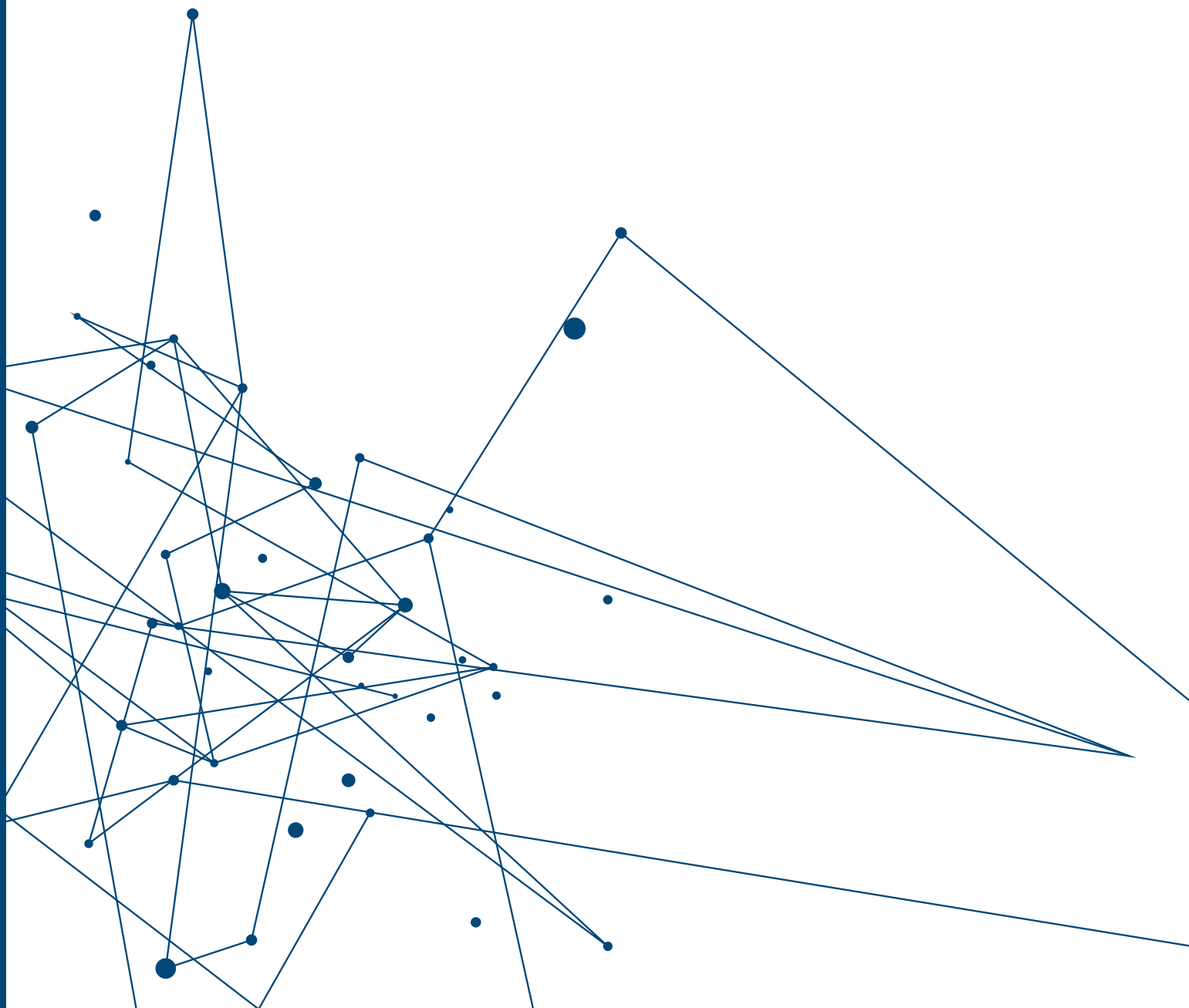
CATS Centre for Applied Turkey Studies NETWORK

CATS NETWORK PAPER | NO. 27 | 16.12.2025

The New Rules of the Game in the Horn of Africa

Hedging, Rivalry, and Partnership between Turkey, Egypt, and Ethiopia



The strategic landscape of the Horn of Africa has shifted from ideological confrontation to competitive cooperation, with Turkey, Egypt, and Ethiopia recalibrating their positions amid intensifying global rivalries. As Ankara shifts from episodic engagement to structural presence, combining infrastructure investment, security partnerships, and crisis mediation, it has become a pivotal actor in the Horn of Africa. Egypt, long wary of Turkey's growing footprint, now balances guarded engagement with persistent strategic anxieties, while Ethiopia views Turkey as a key partner for its industrialisation, the modernisation of its military, and its quest for maritime access. This analysis unpacks how these evolving relationships are reshaping regional power dynamics and what this volatile equilibrium means for a Europe increasingly confronted with diminishing influence yet rising strategic exposure in the Red Sea corridor.

This paper is part of a series of six CATS Network Papers assessing Turkey's engagement with Africa from the perspectives of Germany, France, Italy and Spain, complemented by analyses from Turkey itself and two major actors on the continent, Egypt and Ethiopia.

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1.

Introduction

Over the past two decades, Turkey has steadily expanded its footprint in the Horn of Africa, which is a region of critical geopolitical significance due to its proximity to the trade routes and hubs of the Red Sea.[1] An initially episodic engagement has evolved into a structural presence: Turkish firms have delivered flagship infrastructure projects,[2] expanded into ports, airports,[3] and textiles,[4] and even entered the energy and finance sectors, with oil exploration off Somalia[5] and *Ziraat Katılım*'s banking operations in Somalia and Sudan.[6] At the same time, Ankara has entrenched itself as a security actor, establishing a military training base in Somalia and supplying arms and training to Ethiopia, Djibouti, and Somalia.

Turkey's growing role has elicited sharply diverging reactions from the two regional heavyweights. Egypt and Ethiopia are both pivotal in the Horn and the wider African continent, but frame Turkey's activism through different lenses. Egypt, on the north edge of the Red Sea, often perceives Turkey's Horn of Africa strategy through a lens of rivalry and encirclement, while Ethiopia, in the Horn itself, sees Turkey as a valuable development and security partner.

Today, this triangular dynamic is in flux. Egypt, which had long focused on countering Turkey, has begun cautiously testing engagement, even as it seeks to hedge through

[1] Nebahat Tanrıverdi Yaşar, "Turkey", in *Anatomy of a Chokepoint: Mapping Power and Conflict in the Red Sea* (European Council on Foreign Relations [ECFR], May 2025), https://ecfr.eu/special/anatomy-of-a-chokepoint-mapping-power-and-conflict-in-the-red-sea/ (accessed 06 October 2025).

[2] Nardos Yoseph, "Railway Corp Steps Closer to Resuming Messy Awash-Hara Gebeya Project", *The Reporter* (online), 23 August 2025, https://www.thereporterethiopia.com/46575/ (accessed 06 October 2025).

[3] Albayrak, *About Us*, https://www.albayrak.com.tr/en/about-us/;
Summa, *Projects*, https://www.summa.com.tr/en/projects.htm (accessed 06 October 2025);
Alfie Shaw, "Turkey Signs Agreement for Oil Exploration in Somalia", *Offshore Technology* (online), 19 July 2024, https://www.offshore-technology.com/news/turkey-to-explore-oil-fields-in-somalia/ (accessed 06 October 2025).

[4] Addis Ababa and Tufan Aktaş, "Türk Yatırımcı Etiyopya'da 7 Bin Kişiye İstihdam Sağlıyor", *Anadolu Agency (AA)* (online), 29 September 2017, https://www.aa.com.tr/tr/ekonomi/turk-yatirimci-etiyopya-da-7-bin-kisiye-istihdam-sagliyor/922544 (accessed 06 October 2025).

[5] Türkiye in Somalia (@TC_MogadisuBE), "We hosted the signing ceremony for a joint venture agreement between a Turkish and Somali company. The agreement aims to build a Biogas power plant in Mogadishu. By the end of 2024, the plant will have a production capacity of 5.6 MW/hour, providing energy to around 40,000 homes.", *X*, 22 August 2023, https://x.com/TC_MogadisuBE/status/1694050979291832592 (accessed 06 October 2025).

[6] Ziraat Bank, *Ziraat Bank's Subsidiaries*, https://www.ziraatbank.com.tr/SitePages/InteraktifRaporlar/2023/en/m-4-3.html (accessed 06 October 2025).

alternative partnerships with Gulf states such as the United Arab Emirates (UAE) and Saudi Arabia. Ethiopia, emerging from civil war, continues to value Turkish investment and security support but now faces a more complex situation: Addis Ababa must navigate Ankara's rapprochement with Cairo and Egypt's growing partnership with Mogadishu, at a time when it is strategically dependent on the UAE – making any shift in its external alignments particularly delicate. Turkey itself has also recalibrated its approach. It has been now moving beyond rigid friend/foe binaries toward a more pragmatic and adaptive posture, shifting between mediation, security cooperation, and tactical power-brokering as regional dynamics evolve. These dynamics unfold in a crowded arena where global competition is intensifying: while China has entrenched itself with Belt and Road infrastructure and a base in Djibouti, Russia seeks access to the Red Sea and forges resource-linked networks,[7] but the United States remains the dominant military actor, providing the core infrastructure, intelligence, and operational leadership for counterterrorism missions in the region.

Against this backdrop, the EU finds itself playing for high stakes with diminished leverage. Whole the Horn is a crucial arena for maritime security, migration, and energy transport, Europe's presence is limited. The interplay between Turkey, Egypt and Ethiopia is consequently of direct import for Europe, as it is reshaping the Horn's balance of power in ways that both dilute EU's influence and create limited but tangible opportunities for engagement in mediation, connectivity, and climate cooperation. As a result, understanding how Egypt and Ethiopia are repositioning vis-à-vis Turkey is central to designing an effective European response in a more multipolar Horn. The aim of this policy analysis is to understand how Egypt and Ethiopia have received and reacted to Turkey's expanding role in the Horn, how this is influencing their policies, and what this triangular interplay means for Europe as it navigates an increasingly multipolar regional landscape.

[7] Catrina Doxsee, *How Does the Conflict in Sudan Affect Russia and the Wagner Group?* (Washington D.C.: Center for Strategic & International Studies [CSIS], 20 April 2023), https://www.csis.org/analysis/how-does-conflict-sudan-affect-russia-and-wagner-group (accessed 06 October 2025).

2.

Egypt's Balancing Act with Turkey in the Horn: From Conflictual to Guarded Engagement

2.1 Egypt's Security Perspective on Turkey's Role in the Horn of Africa

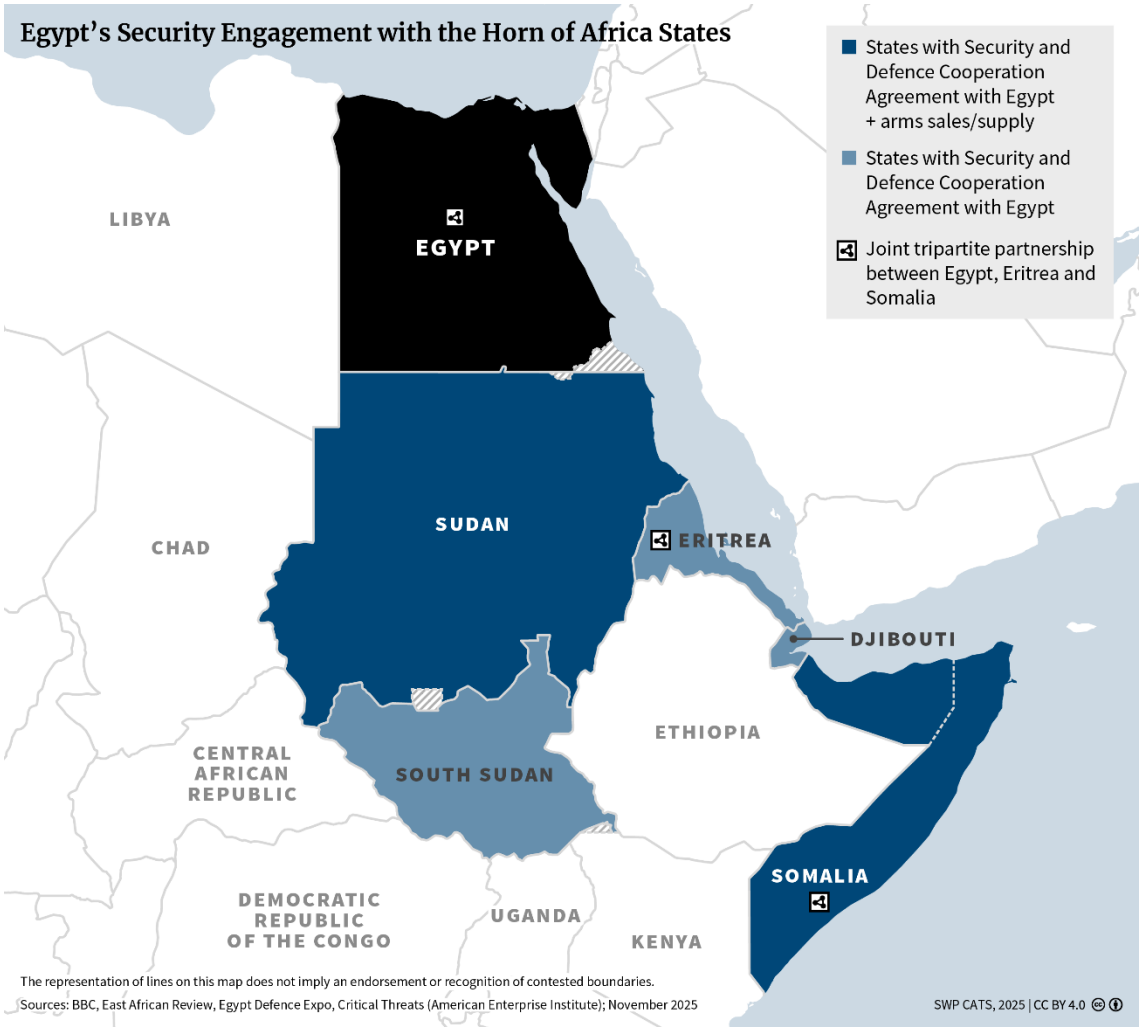
For much of the past decade, Egypt has viewed Turkey's expanding role in the Horn of Africa primarily through a security lens. In Cairo's eyes, Ankara's ideological stance, military basing, arms transfers, and economic engagement represented interlinked instruments that threatened the regime's stability, Nile security, and regional influence. Turkey's support for the Muslim Brotherhood, its alignment with Qatar, and its rejection of Egypt's post-2013 political order were seen as direct challenges to the security of the Egyptian regime. Turkey's military involvement in the region – most visibly the *TURKSOM* base in Somalia and negotiations over Suakin island of Sudan – was interpreted as an attempt to project power in the Red Sea, prompting Cairo to deepen ties with Eritrea and South Sudan. Cairo framed Turkey as a multidimensional strategic threat that required counterbalancing.

These tensions had intensified, when Middle Eastern rivalries spread to the Horn of Africa. The blockade of Qatar in 2017 by Saudi Arabia, the UAE, Bahrain and Egypt crystallized the divide, with Turkey and Qatar backing Islamist actors[8] while Saudi Arabia, the UAE, and Egypt worked to suppress them. In Somalia, Turkey and Qatar supported the Mogadishu government, while the UAE cultivated breakaway entities

[8] Jason Mosley, *Turkey and the Gulf States in the Horn of Africa: Fluctuating Dynamics of Engagement, Investment and Influence* (Nairobi :Rift Valley Institute, 2021), https://riftvalley.net/wp-content/uploads/2021/05/RVI-2021.05.28-Turkey-Gulf-States-in-HoA-.pdf (accessed 06 October 2025).

like Somaliland and Puntland. Ankara's attempt to secure military access to Sudan and deepen economic ties faltered after Bashir's ouster, paving the way for Cairo, Riyadh, and Abu Dhabi to expand their influence at Turkey's expense.[9] These dynamics reinforced Cairo's view of the Horn as another arena of defensive competition with Ankara and its allies.

Figure 1



Another major security concern for Egypt has been Turkey's role as an arms supplier in the Horn – particularly to Ethiopia, with which Egypt has a long-standing dispute over Nile water rights. During Ethiopia's Tigray conflict (2020–2022), Ankara supplied Addis Ababa with advanced Bayraktar TB2 drones and other weaponry.[10] Historically speaking, air superiority has been one of Egypt's few pressure points

[9] Mohammed Amin, "Suakin: 'Forgotten' Sudanese Island Becomes Focus for Red Sea Rivalries", *Middle East Eye* (online), 19 March 2018, https://www.middleeasteye.net/news/suakin-forgotten-sudanese-island-becomes-focus-red-sea-rivalries (accessed 06 October 2025).

[10] "Türkiye in the Horn of Africa: A Balancing Act between Ambition and Responsibility", *Yabele Media* (online), 07 January 2025, https://yabelemedia.com/2025/01/07/7414/ (accessed 06 October 2025).

against Ethiopia. Cairo sees Turkish arms transfers bolstering Ethiopia's military capabilities in ways that could constrain its own options in the longer term and strengthening Addis Ababa's negotiating position in the Nile dispute.[11]

Those tensions resonate with Egypt's own structural vulnerabilities. For Cairo, the Horn is less an arena of economic opportunity than a strategic buffer whose instability could spill into the Red Sea, the Nile basin, and Egyptian domestic politics. Two interlinked concerns drive this perception. First, stability of the Red Sea corridor is vital for the security of the Suez Canal, a critical economic lifeline for Egypt. It generates hard currency that is vital for Egypt's fiscal stability, debt servicing, and essential imports. Disruptions – whether piracy, the Yemen war, the stranding of the container ship *Ever Given* or the recent Houthi attacks – have immediate consequences.[12] The Suez Canal also makes Egypt a regional gatekeeper between Europe and Asia, providing diplomatic leverage with Europe and other global powers. Second, the Nile remains Egypt's core security concern, as its dependence on the river for water and food makes any upstream developments directly existential. Ethiopia's unilateral launch of the Grand Ethiopian Renaissance Dam (GERD) in 2011, followed by contentious negotiations and unilateral filling of the reservoir, entrenched Egyptian fears over water scarcity and food security. Together, these vulnerabilities cemented Egypt's view of the Horn and its maritime approaches as both a strategic frontier and a crucial economic lifeline.

Egypt views Turkey's economic engagement has through the same geopolitical lens. Ankara's growing investments in Ethiopia and its deep commercial ties to Somalia and Sudan, are seen as strengthening governments that are often at odds with Cairo. Turkey has become Somalia's largest external investor, and its commercial presence has expanded rapidly: bilateral trade rose from USD 6 million in 2010[13] to nearly USD 280 million in 2020.[14] With Sudan, trade reached around USD 650 million in 2017, before the 2019 political upheaval.[15] A more self-sufficient Ethiopia, backed by

[11] Darek Liam, "U.S., Egypt Concerned over Turkey's Bayraktar TB2 Sales to Ethiopia", *Military Africa* (online), 23 December 2021, https://www.military.africa/2021/12/u-s-egypt-concerned-over-turkeys-bayraktar-tb2-sales-to-ethiopia/#google_vignette (accessed 06 October 2025).

[12] Noam Raydan and Farzin Nadimi, *Houthi Shipping Attacks: Patterns and Expectations for 2025* (Washington D.C.: The Washington Institute for Near East Policy, 16 December 2024), https://www.washingtoninstitute.org/policy-analysis/houthi-shipping-attacks-patterns-and-expectations-2025 (accessed 06 October 2025);
"Ever Given: The Grounding That Changed the World's View of Shipping", *Safety4Sea* (online), 28 March 2023, https://safety4sea.com/cm-ever-given-the-grounding-that-changed-the-worlds-view-of-shipping/ (accessed 06 October 2025).

[13] Hakan Aydın, "Terörün gölgesinde Türkiye-Somali ilişkileri" [Turkey-Somalia relations in the shadow of terrorism], *Anadolu Agency (AA)* (online), 22 January 2020, https://www.aa.com.tr/tr/analiz/terorun-golgesinde-turkiye-somali-iliskileri/1710149 (accessed 06 October 2025).

[14] Türkiye Ministry of Foreign Affairs, *Relations between Turkey and Somalia*, https://www.mfa.gov.tr/relations-between-turkey-and-somalia.en.mfa (accessed 06 October 2025).

[15] Ali Küçükgöçmen and Khalid Abdelaziz, "Turkey to Restore Sudanese Red Sea Port and Build Naval Dock", *Reuters* (online), 26 December 2017, https://www.reuters.com/article/us-turkey-sudan-port-idUSKBN1EK0ZC/ (accessed 06 October 2025).

Turkish and Chinese capital, is perceived as less susceptible to Egyptian leverage over Nile water rights.[16] Egypt sees Turkey's economic engagement extending beyond commerce. Unlike China's large-scale infrastructure projects, which Cairo views as benign, Ankara's aid, investment, and trade are often seen as instruments of political influence in the Horn. As one former Egyptian deputy foreign minister said, "Turkish moves undermine Arab and Egyptian influence wherever they occur."[17] This perception underscores Cairo reason for wariness: it sees Turkey's presence in the Horn as part of a broader bid for regional leadership, which could ultimately play out to Egypt's disadvantage.

Despite these concerns, Egypt adopted a cautious posture in the Horn throughout the 2010s – in contrast to Turkey's activism. Cairo's overriding priorities were securing the regime at home, especially after 2013, and exerting influence over Nile diplomacy vis-à-vis Ethiopia's upstream ambitions. Much of its diplomatic bandwidth during this period was absorbed by the Eastern Mediterranean disputes and the Libyan conflict. While it regarded fragile Somalia and Sudan as vulnerable to Islamist currents, it lacked the resources and focus to compete with Turkey and Qatar on its own. These limitations reinforced Cairo's reliance on its Gulf allies to counterbalance Turkey and Qatar in the Horn of Africa. Cairo tacitly welcomes Emirati and Saudi investments in Sudan, Djibouti and Somalia (in port infrastructure, banking, and agriculture) as a means of diluting Ankara's influence. For example, Emirati investments in the Somaliland port of Berbera[18] and financial assistance to Ethiopia[19] have been interpreted as offsetting Turkey's influence in the two arenas where Egyptian interests are most sensitive.

[16] Mostafa Nasr, "How Turkish Diplomacy in the Horn of Africa Challenges Egypt's Ambitions", *The New Arab* (online), 31 December 2024, https://www.newarab.com/analysis/how-turkeys-diplomacy-horn-africa-challenges-egypt (accessed 06 October 2025).

[17] Ibid.

[18] "UAE to Fund $3 Billion Berbera-Ethiopia Railway in Strategic Horn of Africa Play", *Saxafi Media* (online), 26 June 2025, https://saxafimedia.com/uae-3-billion-berbera-ethiopia-railway-horn/ (accessed 06 October 2025).

[19] Micheale Kihishen Gebru, *The United Arab Emirates' Engagement in Ethiopia: Implications for the Horn of Africa's Geopolitical and Security Landscapes*, Policy Brief 35 (Berlin: Megatrends Afrika, Stiftung Wissenschaft und Politik [SWP], March 2025), https://www.swp-berlin.org/assets/afrika/publications/policybrief/MTA-PB35_UAE_Engagement_in_Ethiopia_Gebru.pdf (accessed 06 October 2025).

2.2
New Modus Operandi: Guarded Engagement

The 2021–2023 thaw between Turkey and Egypt marked a turning point, a tempering of Egypt's rigid zero-sum approach. The two countries restored diplomatic relations in 2023.[20] Turkish investments in Egypt have expanded, and both sides have signalled readiness to coordinate on regional disputes in the Horn.[21] Two regional developments accelerated Cairo's recalibration. First, the Entebbe Agreement, which came into effect in 2024, limits Egypt's scope to contest upstream states' demands for greater water shares, thereby diluting its historical veto posture and pushing it toward searching for new security and defence partnerships.[22] Second, the UAE's shifting posture – supporting Ethiopia's Red Sea ambitions, backing Sudan's Rapid Support Forces, and building closer ties with Addis Ababa – was perceived as a direct threat[23]. The fallout from Sudan's war, including the arrival of over 1.2 million refugees in Egypt since 2023, deepened this sense of strategic vulnerability.[24]

Against this backdrop, limited accommodation with Turkey emerged as a pragmatic adjustment.[25] Erdoğan's visit to Cairo in February 2024 and Sisi's return visit to Ankara in September produced agreements encompassing defence, energy and trade[26]. For Egypt, Turkey now serves both as a counterweight to Emirati ambitions in

[20] "Turkey and Egypt Appoint Ambassadors to Restore Diplomatic Ties", *Al Jazeera* (online), 04 July 2023, https://www.aljazeera.com/news/2023/7/4/turkey-and-egypt-appoint-ambassadors-to-restore-diplomatic-ties (accessed 06 October 2025).

[21] Umut Uras, "Egypt, Türkiye Discuss Boosting Bilateral Trade to $7bn", *Daily News Egypt* (online), 01 September 2025, https://www.dailynewsegypt.com/2025/09/01/egypt-turkiye-discuss-boosting-bilateral-trade-to-7bn/ (accessed 06 October 2025).

[22] Ambassador Mona Omar, former Assistant Egyptian Foreign Minister for African Affairs, was quoted as saying: "Egypt has reached the end of the road [...]. We have tried for 13 years to reach a cooperative agreement, and now we have no other options.", see Ahmed Dahaby, "Egypt's Anti-Ethiopia Alliance Takes Shape in the Horn of Africa", *The New Arab* (online), 30 October 2024, https://www.newarab.com/analysis/egypts-anti-ethiopia-alliance-takes-shape-horn-africa (accessed 06 October 2025).

[23] Mahder Nesibu, "Ethiopia–UAE Relations: Strategic Partnership or Structural Imbalance?", *Horn Review* (online), 08 August 2025, https://hornreview.org/2025/08/08/ethiopia-uae-relations-strategic-partnership-structural-imbalance/ (accessed 06 October 2025).

[24] Devon Cone and Daniel P. Sullivan, *No Model of Refuge: Sudanese Refugees in Egypt* (Washington D.C.: Refugees International, 21 February 2025), https://www.refugeesinternational.org/reports-briefs/no-model-of-refuge-sudanese-refugees-in-egypt/ (accessed 06 October 2025).

[25] Karim Mezran, Valeria Talbot, Mona Sukkarieh, Alia Brahimi, Nebahat Tanrıverdi Yaşar, Federico Donelli and Abderahman Salaheldin, *From rivalry to cooperation: The geopolitical implications of Egypt–Turkey rapprochement* (Washington D.C.: Atlantic Council, 23 January 2025), https://www.atlanticcouncil.org/in-depth-research-reports/report/from-rivalry-to-cooperation-the-geopolitical-implications-of-egypt-turkey-rapprochement/#essays (accessed 15.12.2026).

[26] "Egypt's Sisi to Pay First-Ever Official Visit to Turkey on September 4: Report", *Turkish Minute* (online), 22 August 2024, https://turkishminute.com/2024/08/22/egypts-sisi-to-pay-first-ever-official-visit-to-turkey-on-september-4-report/ (accessed 06 October 2025).

the Horn and as a pragmatic partner with leverage in Somalia and Ethiopia. Yet this rapprochement is driven by strategic necessity rather than renewed trust. Cairo engages Ankara primarily to contain instability and prevent proxy escalation, while seeking to ensure that cooperation does not compromise its core security interests. Egypt's rapprochement with Turkey has thus reshaped but not eliminated its longstanding anxieties.[27] Ankara is no longer viewed exclusively as a rival, but increasingly as a tactical partner in specific regional arenas[28] such as Libya, Sudan and, to a limited extent, the Red Sea.[29] This has given rise to a hybrid approach of guarded engagement: cooperating with Turkey where interests align, but preserving the ability to counterbalance where necessary.

On the ground, guarded engagement has translated into selective coordination. In Somalia, both Egypt and Turkey pledged to support Mogadishu's fight against al-Shabaab and sought to keep their broader strategic competition from translating into a proxy battleground on Somali soil. There are even signs of Egypt seeking mutually beneficial projects – for example, coordinating development assistance in countries like Somalia, where Turkey also maintains strong ties.[30] Cooperation has been more explicit in Sudan, where Turkey and Egypt support the Sudanese Armed Forces against the Emirati-backed Rapid Support Forces. Reports suggest that Cairo facilitated the transfer of Turkish Bayraktar drones to the Sudanese Armed Forces, where they are operated by Sudanese troops trained in Egypt[31] – a de facto triangular partnership rooted in shared suspicion of Abu Dhabi.

Despite these openings, mistrust between Turkey and Egypt persists. Ankara's security ties to Ethiopia, its entrenched presence in Somalia, and its mediation between Ethiopia and Somalia have all complicated Cairo's calculus, touching on Egypt's core anxieties over the Nile and the Red Sea. While the prospect of regional stability is welcomed, closer ties between Mogadishu, Addis Ababa and Ankara have narrowed Egypt's room for manoeuvre and were met with scepticism in diplomatic circles.[32] Cairo remains vigilant and cautious towards any Turkish-backed project with the potential to alter the strategic status quo, such as giving Ethiopia access to the sea

[27] Mostafa Nasr, 2024.

[28] Federico Donelli, *In the Horn of Africa, Turkey and Egypt Unfold a Strategic Alignment – or Potential Rivalry* (Washington D.C.: Atlantic Council, January 2025), https://www.atlanticcouncil.org/in-depth-research-reports/report/in-the-horn-of-africa-turkey-and-egypt-unfold-a-strategic-alignment-or-potential-rivalry/ (accessed 06 October 2025).

[29] "Turkey, Egypt Discuss Africa Situation as Dispute between Ethiopia and Somalia Continues", *The New Arab* (online), 13 November 2024, https://www.newarab.com/news/turkey-egypt-discuss-africa-amid-somalia-ethiopia-dispute (accessed 06 October 2025).

[30] Ibid.

[31] "Report Says Egypt Delivered Turkish Drones to Sudan's Military", *The Arab Weekly (AW)* (online), 15 September 2023, https://thearabweekly.com/report-says-egypt-delivered-turkish-drones-sudans-military (accessed 06 October 2025).

[32] Ambassador Mona Omar, former Assistant Egyptian Foreign Minister for African Affairs expressed her scepticism on the durability of the agreement, see Mostafa Nasr, 2024.

or control over Red Sea ports. Cairo perceives these as national security issues rather than mere economic matters.

In short, normalisation has reduced overt confrontation but has not erased structural tensions. Turkey is both a competitor and a partner, in an ambivalent duality that defines Cairo's Horn of Africa strategy. While pursuing better relations with Ankara in the Horn, Cairo has simultaneously expanded its defence diplomacy and regional outreach to hedge against both Turkey and Ethiopia. Cairo's 2023 defence pact with Somalia marked its first major military initiative there, responding to Ethiopia's naval ambitions and the GERD dispute[33]. By 2024, Cairo was actively promoting an "anti-Ethiopia axis"[34] with Somalia, Eritrea and Djibouti, while working through the Saudi-led Red Sea Council – which excludes Turkey – to shape regional security on its own terms.[35]

[33] Mohamed Dhaysane, "Somalia, Egypt Sign Defense Pact to Bolster Security Cooperation", *Anadolu Agency (AA)* (online), 14 August 2024, https://www.aa.com.tr/en/africa/somalia-egypt-sign-defense-pact-to-bolster-security-cooperation/3303837 (accessed 06 October 2025).

[34] Kathryn Tyson and Liam Karr, *Africa File, October 17, 2024: Egypt-Eritrea-Somalia Summit; Challenges with Tigray Peace Process* (London: Eritrea Focus, 18 October 2024, https://eritrea-focus.org/africa-file-october-17-2024-egypt-eritrea-somalia-summit-challenges-with-tigray-peace-process/ (accessed 06 October 2025).

[35] Saleh Salem, "Without the United States, Egypt and Saudi Agree to Form Joint Naval Force amid Rising Threats in Red Sea", *The New Arab* (online), 09 September 2025, https://www.newarab.com/news/egypt-saudi-agree-form-naval-force-tackle-red-sea-threats (accessed 06 October 2025).

4.

Ethiopia's Strategic Pragmatism: Ethiopia's Evolving Partnership with Turkey in a Competitive Horn Arena

Turkey's relations with Ethiopia have followed a different trajectory. Ethiopia has generally welcomed Turkey as a valuable economic and security partner, in contrast to Egypt's guarded engagement. Ankara's presence is not regarded as a challenge to Ethiopia's sovereignty or regional influence, but as a contribution to its industrialisation, military modernisation, and regional diplomacy. This reflects both Ethiopia's pragmatic diversification strategy and Turkey's willingness to align with Ethiopian priorities. Both Ankara and Addis Ababa benefited from their estrangement from Egypt. After the 2013 ouster of President Mursi, Turkish–Egyptian relations deteriorated sharply, while Ethiopia was already locked into escalating tensions with Cairo over the GERD since 2011. This parallel rupture with Egypt created a period of tacit alignment, facilitating deeper economic and security cooperation between Turkey and Ethiopia. For Ethiopia, Turkey's estrangement from Egypt translated into investment and security ties that strengthened the Ethiopian government's hand both domestically and in the Nile dispute.

4.1

Turkey's Growing Role in Ethiopia's Industrialisation and Military Modernisation

Economic cooperation forms the backbone of the Turkish-Ethiopian relationship. By the late 2010s, more than 200 Turkish companies were active in Ethiopia, increasing to around 260 by 2025.[36] They employ over 30,000 local workers and have invested around USD 2.5 billion, largely in textiles, construction and manufacturing.[37] By 2025, Turkish investment projects in Ethiopia totalled an estimated USD 6 billion, making Turkey one of Ethiopia's top three foreign investors.[38] Bilateral trade grew from USD 27.4 million in 2000[39] to USD 650 million in 2021, with both sides aiming for USD 1 billion annually.[40] Turkish bank *Ziraat Katılım*'s entry into Ethiopia's banking system and an uptick in Turkish energy and manufacturing projects signal that Ankara intends to remain a long-term stakeholder in Ethiopia's development agenda and economic transformation.

Ethiopia's large population, growing economy, and role as a gateway to landlocked East African markets all enhance its strategic value to Turkey. Projects such as the Awash–Hara Gebeya railway constructed by Turkish company *Yapı Merkezi Holding* complement the Chinese-built Addis Ababa-Djibouti line. Turkish investments in Ethiopia have created tens of thousands of jobs and advanced Addis Ababa's industrialisation goals. Although modest compared to Beijing's, Turkish investment is politically salient, concentrated as it is in labour-intensive sectors that align with Ethiopia's ambition to become a regional manufacturing hub. For Ethiopia's leaders,

[36] Samuel Getachew, "Ethiopia–Turkey: Ankara's Ongoing Economic and Military Support", *The Africa Report* (online), 02 November 2021, https://www.theafricareport.com/141761/ethiopia-turkey-ankaras-ongoing-economic-and-military-support/ (accessed 06 October 2025);
"Türkiye's Investment in Ethiopia Significantly Large: EIC", *Ethiopian News Agency (ENA)* (online), 23 July 2025 https://www.ena.et/web/eng/w/eng_6995897 (accessed 06 October 2025).
Ministry of Foreign Affairs of the Republic of Türkiye, *Relations between Türkiye and Ethiopia*, https://www.mfa.gov.tr/relations-between-turkiye-and-ethiopia.en.mfa (accessed 06 October 2025);

[37] ibid;
Ethiopian News Agency (ENA), 2025;
The Africa Report, 2021.

[38] "Ethiopia and Turkey Strengthen Bilateral Ties through Economic Collaboration and Investment Expansion", *Somali Magazin* (online), 10 January 2025, https://somalimagazine.so/ethiopia-and-turkey-strengthen-bilateral-ties-through-economic-collaboration-and-investment-expansion/ (accessed 06 October 2025).

[39] Turkish Grand National Assembly (TBMM), *Dışişleri Komisyonu Görüşme Tutanakları* [*Minutes of Proceedings of the Foreign Affairs Commission*] (Ankara, 21 November 2012): 34, https://www.tbmm.gov.tr/Tutanaklar/TutanakGoster/182 (accessed 06 October 2025).

[40] Addis Getachew, "Turkey Seeks Preferential Trade Deal with Ethiopia", *Anadolu Agency (AA)* (online), 16 February 2021, https://www.aa.com.tr/en/economy/turkey-seeks-preferential-trade-deal-with-ethiopia/2145955 (accessed 06 October 2025).

Turkey's particular appeal lies in its lack of colonial baggage – similar to China – which makes its engagement politically palatable.

The partnership is embedded in Ethiopia's wider strategy of diversifying external ties. China remains Ethiopia's dominant partner, accounting for one-third of its imports and almost 50 percent of its total FDI stocks (USD 3.55 billion in 2023), and financing thousands of infrastructure projects that knit Ethiopia into continental supply chains.[41] Russia has also stepped up its presence. A naval cooperation agreement was signed in 2024, and in 2025 Rosatom agreed to build Ethiopia's first nuclear plant. Together, these initiatives signal Addis Ababa's commitment to diversifying its energy mix and attracting external funding and technology, even though doing so entails significant regulatory and geopolitical exposure. Ethiopia's accession to BRICS in 2024 also reflects this broader turn toward non-Western partners and alternative financing models, within which Turkey occupies a mid-tier but politically significant role.

The Gulf states have become equally crucial to Ethiopia's Horn strategy. The UAE and Saudi Arabia jointly facilitated the 2018 Ethiopia–Eritrea peace process: Abu Dhabi played the primary mediating role behind the scenes, while Riyadh hosted the formal signing of the Jeddah Agreement. Building on this role, the UAE has since positioned itself at the centre of Ethiopia's maritime ambitions through DP World's investments in Berbera and regional logistics hubs.[42] Saudi Arabia, for its part, has complemented this with financial and educational initiatives while exploring a potential military presence in Djibouti. Qatar has backed mediation in Sudan and Somalia, while the Gulf states more broadly have bought up Ethiopian farmland to secure their food supplies – and reinforcing Addis Ababa's role as a breadbasket for the region.

Turkey's role thus fits squarely with Ethiopia's strategy of foreign policy diversification. Addis Ababa has deliberately expanded ties with emerging powers – including Turkey, China, India, and the Gulf states – to reduce its reliance on Western aid. This became particularly important during the Tigray conflict (2020–2022), when Western donors suspended their support. Turkey maintained trade and investment throughout the conflict, reinforcing Ethiopia's perception of Ankara as a reliable partner in good times and bad.

Security cooperation has become another central pillar of Ethiopia–Turkey relations. Prime Minister Abiy Ahmed's visit to Ankara in August 2021 formalised this aspect, with the two countries signing a set of financial and military cooperation

[41] "China Remains Leading Source of Foreign Direct Investment in Ethiopia: Official", *Xinhua* (online), 11 April 2025, https://english.news.cn/20250411/d9385d5bbad145ebb84454e8b9fbb027/c.html (accessed 06 October 2025).

[42] Micheale Kihishen Gebru, 2025.

agreements.[43] These covered joint exercises, peacekeeping, counter-piracy, intelligence sharing and defence industry collaboration, including the prospect of joint production. During the Tigray conflict, Ankara supplied the Ethiopian National Defense Force with Bayraktar TB2 drones, which were widely credited with shifting the course of the war.[44] Ethiopian officials privately acknowledge that these systems provided a decisive edge at a time when Western governments were holding back or even imposing sanctions.[45] Soon after the end of the Tigray war, Ethiopia's army chief met with Turkish defence officials, and began discussions on arms purchases, training programmes, and even joint production of defence equipment.

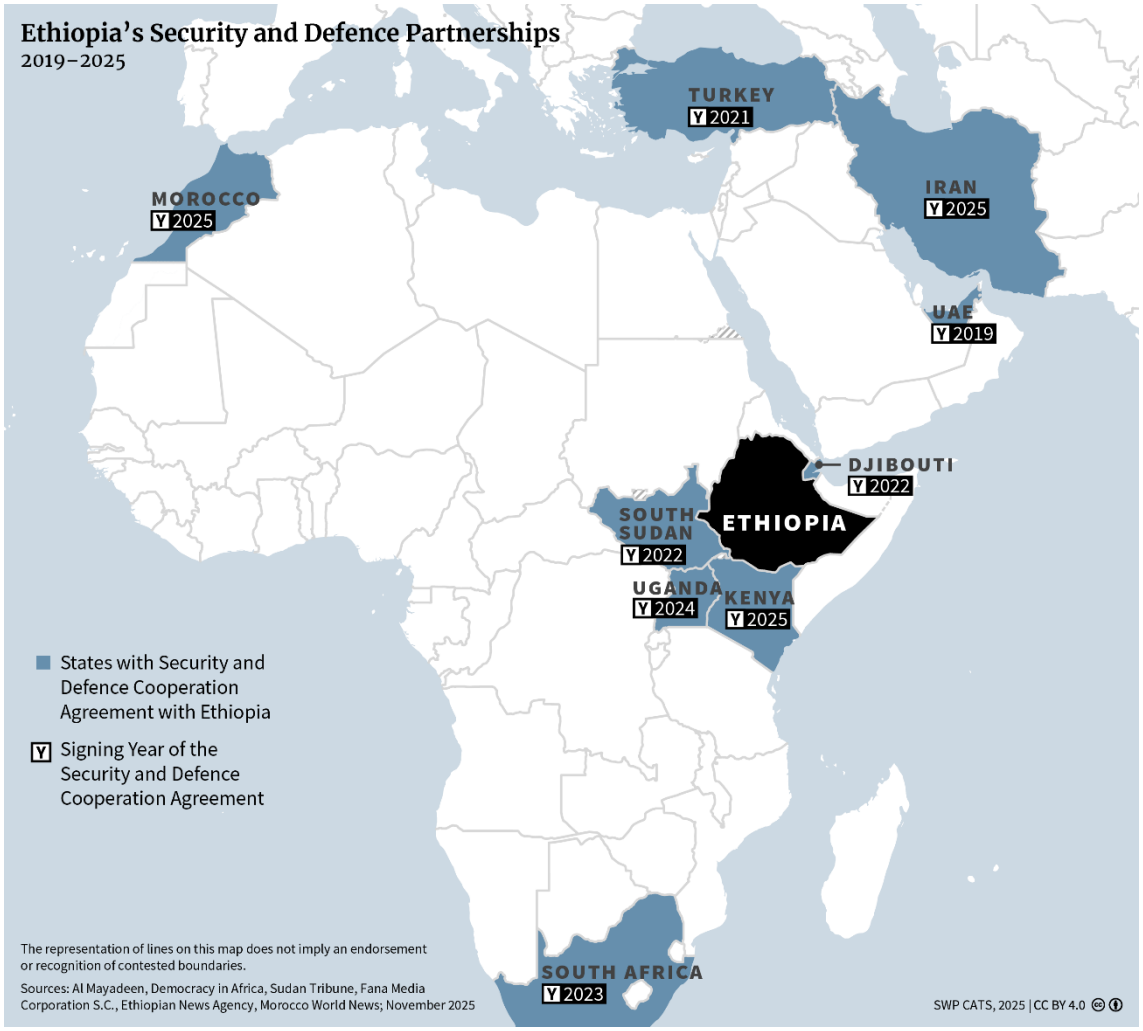
These arrangements offer Addis Ababa access to affordable technology and means to modernise its military, while reducing reliance on politically constrained Western suppliers. For Ankara, they secure a strategic foothold in the Horn of Africa and expand the reach of its growing defence industry.

[43] Thembisa Fakude, "Ties between Turkey and Ethiopia Have Been Strengthened by Their Latest Agreements", *Middle East Monitor* (online), 25 August 2021, https://www.middleeastmonitor.com/20210825-ties-between-turkey-and-ethiopia-have-been-strengthened-by-their-latest-agreements/ (accessed 06 October 2025).

[44] "Turkish Bayraktar TB2 Drones Proving To Be a 'Game-Changer' in Ethiopian Civil War", *M5 Dergisi* (online), 15 December 2021, https://m5dergi.com/defence-news/turkish-bayraktar-tb2-drones-proving-to-be-a-game-changer-in-ethiopian-civil-war/ (accessed 06 October 2025).

[45] Dan Sabbagh, "Ethiopia–Turkey Pact Fuels Speculation about Drone Use in Tigray War", *The Guardian* (online), 04 November 2021, https://www.theguardian.com/world/2021/nov/04/ethiopia-turkey-pact-fuels-speculation-about-drone-use-in-tigray-war (accessed 06 October 2025).

Figure 2



Thus, Turkey's position is best understood as part of Ethiopia's broader strategy of diversifying its security ties across Africa and beyond. In recent years, Addis Ababa has signed defence cooperation agreements with a succession of partners: Kenya (2024), Uganda (2025), South Sudan (2022) and Djibouti (2022) in the immediate neighbourhood; and further afield South Africa (2023) and Morocco (2025). Ethiopia has also sought to create and consolidate ties with non-Western powers outside Africa, including the UAE (2019), China (2024) and Iran (2025). Taken together, this trajectory indicates a deliberate attempt to build overlapping and flexible alliances that reduce Ethiopia's reliance on any single partner. Defence pacts with Turkey and the UAE highlight the growing role of non-Western actors in Ethiopia's security calculus, while agreements with Iran and North African states point to Addis Ababa's ambition to insert itself into wider regional and global security networks.

4.2
Turkey's Growing Role in Ethiopia's Strategic Calculus

In this sense, Turkey's growing presence in Ethiopia now extends well beyond bilateral economic and military cooperation, shaping Addis Ababa's broader approach to the Horn of Africa. Since Turkey launched its Africa Opening in 2005 Ethiopian officials have tended to see Ankara as a diplomatically complementary partner, another emerging middle power seeking greater regional influence without the constraints of Western alliances. Turkey supported Ethiopia's rapprochement with Eritrea in 2018,[46] aligned with the Intergovernmental Authority on Development's regional positions, and consistently backed Ethiopia's bids for influence in African institutions and the United Nations (UN). High-level exchanges, including Erdoğan's visit to Addis Ababa in 2015 and Abiy Ahmed's trip to Ankara in 2021, produced numerous agreements. More recently, Ankara's attempt to mediate in the 2024 Somalia–Ethiopia standoff confirmed its willingness to play a constructive role. Furthermore, Addis welcomed Turkey's growing role in the region, noting that Ankara's sympathy for Ethiopia's position as an upstream state echoed Turkey's own experience with the Tigris and Euphrates.

Consequently, Ethiopia now considers Turkey a useful actor in the Horn for three main reasons. First, Turkey's military presence in Somalia contributes indirectly to Ethiopia's security. Both governments view al-Shabaab as a threat, and Turkish-trained Somali forces have occasionally reinforced Ethiopia's own border defences.[47] During a major Al-Shabaab incursion into Ethiopia's Somali Region in mid-2022,[48] Turkish-trained Somali units were among those battling the militants and helping secure Ethiopia's border. Ethiopia appreciates Turkey's commitment to Somali's stability, which aligns with Ethiopia's own desire for security in its neighbourhood.

Second, Turkey's involvement creates an implicit counterweight to Egypt, which has sought to encircle Ethiopia by deepening its ties with Eritrea and Somalia. Ankara's presence in the Horn offsets Egyptian pressure while complementing Ethiopia's own efforts to secure maritime access and regional influence. This became particularly clear during the crisis over Ethiopia's port access deal with Somaliland, which

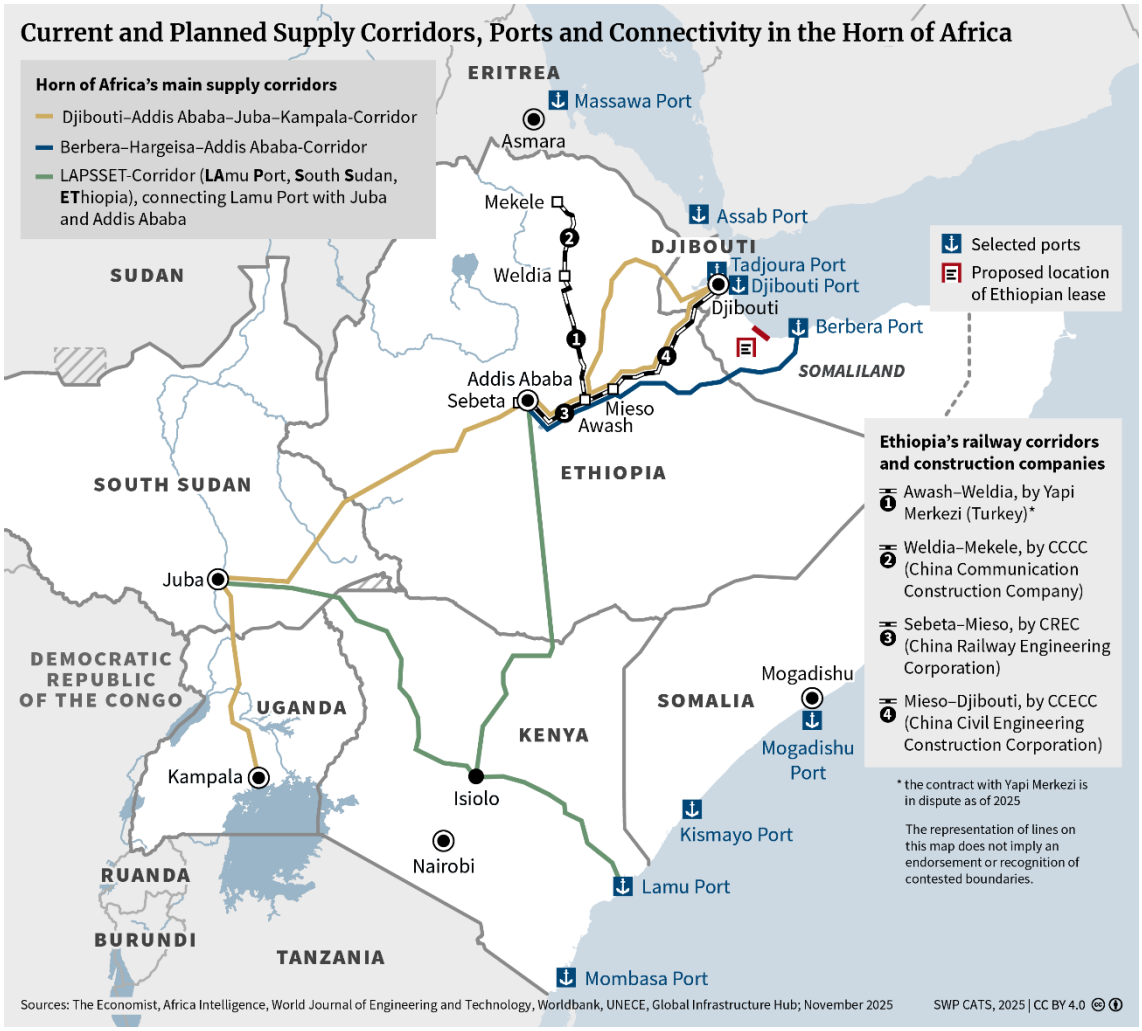
[46] Nilay Kar Onum, "Turkey Hails Ethiopia–Eritrea Peace Efforts", *Anadolu Agency (AA)* (online), 11 July 2018, https://www.aa.com.tr/en/energy/energy-diplomacy/turkey-hails-ethiopia-eritrea-peace-efforts/20814 (accessed 06 October 2025).

[47] Sunguta West, "Al-Shabaab's Attack in Ethiopia: One-off Incursion or Persistent Threat?", *Jamestown Terrorism Monitor* 20, no. 17 (09 September 2022), https://jamestown.org/program/al-shabaabs-attack-in-ethiopia-one-off-incursion-or-persistent-threat/ (accessed 06 October 2025).

[48] "Somalia's al-Shabaab Group Makes Rare Attack near Ethiopia Border", *Reuters* (online), 22 July 2022, https://www.reuters.com/world/africa/somalias-al-shabaab-group-rare-attack-near-ethiopia-border-2022-07-21/ (accessed 06 October 2025).

triggered a sharp reaction from Somalia. Since Abiy Ahmed's rise to power in 2018, Ethiopia has sought to end its geographical isolation and regain access to the sea. To this end, it made peace with Eritrea (which was rewarded with the Nobel Peace Prize) and pursued alternatives including Port Sudan and Djibouti's Tadjoura offer, and most recently, the controversial 2024 MoU with Somaliland granting a leased coastline near Berbera in exchange for recognition. However, Ethiopia's pursuit of maritime access through recognition of Somaliland has brought it into direct conflict with Somalia and provoked reactions from Egypt and Eritrea, undermining the cooperative ethos of Abiy Ahmed's early years.

Figure 3



Mogadishu, backed by Eritrea,[49] aligned more closely with Cairo. It signed new security agreements,[50] requested the withdrawal of Ethiopian troops from Somalia,[51] and even opened the door for an Egyptian military presence. Combined with Ethiopia's disputes with Eritrea and Sudan, and growing alienation from Djibouti, these developments weakened Addis Ababa's regional position. As well as diplomatic isolation, the emerging Egyptian–Eritrean–Somali alignment posed a potential military threat to Ethiopia, with Egyptian officials repeatedly stressing that "all options remain on the table", should GERD operations endanger Egypt's water security.[52]

Third, Ankara's role in facilitating dialogue between Mogadishu and Addis Ababa after the Somaliland port deal helped Ethiopia contain the crisis and kept the door open for discussions over some form of maritime access within a framework that respected Somalia's formal sovereignty. Crucially, the Turkish-mediated Ankara Declaration of December 2024 allowed Ethiopian troops to remain in Somalia under the new African Union Support and Stabilisation Mission (AUSSOM)[53].

This alignment does not eliminate all friction. Ankara's firm backing of Somalia's federal unity clashes with Ethiopia's outreach to Somaliland, a divergence that Addis interprets as a Turkish tilt toward Somalia. At the same time, Ethiopia watches Turkey's normalisation with Cairo closely, mindful of how this could affect regional balances.[54] These dynamics initially placed Ethiopia in a difficult position: one partner, Turkey, was unhappy with its engagement in Somaliland, while another partner, the UAE, which has major investments in Somaliland, encouraged it. Ethiopia's eventual decision to sign an MoU with Somaliland both created a strategic opportunity for Egypt to expand its influence in the Horn and generated unease

[49] "Somalia Claims Eritrea's Support in Row with Ethiopia over Port Deal", *Anadolu Agency (AA)* (online), 09 January 2025, https://www.aa.com.tr/en/africa/somalia-claims-eritrea-s-support-in-row-with-ethiopia-over-port-deal/3104317 (accessed 06 October 2025).

[50] "Egypt Joins AU Peacekeeping Force in Somalia", *Africa Defense Forum (ADF)* (online), 04 August 2025, https://adf-magazine.com/2025/08/egypt-joins-au-peacekeeping-force-in-somalia/ (accessed 06 October 2025).

[51] "Somalia Insists Ethiopia Not Be Part of New AU Mission", *Voice of America* (online), 10 November 2024, https://www.voanews.com/a/somalia-insists-ethiopia-not-be-part-of-new-au-mission-/7858887.html (accessed 06 October 2025).

[52] Amani El-Tawil, quoted in Mostafa Nasr, 2024.
Studies also warns of the risk of direct military confrontation between Egypt and Ethiopia via its military presence in Somalia.
Amanuel Dessalegn Gedebo, "Egypt's Expanding Role in the Horn of Africa", *Clingendael International Affairs Think Tank and Academy*, 10 October 2025, https://www.clingendael.org/publication/egypts-expanding-role-horn-africa (accessed 16 December 2025).
Gerrit Kurtz, Stephan Roll, Tobias von Lossow, "Escalations Risks in the Horn of Africa: Threats from Egypt, Ethiopia, and Somalia Exacerbate Local Conflicts", *SWP Comment 2024/C 50*, 28.10.2024 https://www.swp-berlin.org/10.18449/2024C50/ (accessed 16 December 2025).

[53] Maed Dereje Belachew, "Ethiopia's Enduring Commitment to Peacekeeping in Somalia: From Intervention to Cooperation ", *The Institute of Foreign Affairs (IFA)*, 15 December 2025, https://www.ifa.gov.et/2025/12/15/ethiopias-enduring-commitment-to-peacekeeping-in-somalia-from-intervention-to-cooperation/ (accessed 16 December 2025).

[54] Federico Donelli, 2025.

among other regional states, thereby straining Ethiopia's broader regional diplomacy. Yet, unlike Egypt, Turkey is seen not as a rival but as a stabilising force whose regional posture largely advances Ethiopia's own goals.

More broadly, Addis sees Turkey's regional entanglements – in Somalia, and later with Egypt and the Gulf following Ankara's diplomatic reset[55] – not as liabilities but as assets that can serve its own objectives of securing maritime access and bolstering regional influence. During the Tigray conflict, both Turkey and the UAE supported the Ethiopian central government, despite their rivalries elsewhere.[56] This convergence suggested to Ethiopian leaders that Ankara could be a reliable partner in times of crisis, while Ethiopia could serve as a rare arena where competing Middle Eastern actors align.

In sum, Turkey's role in Ethiopia's Horn strategy is multidimensional. It provides diplomatic leverage, contributes to security, balances against Egypt, and offers mediation capacity. Beyond the bilateral economic and military partnership, Ankara's wider regional engagement makes it a useful ally for Ethiopia as it navigates an increasingly competitive regional environment.

[55] Turkey's rapprochement with the Gulf states has centred on major defence and economic partnerships, including the 2023 Baykar–EDGE (UAE tech group) cooperation deal with the UAE, multi-billion-dollar Saudi–Turkish investment pledges in 2022–23, and joint infrastructure projects. These moves have repositioned Ankara as a partner for the Gulf states rather than a rival, expanding its leverage across the Red Sea and Horn region.

[56] Federico Donelli, 2025.

5.

Volatile Equilibrium: Competitive Cooperation in the Horn

The shifting interplay between Egypt, Ethiopia and Turkey has reconfigured the Horn of Africa's strategic landscape. The old rigid fault lines – with Ankara and Doha on one side, Cairo, Abu Dhabi and Riyadh on the other – have given way to fluid, issue-based alignments. Competitive cooperation now characterises the region, with states manoeuvring strategically among multiple partners, cooperating in one arena while competing in another. Whether this fragile equilibrium produces stability or renewed conflict will depend on whether regional and external actors invest in inclusive order-building rather than sliding back into proxy rivalries.

As already discussed, Egypt has shifted from outright confrontation to guarded engagement; Ethiopia has embraced Ankara as both investor and security partner; and Turkey has moved from episodic involvement to structural entrenchment. This transformation is not simply bilateral but embedded in a wider multipolar environment. As the Gulf states, China, Russia and Western powers compete for influence across Africa, each offering investments, security guarantees and/or political support, the Horn governments have used these overlapping external overtures to expand their bargaining power. While Djibouti hosts multiple foreign bases (American, Chinese and French), Ethiopia relies on Chinese infrastructure loans while simultaneously courting Gulf financing to secure alternative port access. Somalia, for its part, used the intra-Gulf rift to obtain economic and political support from Doha, Ankara, Abu Dhabi and Riyadh, even as it continued to benefit from US and EU security assistance. Sudan similarly oscillated between Turkish, Emirati and Russian engagement, using these partnerships to offset external pressure and diversify its alignments. This pattern of selective alignment maximises the Horn governments' agency but entrenches a volatile order shaped by overlapping external agendas.

In this crowded regional arena, Turkey's activism – whether mediating between Somalia and Ethiopia, taking sides in the Sudan conflict or offering to facilitate

dialogue on the GERD – has enhanced its profile as a power broker.[57] Yet Ankara's approach of combining security cooperation with economic ties and regional diplomacy also creates challenges for its long-term credibility. Drone sales to Ethiopia and deep entrenchment in Somalia generate suspicions that could undermine its mediating role.

For Egypt, Turkey is now both a rival and a partner: a counterweight to Emirati ambitions in Sudan and Ethiopia, but also a potential spoiler through its alignment with Addis Ababa. For Ethiopia, Ankara is becoming a key partner – providing investment, military modernisation, and diplomatic backing for its quest for sea access and strategic autonomy. For Somalia, Turkey remains one of the most consistent external partners, though its balancing between Mogadishu and Addis Ababa entails inherent risks.

The net result is a Horn order that constrains hegemony but perpetuates volatility. No single power – neither Turkey, nor Egypt, nor any of the Gulf states – seems able to dominate. The Horn is no longer defined by rigid blocs, but by a pattern of competitive cooperation where states simultaneously compete and collaborate, recalibrating their positions in response to shifting pressures. They engage in selective alignment, cooperating in one theatre while competing in another (compartmentalised engagement). This new regional order is dynamic, but also volatile. Its stability depends on whether regional and external actors exercise restraint or revert to proxy confrontations.

[57] Yabele Media, 2025.

6.

Policy Takeaways for Europe

For Europe and the EU, the Horn and the Red Sea are strategic corridors. One-third of global trade and much of Europe's energy imports pass through the Suez Canal and the Bab al-Mandeb. Instability – from Sudan's civil war to Houthi attacks on shipping – translates into economic costs, security risks and migration pressures for the EU member states. Egyptian anxieties over Nile water rights, Ethiopia's desire for sea access and Turkey's military footprint all intersect with these regional pressures. The EU and its member states also need to consider the implications of compartmentalised engagement by Cairo, Ankara and Addis Ababa, which has already altered the balance of influence in the Horn. Tactical cooperation among regional powers can produce rapid, tangible effects, as evident in the Somalia–Ethiopia standoff and in the Sudanese civil war.

Turkey's role presents the EU with a dual challenge. On the one hand, Ankara's entrenched position – as investor, arms supplier, mediator and security provider – gives it leverage in arenas where the EU often lacks a presence, such as Somalia's security sector, Sudan's post-coup transition, and Ethiopia's military modernisation. Turkey's engagement in the Somalia–Ethiopia dispute shows that it can operate as a mediator in crises with direct implications for Europe. Conversely, Turkey's strategic alignment with Ethiopia, particularly its supply of military hardware to Addis Ababa, runs counter to the EU's conflict-prevention objectives and may strain the EU's relations with Egypt, which remains central to European cooperation on Mediterranean and migration issues.

Ethiopia's hedging highlights the crowded nature of the multipolar field. Addis Ababa balances among Turkish, Gulf, Chinese and Western partners to pursue its own priorities, leaving European states at risk of being sidelined. Egypt continues to rely on its Gulf allies to dilute Turkey's influence, but its cautious cooperation with Ankara reshapes the strategic environment in ways that Europe must now factor into its policy approach. Taken together, these shifts challenge the EU to rethink how it engages the Horn – not only through humanitarian and development channels, but also in the hard security and diplomatic domains where others are shaping outcomes.

Three priorities stand out for the EU. First, the EU should adapt its missions to the new regional realities. Operation ATALANTA (EU Naval Force Somalia – counter-piracy mission in the Western Indian Ocean), EUCAP Somalia (EU Capacity Building Mission in Somalia, focused on maritime security and policing), and EUTM Somalia (EU Training Mission in Somalia, providing military training to Somali forces) remain important pillars of EU's presence in the Horn,[58] but they risk losing strategic relevance if they are disconnected from the shifting diplomatic and security environment. With Turkey expanding its operational military footprint in Somalia, Egypt deploying troops and supplying arms to Mogadishu, and Ethiopia re-engaging in AU peacekeeping, EU missions need to coordinate more closely with local governments and external actors. Doing so would help avoid duplication, reduce risks on the ground, and allow the EU to act as a stabiliser without being drawn into direct competition with regional military contenders.

Second, the EU needs to consider how to increase its leverage in regional diplomacy. For instance, the EU and its member states could play a constructive role in the deescalating Nile dispute, by encouraging pragmatic dialogue between the conflicting states. Now that the GERD is operational, the confrontation between Egypt and Ethiopia is entering a new phase. Regional tensions between Egypt, Ethiopia and Eritrea have been increasing, and if not addressed will destabilize the Horn and the Red Sea corridor. The EU should therefore consider how to encourage Cairo and Addis Ababa to shift from zero-sum postures to pragmatic cooperation – framing the GERD as a potential shared resource rather than source of conflict. The EU's comparative advantage is its technical support on issues like water and energy, combined with a capacity to facilitate dialogue without prescribing solutions. This is evident in initiatives such as the EU Water Initiative's Nile Basin programme, which facilitated cooperative mechanisms for data-sharing and resource management amid tense Egypt–Ethiopia–Sudan relations, and the EU's support for the Ethiopia–Kenya electricity interconnector through the EU-Africa Infrastructure Trust Fund, which promoted regional energy trading and created openings for broader political dialogue.

Finally, the EU needs to craft a regional strategy for multipolar engagement. The Horn has become a crowded geopolitical arena where Turkey, the Gulf states, China and Russia are expanding their influence. A clear and coherent EU strategy that acknowledges multipolar realities while engaging selectively with Turkey and other regional actors would strengthen Europe's leverage and position it as a credible partner in stabilising a volatile but strategically crucial region.

[58] European Council (EC) ,"Horn of Africa and Somalia: Operation ATALANTA, EUTM and EUCAP Somalia's mandates extended for two years", Press release (Brussels, 16 December 2024), https://www.consilium.europa.eu/de/press/press-releases/2024/12/16/horn-of-africa-and-somalia-operation-atalanta-eutm-and-eucap-somalia-s-mandates-extended-for-two-years/ (accessed 06 October 2025).

Abbreviations

ATALANTA	*Counter-piracy mission in the Western Indian Ocean by EU Naval Force Somalia*
AUSSOM	*African Union Support and Stabilisation Mission*
EUCAP Somalia	*EU Capacity Building Mission in Somalia*
EUTM Somalia	*EU Training Mission in Somalia*
GERD	*Grand Ethiopian Renaissance Dam*
TURKSOM	*Turkish military base and a defence university in Mogadishu, Somalia*
UAE	*United Arab Emirates*
UN	*United Nations*

List of Figures

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The Centre for Applied Turkey Studies (CATS) at Stiftung Wissenschaft und Politik (SWP) in Berlin is funded by Stiftung Mercator and the Federal Foreign Office. CATS is the curator of CATS Network, an international network of think tanks and research institutions working on Turkey.

SWP Stiftung Wissenschaft und Politik
German Institute for International and Security Affairs
Ludwigkirchplatz 3–4, 10719 Berlin
www.swp-berlin.org
www.cats-network.eu
ISSN 2941-4466