition of security figures arrested Bashir and announced that the newly formed Transitional Military Council would lead the country. The civilian protest movement celebrated Bashir's ouster but called for a rapid transition to civilian rule and continued its mass, nonviolent mobilization to support its demands.

After months of negotiations supported by the AU and Ethiopia and following a massacre of demonstrators in June 2019 that brought widespread international condemnation, Sudan's leading civilian opposition movements signed a power-sharing agreement with the TMC in August 2019. The agreement created an eleven-person Sovereign Council—made up of both security and civilian figures but skewed toward the former—to govern Sudan for thirty-nine months, when national elections would be held. It also established a technocratic cabinet led by a civilian prime minister, Abdalla Hamdok.⁵² (See box 1 for a discussion of US diplomatic responses to Sudan's transition.)

In the political realm, Sudan's elites remain divided. The deal struck between the civilian and security elements remain fragile. Power remains contested among and within the civilian and security components of the Sovereign Council; the cabinet; and the Forces for Freedom

and Change (FFC), the umbrella organization of the protest movement. Rumors among the civilian opposition of an impending military takeover are continual. These rumors, even if unfounded, attest to the degree of suspicion and hostility between civilian leaders and the security forces.⁵³ The FFC is made up of a disparate set of political parties, veteran politicians, unions, and activists that span the ideological spectrum and often have competing interests. The Sovereign Council has not eradicated the many organizational and personal rivalries within the security sector either, particularly between the military, as embodied by Sovereign Council chairman al-Burhan, and the powerful Rapid Support Forces, a militia led by the Council's vice chair, Mohamed Dagalo (Hemetti). In March, Prime Minister Hamdok survived an assassination attempt by unknown assailants in Khartoum.⁵⁴ Egypt, the Gulf states, Israel, and others have not hesitated to intervene on behalf of their preferred clients.

Sudan remains in the midst of a protracted economic crisis that began under Bashir—and was the proximate cause of the protests that led to his downfall—but has worsened under the transitional government. The country's real GDP contracted by 2.5 percent in 2019, and inflation was above 60 percent even before the COVID-19 outbreak.⁵⁵ By August 2020, inflation had risen to 81.3 percent, and the value of the Sudanese pound had declined from 45 to the US dollar in August 2019 to 200 a year later.⁵⁶ The most devastating floods to afflict the country in a century have further exacerbated the economic spiral.⁵⁷

Demographics and Citizen Priorities

The population of the Horn of Africa is projected to nearly double by 2050, from just over 280 million to approximately 530 million. This population is exceedingly young, some 43 percent being under the age of fifteen. Although urbanization has accelerated in recent years, East African societies remain primarily rural and home to approximately 73 percent of the region's population. Egypt's population is also growing quickly, though at a lower rate, an anticipated increase of nearly 60 percent, to 158 million, by 2050. Egypt is also a youthful society, with some 34 percent of its population under the age of fifteen. A small majority of the population (57 percent) live in rural areas. By contrast, the Arab Gulf states, where only 22 percent of the population is under fifteen, have a much older population. It is therefore unsurprising that the region's population is expected to increase only 34 percent by 2050. The population of the UAE, in fact, is expected to peak in the 2030s. In contrast to Egypt and the largely agrarian states in the Horn, 87 percent of the Arab Gulf states' population is urban. The Gulf states also host a large number of migrant workers, including many from the Horn of Africa. In 2019, the number was estimated at thirty-five million, relative to fifty-seven million native citizens.⁵⁸

At the same time, the states of the Horn of Africa and Yemen are two of the world's most impoverished and food insecure regions. Four of the thirty countries with the most people living below the poverty line are in the Red Sea region. South Sudan has the largest percentage, at

FIGURE 2

Attitudes on Key Governance and Social Issues

Elections and Democracy

Support for elections as the means of choosing national leaders was stronger in the Red Sea nations of Kenya, Sudan, and Uganda than for Africa as a whole (75%).



Percentage of respondents who “agree” or “agree very strongly” that leaders should be chosen through regular, open, and honest elections.

Emigration

Many Africans continue to view leaving their country as the best path to a better future.



Percentage of respondents who said they considered emigrating “a lot” or “somewhat/a little.”

Governance and Corruption

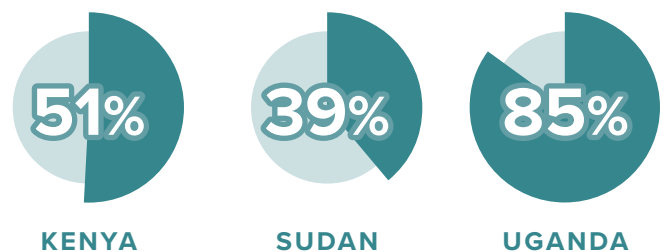
Significant majorities feel their governments are not doing enough to investigate, prosecute, and sanction cases of corruption in the public and the private sectors.



Percentage of respondents who think their government is doing a bad job of tackling corruption.

Climate and Agriculture

A plurality of Kenyans and Sudanese and an overwhelming majority of Ugandans feel that weather patterns are worsening for growing crops.



Percentage of respondents who say that climate conditions for agricultural production have gotten “worse” or “much worse” over the past decade.

Note: Data from surveys conducted between September 2016 and September 2018. Michael Bratton and Sadhiska Bhoojedhur, “Africans Want Open Elections—Especially If They Bring Change,” Policy Paper no. 58, Afrobarometer, June 2019 (top left); Josephine Appiah-Nyamekye Sanny, Carolyn Logan, and E. Gyimah-Boadi, “Young and Educated Africans Most Likely to Consider Moving Abroad,” Dispatch no. 288, March 2019 (top right); Coralie Pring and Jon Vrushu, “Global Corruption Barometer Africa 2019: Citizens’ Views and Experiences of Corruption,” Transparency International and Afrobarometer, July 2019 (bottom left); and Edem E. Selormey et al., “Change Ahead: Experience and Awareness of Climate Change in Africa,” Policy Paper no. 60, Afrobarometer, August 2019 (bottom right).

Public polling has made clear that the Horn's citizens believe that democracy is the best way to handle the challenges their nations face, a majority of respondents in Sudan, Kenya, and Uganda supporting regular, open, and honest elections.

82 percent, according to World Bank figures. This poverty, coupled with climatological factors, has led to monumental food security crises. The Gulf states, despite not having any natural water sources, have been able to afford significant food imports to offset food insecurity.⁵⁹

Twenty percent of the world's severely food insecure people live in the Horn. The World Food Programme (WFP) has declared Level 3 emergencies—the most severe level of crisis—in Yemen and South Sudan.⁶⁰ Additionally, according to integrated phase classification (IPC) food security metrics used by the United Nations, Ethiopia, Somalia, Kenya, and Sudan are all experiencing either Phase 4

(emergency—one step short of famine) or Phase 3 (crisis) levels of food insecurity.⁶¹ More than half of South Sudan's population is acutely food insecure.⁶²

Yemen has one of the highest rates of undernourishment in the world, and more than two-thirds of the country—twenty-one million people—face some degree of food insecurity.⁶³ The locust swarms ravaging East Africa, particularly Ethiopia, Somalia, and Kenya, pose an additional unprecedented challenge and are liable to aggravate the region's existing food insecurity. The WFP has described the swarms as “a scourge of biblical proportions . . . unprecedented in modern times” and warned that, if left untreated, the cost of handling the ensuing food insecurity will amount to more than \$1 billion, more than fifteen times the amount the WFP has requested to date to prevent the spread of the locusts.⁶⁴

East African states face profound economic challenges arising from these demographic trends. Ethiopia, for example, must create two million jobs a year to keep pace with the number of youth entering the workforce; the most optimistic analysis suggests it is meeting less than one-third of that target.⁶⁵ The consequences of governments' failure to address their citizens' economic needs can be transformational, as seen in the case of the anti-austerity protests that eventually toppled President Omar al-Bashir in Sudan. Additionally, climate change risks are compounding the region's existing economic woes. More than half of farmers in Kenya and Uganda have reported that changes in climate have adversely affected agricultural production over the past decade.

Public polling has made clear that the Horn's citizens believe that democracy is the best way to handle the challenges their nations face, a majority of respondents in Sudan, Kenya, and Uganda supporting regular, open, and honest elections (see figure 2).⁶⁶ Support for democracy was slightly lower in both Somalia and the self-declared Republic of Somaliland, but a plurality of those populations (43 percent in each case) nonetheless stated that democracy is preferable to other forms of government. It was also clear that discontent with the state of governance in the Horn is widespread. Citizens frequently identified corruption and the inaccessibility of public services as the most pressing issues. In Somalia (minus Somaliland), half of all citizens had faith

in the federal government, though a majority expressed a desire for more service delivery and a willingness to pay more taxes to finance such improvements.⁶⁷

Between limited economic opportunities and seemingly unresponsive governments, that so many in the Horn have chosen to emigrate is not surprising. In Sudan, fully half the population had considered emigrating. In 2018 and 2019 alone, just under three hundred thousand people fled from the Horn of Africa to Yemen in the hopes of reaching Saudi Arabia.⁶⁸ Many analysts consider migration to the Gulf to be a “release valve” for states like Ethiopia, but this option is becoming more limited, which could in turn exacerbate instability at home. Saudi Arabia has recently begun deporting Ethiopians en masse—some 260,000 were repatriated between May 2017 and March 2019—and refused to stop deportations at the beginning of the COVID-19 pandemic despite international criticism.⁶⁹ Such deportations are not likely to deter a significant number of migrants, however, if conditions in their home countries do not improve, suggesting that migration will continue to be central to the Gulf states’ relationship with the Horn of Africa for the foreseeable future. These dynamics, as well as the possibility of increased numbers of migrants from the Horn attempting to reach Europe, further underscore how instability and economic challenges are liable to produce a ripple effect that will be felt far outside the region.

The Arab states have also struggled to define a new social contract in the wake of the so-called Arab Spring. The primary conditions that drove the 2011 protests—corruption and poor economic performance—remain widespread across the Arab world and democratic avenues for redressing these issues are severely restricted or nonexistent. The Gulf states tend to be perceived as less corrupt than the rest of the Middle East, with the UAE, Qatar, and Saudi Arabia all ranking better than the global average on Transparency International’s 2019 Corruption Perceptions Index. Even in these countries, however, citizens expect their governments to do more to promote economic opportunity and reduce corruption: 63 percent of Saudis think their government’s efforts to reduce corruption are inadequate, and citizens in both Saudi Arabia and the UAE consider economic issues a top concern. Real or anticipated social reforms have also proven contentious in the Gulf states, with 75 percent of Saudis disapproving of more moderate forms of Islam and nearly 50 percent of Emiratis saying that their government has done too much to promote gender equality. Further, minimal public discussion of civil liberties or democracy in the Gulf monarchies does not mean that the concerns are entirely absent. In the wake of the murder of journalist Jamal Khashoggi by agents of the Saudi government in October 2018, a narrow plurality of Saudi citizens (36 percent) felt that the government was doing too little to protect the freedoms and privacy of its citizens.⁷⁰

Corruption is a larger concern for Arab citizens outside the Gulf states. Egypt ranked 106 in 180 nations in the 2019 Corruption Perceptions Index. Yemen ranked 176. In recent polls, Egyptians identified economic underperformance as their top concern and expressed disappointment in their government’s handling of economic issues, with only a little more than one in five of respondents approving of the government’s performance.⁷¹

Emerging Maritime Threats

Despite the obvious global ramifications of a conflict there, the Red Sea is overlooked in regard to emerging maritime threats.⁷² At risk are international trade, global internet service, and environmental stability.

The Red Sea provides direct passage from and to the Arabian Sea and the Mediterranean through the Suez Canal to the north and the Bab-al-Mandeb strait to the south. Control of these two points—which a well-executed attack could achieve—would amount to control of international shipping and have serious consequences for the global economy. Rerouting shipping lanes around the Cape of Good Hope off South Africa, the sole alternative to the Red Sea, would not only be three times as long but also expose shipping to new security vulnerabilities. Even extensive use of mines could disrupt shipping in a significant way for an extended period.

The region has seen many maritime attacks, in particular by Somali pirates in the Gulf of Aden. Several occurred in the Red Sea itself, for example, simultaneous Houthi attacks on two oil tankers in July 2018 that temporarily halted traffic through the Bab-al-Mandeb strait. Since mid-2019, the Saudi-led coalition in Yemen has claimed to have disrupted multiple attacks by Iranian-backed Houthi forces in the Red Sea. Somali piracy in the northwestern Indian Ocean and Gulf of Aden also persists despite multinational naval efforts over the last decade and improved commercial shipping security. Most important in this regard, however, is that focus on piracy has obscured other maritime threats.

The breadth of the threats is staggering—from illicit weapons trade to goods smuggling to drug movements to internet security to human trafficking to dumping to unsustainable fishing practices. More specifically, the systems for trafficking of weapons are becoming decidedly more complex, such as using uninhabited rocks as transshipment points for local fishermen to collect and ferry weapons to shore (see box 2). Smuggling of goods continues to fund and otherwise support criminal and terrorist groups in the region, al-Shabaab among them. Ever more heroin moves from Asia through the Red Sea, creating addiction in areas that have little history of drug use, thanks to traffickers who are paid in kind rather than cash. Humanitarian desperation in the region has led to a sharp rise in human trafficking. The marine environment is also threatened, from not only industrial dumping of biological hazards and unsustainable fishing practices but also sea level rise and increased temperatures. Cybersecurity is an especially serious issue. Cables run underneath both the Red Sea and the Gulf of Aden, supplying nearly a third of the world's internet service. Severing the cable off the coast of Egypt, for example, would immediately render the entire region highly vulnerable and risk catastrophic economic fallout. Cyberattacks can disrupt or undermine international shipping. Successful attempts have ranged from email scams demanding hundreds of thousands of dollars to transit the Suez Canal to hacking the controls of Gulf pipelines. The rise of autonomous shipping raises the possibility that hackers could seize control of ships remotely.

BOX 2

Arms Trafficking

The Red Sea region is a major hub for weapons trafficking. This presents a cyclical challenge for the region: illicit networks compound instability in fragile states like Ethiopia and Sudan. The more these states destabilize, the more likely existing illicit networks will benefit from the lawlessness and expand, further compounding instability.

Iran is a significant trafficker of weapons across the region, particularly in Yemen, where Tehran supports the Houthi movement. Arms researchers suspect a connection between Chinese small arms manufacturers and Iranian traffickers, with Chinese weapons landing in the arms of Houthi forces as well as in Somalia. Although African militant groups like al-Shabaab have likely obtained weapons from Iranian traffickers, those relationships remain transactional. No evidence suggests that Iran is arming extremist groups in the Horn of Africa for political or ideological reasons. Nor is Iran solely responsible for the spillover of weapons from Yemen into the Horn. Weapons provided by the Saudi-led coalition to local Yemeni forces have surfaced in Somalia. This is no reason to believe, however, that the action is coalition policy or that Saudi or Emirati officials are profiting from the trade.^a The Yemeni civil war has certainly compounded Somalia's smuggling problem, but the proliferation of weapons in Somalia long predates the conflict: the

country has been awash in weapons, including those made in the United States and Europe, since the Cold War.

Illicit arms reach the Horn of Africa through a number of channels. Given the decline of Somali piracy in recent years, former pirates have shifted to smuggling weapons into the Horn and smuggling migrants into the Arabian Peninsula. Somalia's semi-autonomous Puntland region is a notable entry point for arms, with Puntland officials sometimes taking part in the trade. Meanwhile, new leadership in Sudan has acknowledged the country's historical role in the regional arms trade and pledged more transparent counter-smuggling efforts. In Eritrea, state-directed arms smuggling has decreased since the early 2010s, but concerns remain that Eritrean officials are active in the trade for business reasons.

Ethiopia has seen a dramatic spike in weapons seizures since Prime Minister Abiy came to power.^b The weapons most commonly seized are Turkish-manufactured blank-fire pistols that can be easily modified to fire live ammunition.^c Such pistols are generally associated with common criminal activity rather than insurgency or terrorism, raising the question of what role the pistols are playing in the political and ethnic violence currently roiling Ethiopia.^d

Notes

- a. Michael Horton, "Arms from Yemen Will Fuel Conflict in the Horn of Africa," *Terrorism Monitor*, April 17, 2020; and Jonathan Fenton-Harvey, "Weapons Trafficking Fuels Conflicts in Yemen and Africa," *Inside Arabia*, January 30, 2020.
- b. Reuters, "Ethiopia Passes Gun Control Law to Tackle Surge in Violence," January 9, 2020; and *Ethiopian Monitor*, "Ethiopia Seizes 18,000 Turkish-made Illegal Firearms," March 11, 2020.
- c. *Egypt Today*, "Sudanese Authorities Seize Smuggled Turkish Weapons Heading to Ethiopia," June 24, 2020.
- d. Interview with Jonah Leff, Conflict Armaments Research, March 2020.



A temperature check for possible COVID-19 infection is performed at the Zewditu Memorial Hospital in Addis Ababa, Ethiopia, on March 18, 2020. (Photo by Mulugeta Ayene/AP)

Implications of the Pandemic

The devastating effect that the COVID-19 pandemic has already had on industrialized economies with strong health systems should be a signal flare for less developed, conflict-afflicted regions such as the Horn of Africa. The region—like much of the African continent—suffers from weak health systems, poor sanitation, and the prevalence of existing diseases, including some of the highest rates globally of severe respiratory diseases such as tuberculosis and pertussis. Many countries in the Horn have recorded relatively low case counts to date, but the count could be attributed to a lack of testing capacity and obstacles to data access.⁷³ The Horn is acutely vulnerable to economic shocks because of its overreliance on commodity exports and its overexposure to the Chinese market. It also receives significant aid and investment from the Gulf states, now on the decline because of a contraction of the Gulf economies and the plunge in oil prices. Finally, analysis of the economic impact of the mid-2010s Ebola crisis in West Africa suggests that the COVID-19 pandemic will result not just in macroeconomic but in microeconomic devastation, which could be debilitating for Horn economies that remain largely agrarian and pastoral.

Major economic disruption is already underway. Exports are contracting. Jobs, especially in the informal sector (in which most of these citizens are employed) are disappearing. Remittances from the United States, Europe, and in particular the Gulf, where an estimated 64 percent of remittances to the Horn originate, are at risk of drying up. The World Bank predicts that remittances to all of sub-Saharan Africa, which sustain millions of households, will drop by about 23 percent in 2020.⁷⁴

In Ethiopia alone, one projection estimates that GDP growth could drop from over 8 percent in FY2019 to 2.6 percent in FY2020 and 0.6 percent in FY2021.⁷⁵ As the fiscal outlook deteriorates, public budgets to support employment and social services are being decimated. Foreign currency reserves are shrinking, which risks impeding the purchase and import of medicine and other essential commodities.

This impact will radiate outside the Horn throughout the Red Sea region, and attempts to contain the consequences of the pandemic within the Horn itself are likely to foster even greater insecurity. Economic isolation will exacerbate economic crisis, which is one of the main drivers of regional instability. The closure of borders will impede the delivery of necessary humanitarian assistance, deepening existing humanitarian crises, as well as the response to the locust infestation. Sealing off refugee camps—or entire countries—will only transform them into incubators of infection and permanent hot spots from which COVID-19 could metastasize globally for years to come. The pandemic could thus irreparably undermine the transitions in Ethiopia and Sudan and put the very survival of these states at risk.

Despite a commitment from the G20 in March 2020 to mobilize development and humanitarian resources for Africa, both bilateral and multilateral assistance has been mobilized on a country-by-country rather than a regional basis that accounts for the transregional nature of the challenge and the opportunity to advance new mechanisms for cooperation. In addition, if assistance is not anchored in the emerging consensus on preventing and mitigating violence in fragile states, including by promoting inclusive, legitimate governance and addressing inequality and injustice, it will reinforce existing political divisions, fault lines, and power imbalances.

Extra-Regional Actors

As US political engagement in the Red Sea region has declined over the last decade, the region has attracted considerably greater attention and military engagement by other extra-regional actors. This engagement has been driven largely by the Red Sea's economic importance as well as by security threats such as the growth of extremist groups in the Horn of Africa and Yemen and Somali piracy. Increased Chinese and Russian activity in the region, along with Iran's ongoing efforts to exert its presence around the Bab-al-Mandeb, threaten to further undermine US leadership in the region. Although the increased engagement of US allies and partners such as EU member states, Japan, and India is itself a positive development, the lack of a regional political or security architecture hinders the ability of the United States to leverage these partnerships.

China

The Chinese military presence in Djibouti is a concrete manifestation of the Red Sea arena's status as the effective western flank of competition within the Indo-Pacific theater, further underscored by US Deputy National Security Advisor Matthew Pottinger's suggestion in early 2020 during a bilateral forum with India that the Trump administration was replacing the Hollywood to Bollywood geographic frame with one focused on California to Kilimanjaro.⁷⁶

Although China's military presence has expanded, including through participation in counterpiracy and UN peacekeeping missions, its engagement in the Red Sea arena remains anchored in economic activities. Beijing has not indicated interest in becoming the region's primary security provider, and has no prospect of equaling the US military commitment in the region in the foreseeable future.

Although civil society stakeholders in the Horn have expressed significant concerns about Chinese complicity in government corruption as well as the implications of Chinese-owned debt, both African and Middle Eastern Red Sea states have welcomed China's economic engagement and resisted choosing sides between the United States and China. China has refrained from intervening politically in the region's conflict and rivalries. In addition, since the onset of the transitions in Ethiopia and Sudan, it has played a lower-profile diplomatic role than it did, for example, in the conflict in Sudan and South Sudan.⁷⁷ That Muslim-majority countries in the region have assiduously avoided criticizing China for the detention of large numbers of its Muslim Uighur community indicates how much influence China has built in the region in recent years. Many of these countries have in fact openly supported China's policies in the Xinjiang region.⁷⁸

As of 2018, China's total trade volume with Red Sea states (including energy) stood at \$93 billion, with China ranking as the largest or second-largest trading partner for most of them.



The first cargo train departs the Mombasa, Kenya, port containers depot on the Chinese-built Standard Gauge Railway on May 30, 2017. (Photo by Khalil Senosi/AP)

Much of the trade consists of oil and liquefied natural gas exported to China. The GCC states, which are presently negotiating a free trade agreement with China, account for 28 percent of China's imported oil.

The maritime component of China's Belt and Road Initiative, President Xi Jinping's signature foreign economic policy, passes through the Gulf of Aden, Red Sea, and Suez Canal. China attaches enormous importance to this connection between the Indian Ocean and Mediterranean because of its need to ensure access to this sea lane that carries so much of China's trade. In 2017, for example, 16 percent of China's exports went to European Union countries, while 9 percent of the EU's exports went to China. Nearly all of this trade transits the Red Sea. China consequently does not want to outsource protection of this sea lane to the United States or any other naval power.

China is the largest contractor for infrastructure projects in countries on the African side of the Red Sea. In East Africa, Chinese companies have built railways and hydropower dams. China built port facilities in Djibouti and recently obtained a degree of operational control over the Doraleh container terminal there. According to Djiboutian officials, Djibouti's debt to China is equivalent

to 71 percent of the country's GDP. China also holds 34 percent of Ethiopia's external debt. Egypt, Ethiopia, Djibouti, and Sudan have each joined the Asian Infrastructure Investment Bank, as have all GCC members. China is also an important source of FDI in the region. Chinese firms hold stakes in the oil sectors of Sudan and South Sudan and in Maersk's container facility at Port Said at the southern end of the Suez Canal. Chinese companies operate two of Egypt's ports on the Mediterranean and have completed major infrastructure projects throughout the Suez Canal zone.

China is also getting out in front as the region's leading provider of IT equipment, particularly through Huawei. In the Middle East, Huawei dominates 5G mobile networks: both Saudi Arabia and the UAE have signed up. China's technology partnerships in Africa go beyond 5G: China launched Ethiopia's first satellite in December to help in collecting agricultural data. Additionally, a Chinese firm has signed a joint venture with a UK-based company to install an underwater internet cable system linking Pakistan, South Africa, Kenya, Somalia, Djibouti, Egypt, and France.

China's growing economic footprint in the region has been accompanied by a growing military presence. In 2008, the People's Liberation Army Navy (PLAN) joined the international antipiracy operation in the Gulf of Aden as an independent participant. It has sent a task force to the Gulf of Aden about every three months since. In 2011, Beijing had to evacuate nearly thirty-six thousand Chinese nationals from Libya following the overthrow of Muammar Gadhafi and the outbreak of civil war. In 2015, the PLAN evacuated nine hundred Chinese and foreign nationals from two ports in Yemen during its civil war. The Libya evacuation and rising piracy convinced China's leaders that it needed a permanent naval support facility in the region. China consequently established in Djibouti its first overseas military base in 2017. The base likely hosts about two thousand Chinese military personnel but could accommodate up to ten thousand. It also has hangars for helicopters and unmanned aerial vehicles and docking facilities for ships.

The Chinese government justifies its military presence in Djibouti by pointing to its participation in antipiracy operations and UN peacekeeping operations in Africa, as well as the need to have a standby force for evacuations of Chinese citizens from regional hot spots. In addition, the military base and continuing PLAN presence in the region provide China with an opportunity to train its personnel in the far seas and to test equipment under varied conditions. The PLAN also learns about other navies as its vessels engage in exercises with both navies of Red Sea littoral countries and nonregional navies. Personnel at the Chinese base also collect intelligence on other military forces in the region. Finally, China has begun selling and jointly developing weapons systems in the Gulf, particularly Saudi Arabia and the UAE.

Europe

The EU member states are most concerned about freedom of navigation through the Red Sea for commercial purposes given that much of their trade transits the Red Sea. To protect shipping from Somali pirates, the EU launched its first joint naval operation, EU NAVFOR, in 2008. Several

EU member states also have security interests related to counterterrorism and migration. The EU and its member states have traditionally been the largest provider of development and humanitarian aid to African Red Sea countries. France relies on the Suez Canal to resupply its Overseas Departments of Réunion and Mayotte in the western Indian Ocean and has had a military base in Djibouti since colonial times. Its military presence there has been drawn down to about 1,450 personnel and a squadron of Mirage combat jets. In 2019, landlocked Ethiopia signed an agreement with France to help build an Ethiopian navy, presumably to be based in neighboring Djibouti.⁷⁹

Although France has reduced its military presence in the Horn in recent decades—the United States’ Camp Lemonnier was previously a base for the French Foreign Legion—the US-French military relationship remains strong across Africa. This is particularly true in the adjacent Sahel region where AFRICOM provides significant support, including in logistics and intelligence, to the roughly 4,500 French soldiers involved in counterterrorism and stabilization under Operation Barkhane. Germany and Spain maintain small contingents of forces, each numbering a few dozen, at the French base in Djibouti. Italy also maintains a small contingent at a base it opened in Djibouti in 2013. All three countries are participants in EU NAVFOR.

The United Kingdom participates in counterpiracy task forces in the Red Sea region. It also has a permanent military base and training center in central Kenya and has expanded its footprint in Somalia, opening a small training center for Somali soldiers in June 2019. Across the Red Sea, Royal Air Force personnel have helped train Saudi pilots and maintain Saudi aircraft. Additionally, the British firm BAE Systems has sold £15 billion in arms to Saudi Arabia since 2015. The UK Court of Appeal declared arms sales to Saudi Arabia unlawful in June 2019, prompting the government to announce a suspension of the sales as it conducted a review. However, the government has approved new arms export licenses to Saudi Arabia on at least four occasions since the ruling.⁸⁰

Russia

Russia has shown renewed interest in the Red Sea region in recent years, primarily for security purposes, and a willingness to abet authoritarianism, as it has in other regions. Russia has no major trading partners in the Red Sea region except for Egypt, which has signed an agreement with Russia to build a nuclear power plant on the Mediterranean coast. Russia focuses its engagement in those areas where it has a competitive advantage, such as in the nuclear power sector (it also has agreements to build power plants in Ethiopia, Sudan, and Kenya), the mining and oil sectors, and conventional arms, which it sells to numerous African countries. Russia holds regular military exercises with Egypt and reportedly has an agreement to use Egypt’s bases and airspace. The private mercenary Wagner Group, which has close ties to the Kremlin, is active in Africa, having trained forces in Sudan. Moscow’s security ties with the Gulf states are also growing as Saudi Arabia and the UAE consider purchasing the S-400 anti-aircraft system. Russia has sought to establish a naval base along the Red Sea coast—plans that may already be underway. In 2018, the Russian and Eritrean foreign ministers announced an agreement for what they referred to



Ethiopian prime minister Abiy Ahmed, top center, looks on as Egyptian president Abdel Fattah al-Sisi, bottom left, and Russian president Vladimir Putin, bottom right, arrive to pose for a photo with other leaders of African countries at the Russia-Africa summit in Sochi, Russia, on October 24, 2019. (Photo by Sergei Chirikov/AP)

as a Russian logistics center, but no further reports on the arrangement have been released. Russia and Sudan signed a draft military agreement in March 2019 that may have involved a fleet logistics center that Sudan had reportedly offered the previous year. The subsequent change of government in Sudan raises questions about the status of any arrangement, however.

During the first Russia-Africa summit in Sochi in October 2019, hype about Russia's post-Cold War return to Africa was considerable. Some skepticism is justified, however, because Russia's financial resources are limited. Most important, President Vladimir Putin will likely remain preoccupied with more pressing international issues and intermittent domestic unrest for the foreseeable future. It is perhaps not surprising then that Russian follow-up from the Sochi summit has been minimal.

Japan

Japan's main interest in the Red Sea is free passage for commercial vessels. In 2018, 134 Japanese-flagged vessels transited the Suez Canal; their net tonnage was well over twice

that of the Chinese-flagged vessels making that transit. In 2011, Japan opened its first overseas military base in Djibouti, which hosts about two hundred personnel as well as maritime patrol aircraft that engage in antipiracy missions. Japan has also used the base to support its UN peacekeeping contingent in South Sudan. Japan and India are discussing an Indo-Pacific military logistics agreement that would grant India access to Japan's base in Djibouti and Japan access to India's base on the Andaman and Nicobar Islands off the western coast of the Malay Peninsula. Separately, Japan and India launched the Asia-Africa Growth Corridor, an initiative to boost trade with Africa, in 2017.

India

Fearful of Chinese encirclement, India has long-term aspirations of attaining naval predominance in the Indian Ocean. It is also concerned about passage through the Red Sea for commercial reasons. India joined the Gulf of Aden antipiracy operation in 2008 as an independent participant and has contributed troops to the UN peacekeeping mission in South Sudan. India's relations with the GCC countries include defense and naval cooperation, joint exercises, and regular Indian ship visits. In addition to developing closer military ties with Japan, India has concluded agreements with the United States and France for access to their Indian Ocean bases and has engaged in joint exercises with both countries. It is trying to negotiate an agreement with the Seychelles to construct military facilities and has an agreement for the Indian Navy to receive logistical support at the Omani port of Duqm.

India's economic ties with the Horn of Africa have grown as India's economy has taken off over the past two decades. Indian trade with the region has increased significantly, from a total volume of \$550 million in 2001 to nearly \$5.4 billion in 2017. Indian trade with Egypt likewise increased, growing from \$584 million to almost \$3.4 billion in the same period.⁸¹ India's foreign direct investment in Kenya, Ethiopia, and Sudan between 2008 and 2016 totaled \$337 million, primarily in the manufacturing sectors in Kenya and Ethiopia and in the oil and gas sector in Sudan. By comparison, Indian FDI in Egypt in the same period amounted to \$603 million, primarily in the oil and gas, solar, and pharmaceuticals sectors.⁸²

Iran

Iran's support to the Houthis in Yemen demonstrates its ability to be a spoiler in the Red Sea at relatively low cost. Iran periodically sends naval forces to the Red Sea in the name of counterpiracy and sent a flotilla to Syria through the Suez in 2011. Commercial transit through the Red Sea holds some importance for Iran because the country has modest trade with Europe. Iran today is on its back feet in the Red Sea thanks to Saudi and Emirati efforts, but it once had important friends in the area, such as Sudan. In this constantly changing part of the world, Iran may once again become a significant player as others lose interest or make policy mistakes.

US Leverage Points

US security, humanitarian, and development investments in the Red Sea region dwarf those of any other actor.

Security Investments

The United States has maintained a significant military footprint in the Red Sea region for several decades. In the Horn of Africa, its military presence has grown markedly since the terrorist attacks of September 11, 2001, largely out of a concern for violent extremist groups based in Somalia. Its footprint in the Arab Red Sea littoral states of Egypt, Saudi Arabia, and Yemen as well as in the adjacent Persian Gulf has fluctuated in this period based on the intensity of US engagement in Iraq and Afghanistan. Nevertheless, US naval power in the wider Indian Ocean has consistently been greater than that of any other country.⁸³

In 2000, the United States had only a little more than two hundred troops deployed in sub-Saharan Africa, several dozen in Ethiopia and Kenya, and a handful in several other East African nations. In 2002, Washington created the Combined Joint Task Force-Horn of Africa (CJTF-HOA) to support counterterrorism operations in the region. The Defense Department chose the newly acquired Camp Lemonnier in Djibouti, to date the only permanent US base in Africa, as task force headquarters. In 2010, three years after US Africa Command was created, the US military had approximately two thousand soldiers in East Africa, mostly in Djibouti with CJTF-HOA.⁸⁴ AFRICOM's presence in the Horn grew in the late 2010s as it became more engaged in kinetic operations against violent extremists in Somalia. As of early 2020, up to 4,400 US soldiers were stationed in East Africa, primarily in Djibouti. Somalia and Kenya combined host roughly a thousand troops.⁸⁵ (See box 3 for a discussion of other countries' troop deployments in the region.)

The US military presence in Saudi Arabia has decreased since 2000, when it was significant as a holdover of the 1990–91 Gulf War. By the late 2010s, the United States maintained only a few hundred troops in Saudi Arabia.⁸⁶ This changed in October 2019 when the United States announced new deployments to the kingdom of three thousand soldiers along with fighter squadrons and missile defense systems following an attack on Saudi oilfields blamed on Iran.⁸⁷ The deployments were temporary, however, and the United States began pulling back some aircraft and Patriot missile systems in May 2020 amid disagreements between Washington and Riyadh over global oil prices.⁸⁸ In Egypt, meanwhile, the United States has maintained anywhere between five hundred and a little more than a thousand troops at any given time over the past two decades. Most have been part of the Multinational Force and Observers peacekeeping mission in the Sinai Peninsula.⁸⁹



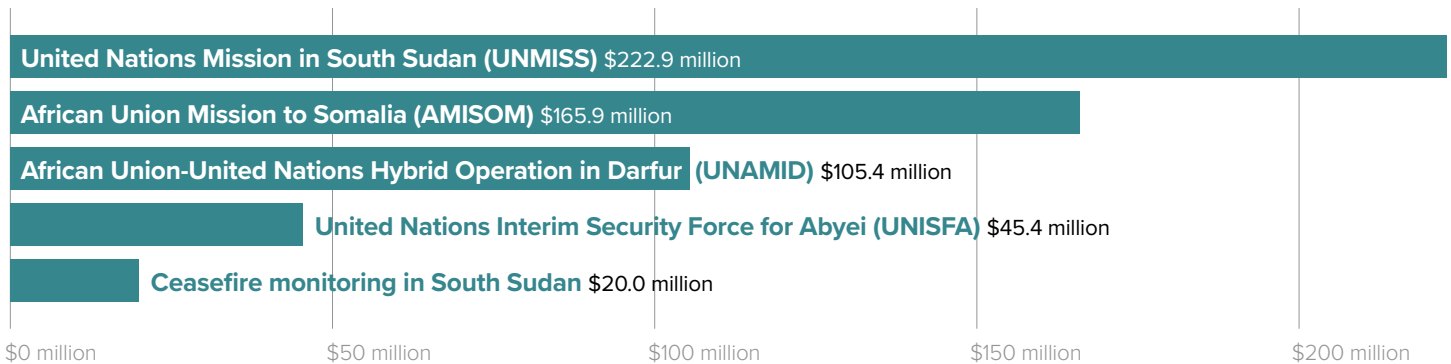
President Trump meets with President Abdel Fattah al-Sisi, center, of Egypt at the Oval Office on April 3, 2017. (Photo by Stephen Crowley/New York Times)

The US presence in the Persian Gulf, meanwhile, increased significantly in the first decade of the 2000s because of the wars in Iraq and Afghanistan. Although the presence has since decreased somewhat, approximately thirty-five thousand forces are stationed across Bahrain, Kuwait, Oman, Qatar, and the UAE.⁹⁰

In terms of security assistance to the Red Sea region, Egypt receives the lion's share. For FY2020, the Department of State requested \$1.3 billion in foreign military financing (grants to purchase US military equipment) for the nation, which has received more than \$1 billion annually since 1983.⁹¹ Although the states in the Horn receive less security assistance, what they receive is nonetheless significant. From FY2017 through FY2019, the United States spent more than \$1.25 billion across the region (not including support for UN peacekeeping missions) primarily to support the African Union Mission in Somalia (AMISOM) battling al-Shabaab as well as related counterterrorism programs.⁹² Although the Trump administration somewhat reduced the scale of assistance in its FY2020 budget request, bilateral assistance has always varied from year to year. Kenya, for example, received \$129.1 million in Section 333 funding (primarily for helicopter purchases) in 2016, \$15 million in 2017, \$69.1 million in 2018, but only

FIGURE 3

US Peacekeeping Contributions to the Horn of Africa, FY2020 Request



Source: US Department of State, “Fiscal Year 2020 Congressional Budget Justification”; Luisa Blanchfield, Alexis Arieff, and Lauren Ploch Blanchard, “U.N. Peacekeeping Operations in Africa,” CRS report no. R45930, September 23, 2019.

Notes: AMISOM is not a UN-operated blue helmet mission, but part of the US funding for Somalia goes to the UN Support Office in Somalia (UNSOS) that supports AMISOM and Somali security forces. This 2020 funding request is broken down into \$75.9 million for UNSOS, which includes support for the Somali National Army, as well as \$90 million in direct support for AMISOM. In addition, both Somalia and the six AMISOM troop contributing countries receive separate, smaller amounts of bilateral security assistance each year. The South Sudan figure includes support to the Joint Monitoring and Evaluation Commission that oversees the implementation of the 2018 Revitalized Agreement on the Resolution of the Conflict in South Sudan as well as the Ceasefire Transitional Security Arrangements Monitoring and Verification Mechanism that monitors and verifies the 2014 Cessation of Hostilities Agreement.

\$5 million in 2019. A multiyear snapshot therefore indicates substantial, ongoing US commitments. In addition, the United States is the largest single donor to UN peacekeeping operations globally, and the Horn of Africa has more UN peacekeeping missions (and peacekeepers) than any other region of the world. In 2020, the administration requested \$374 million to support UN peacekeeping missions in the Horn (see figure 3).⁹³

Although the Gulf states receive virtually no US security assistance per se, they are some of the largest purchasers of US military equipment in the world. Between 2013 and 2017, Saudi Arabia imported the overwhelming majority of its arms from the United States and EU member states.⁹⁴ The UAE has sought to purchase US-made F-35 aircraft, top-of-the-line fighters that have no equivalent on the market. (France is another major source of high-end military aircraft for the Gulf states.)

Although Russia and China are a growing presence in the Middle Eastern arms market, the Gulf states cannot afford to end their security relationship with the United States in the immediate future. Saudi Arabia is effectively locked into US and European systems for high-end assets such as combat aircraft and air defense platforms. Even if Saudi Arabia decided to purchase such systems from China and Russia—and consensus remains that US systems are technologically superior, at least for now—it would need to adopt an expensive, gradual approach to retrain its personnel, acquire spare parts, adopt new operating procedures, and so on—a process that would likely take years rather than months. For example, the vast majority of Saudi aircraft operating in Yemen are produced by the United States or other NATO countries; likewise, much of the Saudi armor

BOX 3

Other States' Military Commitments

Despite the increasing militarization of the Red Sea arena, no non-African nation yet comes close to matching the US troop presence in the Horn of Africa. China's base in Djibouti is currently home to between one thousand and two thousand troops, though it has the capacity to host roughly ten thousand.^a France has 1,450 troops in Djibouti, its former colony. Japan has a small facility in the country housing approximately 180 troops. Italy also has eighty troops in a small base near Djibouti's main airport. Germany and Spain both maintain contingents at the French base of thirty to eighty and fifty troops, respectively.^b No Saudi troops are known to be in Djibouti at this time despite tentative plans for a base.

Turkey has two hundred troops at its base and military academy in Mogadishu. The EU Training Mission in Somalia, primarily based in Mogadishu, has a strength of roughly two hundred troops from eight countries. The United Kingdom has eighty-five troops stationed at two training centers across Somalia, and its only established base in Africa is in Nanyuki in central Kenya. Housing a permanent contingent of four

hundred troops, the base hosts up to ten thousand British soldiers for training exercises throughout a given year.^c

Although the UAE is less transparent about its military footprint, the Emirati presence in the Red Sea appears to have decreased somewhat over the past two years. The UAE training force in southern Somalia was expelled in 2018. Meanwhile, the status of a UAE base in Berbera, Somaliland—originally set to open in 2019—is uncertain.^d Over the course of 2019, the UAE reduced its presence in Yemen from a few thousand to a few hundred troops; it likely maintains a presence on the Yemeni island of Socotra, where it had taken control of the airport and seaport in 2018.^e As of early 2019, the Emirati base in Assab, Eritrea, reportedly hosted a battalion of ground forces in addition to eight hundred to twelve hundred naval, air, and support forces. This presence has reportedly decreased by up to 75 percent, although the UAE has, according to UN investigators, continued to use the air base to covertly ferry arms to the LNA in Libya.^f

Notes

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and artillery positioned along its southern border is Western made. The Saudis rely on Western munitions, spare parts, communications equipment, and logistics and maintenance support from NATO militaries to keep these systems in operation. If Washington, London, and Paris were to cut off this support entirely, most Saudi military operations in Yemen would likely abruptly cease.⁹⁵

The Gulf states are already aware that they cannot take Washington's support for granted. Bipartisan concern in Congress has been mounting in recent years over the Saudi-led coalition's failure to adhere to international law and the law of armed conflict in Yemen. This evolved into more vocal criticism following the murder of Jamal Khashoggi in October 2018, after which prominent members of Congress called for a reevaluation of the US-Saudi relationship. The United States ended air-to-air refueling of coalition aircraft a month after Khashoggi's murder, though the decision was not explicitly linked to the incident.⁹⁶ The Trump administration has been more supportive of the coalition, however, leading to a legislative showdown in April 2019: that month, the administration vetoed a resolution aimed at ending all US military involvement in the Yemen conflict on the grounds that the United States was not actually a party to the hostilities. The co-sponsors of the Senate bill failed to garner enough votes to override the veto.

In 2019, the Trump administration requested more than \$10 billion in emergency arms sales to Saudi Arabia and the UAE. Although Congress attempted to block these requests out of concern over the Saudi-led coalition's operations in Yemen, the president vetoed the bill and the sales proceeded.⁹⁷ As of December 2019, roughly a third of the munitions related to these sales had been delivered. Then, in January 2020, the administration informally notified Congress that it planned to sell an additional \$478 million in precision-guided missiles to Saudi Arabia.⁹⁸

Humanitarian, Development, and Private-Sector Investments

The United States is consistently the lead humanitarian donor in the Red Sea region. In the 2019 fiscal year, USAID delivered more than \$2.1 billion in humanitarian assistance to the Horn of Africa, primarily to conflict and natural disaster hot spots such as Somalia, South Sudan, Ethiopia, and Sudan. It also delivered \$746 million in humanitarian assistance in 2019 to address the conflict in Yemen, making it the second-largest individual donor in that response after Saudi Arabia. As a point of comparison, the United States provided \$493 million in humanitarian aid to Ethiopia in FY2019 to China's \$7 million.⁹⁹

The United States is the largest single country donor to COVID-19 global response efforts, committing more than \$775 million in emergency health, humanitarian, and economic assistance as of May 1, which includes significant assistance to the Red Sea region. Washington has committed approximately \$88 million to the Horn of Africa and another \$1.7 million to Yemen in emergency COVID-19 response assistance. Sudan has received the largest assistance commitment of any country in the region (\$23.1 million), followed by Ethiopia (\$20.5 million), South Sudan (\$19 million), and Somalia (\$16.5 million).¹⁰⁰

The United States has also been a major source of economic development assistance to the region. The Department of State requested close to \$1.1 billion in development assistance—much of it earmarked for public health programs—for East Africa for the 2020 fiscal year and another \$110 million for Egypt and Yemen combined.¹⁰¹

The United States has increased its development assistance to Sudan during the democratic transition. USAID announced at a June 2020 donors' conference that it is providing \$60 million in development assistance and \$275 million in humanitarian assistance in 2020. Although this is a notable increase in development assistance in recent years, it falls well short of what the United States committed at an equally historic period following the signing of the Comprehensive Peace Agreement in 2005—\$1.7 billion—as well as what other countries in the region receive: USAID requested \$415 million in development assistance to Uganda for 2020, for example.¹⁰² Ethiopia is looking to the United States and international financial institutions to alleviate its macroeconomic woes, principally foreign exchange scarcity, which the United States and its partners have already begun to address with a \$2.9 billion dollar IMF package and planned US investments of up to \$5 billion in Ethiopia. However, the imperative of economic relief is all the higher now in light of the COVID-19 pandemic. If Washington does not increase its commitments to Sudan and Ethiopia, the countries risk becoming reliant on Gulf funds for government bailouts, which is both unpredictable given dramatic plunges in global oil prices and also liable to affect the Ethiopian and Sudanese democratic transitions in adverse ways.

US and European foreign investment also give the United States and its partners more leverage in the Red Sea region than is often appreciated. China's Belt and Road ambitions in the Middle East have received significant attention of late, and Beijing has consistently been the largest investor in parts of East Africa, notably Ethiopia, in recent years. However, China is still a relatively new investor in the Middle East and Africa, and the comparative advantages of US and European investment are significant. Across the Middle East and North Africa, the United States, the United Kingdom, and EU tend to spend more, create more jobs, and invest more consistently than China. Similarly, an increase in US and European investment in Ethiopia between 2016 and 2019 resulted in notable job growth in the country. The data suggest that through sustained investment, the United States and its partners could effectively compete with China even in places, like Ethiopia, where Beijing may appear to be the entrenched partner of choice.¹⁰³

The prospect of new trade arrangements with Horn states may also extend US influence. In February 2020, the US and Kenyan governments announced the start of discussions over a landmark bilateral free trade agreement (FTA), which would be the first bilateral US FTA in sub-Saharan Africa. A successful FTA with Kenya could induce other East African countries to pursue similar negotiations with the United States, which in turn could place political as well as economic conditions on such agreements.

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**FINAL REPORT AND
RECOMMENDATIONS OF THE**

**Senior Study Group on
Peace and Security in
the Red Sea Arena**

Geopolitical and geo-economic dynamics in the Horn of Africa have in recent years become tied to the Middle East and broader Indian Ocean in a way unprecedented in the twentieth century. US strategy, however, has struggled to keep pace with developments and to account for the region's increased relevance to US interests. This report considers the factors that have reshaped the Red Sea region and defines US interests within a hierarchy of priorities to assist policymakers and to provide recommendations for defending and advancing those interests. The most critical challenges will require multilateral responses bolstered by appropriate, region-led, multilateral architectures, but only US leadership can ensure that effective solutions are brought to bear in responding to shared political, economic, and security threats.

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