

# HOW DOES THE PORT RIVALRY CHALLENGE THE SECURITY LANDSCAPE IN THE HORN OF AFRICA?



ŞEYMANUR MELAYİM  
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**EXPERT BRIEF**  
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   SharqStrategic

Address: Istanbul Vizyon Park A1 Plaza  
Floor:6 No:68 Postal Code: 34197  
Bahçelievler/ Istanbul / Turkey  
Telephone: +902126031815  
Fax: +902126031665  
Email: [info@sharqforum.org](mailto:info@sharqforum.org)

## Introduction

The Horn of Africa has always been more than just a coastline. It is one of the world's ultimate strategic bottlenecks, serving as a vital link between the Indian Ocean and the Mediterranean via the Red Sea. While history books point back to the Romans and the Ottomans, the modern era of the "Great Game" really began with the opening of the Suez Canal in 1869. That single engineering feat turned a two-month journey around the continent into a two-week sprint, placing the Horn of Africa at the absolute center of global trade.

Today, the stakes have shifted from simple passage to total control. When we see middle powers and global giants pouring money into regional ports, they are not merely seeking financial return, but strategic leverage. Control over a port today means the ability to secure supply chains, project military power, and dictate terms to neighbors. Whether it's DP World's massive footprint or Türkiye's deep security ties in Mogadishu, the goal is clear: to gain influence.

This isn't about ships and containers. It's a high-stakes competition where geography has become both a gold mine and a target. For a landlocked Ethiopia, sea access is an existential survival move. For Djibouti, it's a business model that involves hosting a crowded neighborhood of foreign military bases. With Israel's recognition of Somaliland, things have shifted in the region. Israel's interest in recognizing Somaliland is argued to be driven by maritime security concerns in the Red Sea and intensified by Houthi attacks linked to Iran's regional strategy. However, it is more than that. The Israeli government, under the leadership of Benjamin Netanyahu, pursues a strategic objective of preventing regional countries from becoming fully independent and strong. Accordingly, Israel works to undermine the sovereignty and influence of neighboring states by fostering divisions, exacerbating internal conflicts, and encouraging discord within the region. This expert brief argues that disputes in the Horn of Africa (HoA) are transforming economic competition into a multidimensional security dilemma involving regional states, external powers, and unresolved sovereignty claims, such as those of Somaliland, thereby contributing to shifting alliances and heightened regional insecurity.

## The "Hidden Gem" for Investors

Beyond the dominant focus on instability, the Horn of Africa and East Africa stand out as regions with untapped potential for industrialization. The region's underdevelopment is precisely what makes it attractive and dangerous. The market isn't yet saturated like Europe or Asia, and the room for growth is massive.

But this isn't just a win for foreign investors' balance sheets. Real investment translates to jobs for a young, growing population. If the Horn of Africa can move toward a more diversified modern economy, it would give the next generation a reason to stay and build. It shifts the culture from doing "what your father did" to pursuing high level education and technical skills.

Over the past 20 years, there has been a growing interest from external actors such as DP World (UAE), China Merchants Group (CMG), and Türkiye. Of course, all those investors are aiming to preserve their own interests, which is why there have been tensions going on. For example, Djibouti and DP World did clash over control of the Doraleh Container Terminal, a critical Red Sea port. DP World has a 30-year concession starting in 2006, but Djibouti later accused the company of limiting its sovereignty and restricting its ability to attract new investors, especially as China is offering major infrastructure deals in the region. In 2018, Djibouti nationalized<sup>2</sup> the terminal and expelled DP World, arguing that the contract was unfair. DP World brought the case to international arbitration, winning multiple rulings declaring Djibouti's actions unlawful. Despite this, Djibouti continues to operate the port, reflecting deeper geopolitical tensions in the Horn involving Gulf states, China, and Western powers.

### **Competing Model of Development: China vs. UAE**

DP World is a company primarily owned by Dubai. DP World's strategy focuses on no loans, infrastructure development, and operational expertise. 2004/2006 concession agreements in Djibouti gave DP World exclusive rights to operate in Doraleh container terminal, it also gave exclusive authority over any new container ports and free zones in Djibouti. DP World modernized ports across the Horn of Africa, including Djibouti, Somaliland (Berbera port), and Puntland (Bossaso port).

However, the Chinese model is largely driven by CMG, which focuses on large-scale loans, commercial ports, and major infrastructure. It is also argued that China's actions pose a Debt-Trap concern. Djibouti owns 57%<sup>3</sup> of its external debt to China. Ethiopia owes \$31 billion<sup>4</sup> to various creditors, including China. IMF considers Ethiopia's Debt unsustainable despite growth in exports. In this sense, it could be said that China does not directly seek territorial control as DP World does, but those loans create a deep dependence on China.

### **Ethiopia's Maritime Dependency and Rising Pressure**

Ethiopia, with a population of 130 million, is one of the largest landlocked countries, and it relies on Djibouti for almost 95% of its trade.<sup>5</sup> With increased Chinese control over Djibouti's

infrastructure, Ethiopia's bargaining power has weakened. Eritrea gained independence in 1993, after which Ethiopia continued to use Eritrean ports for its trade. Prior to the escalation of tensions, Ethiopia relied heavily on the port of Assab for two-thirds of its global trade. After the Eritrean-Ethiopian war broke out in May 1998, Eritrea closed its ports to Ethiopian cargoes. Despite a peace deal in 2018, the use of the Assab port has not been formally restored.

The landlocked country is seeking new ports. Prime Minister Abiy Ahmed signed a landmark Memorandum of Understanding (MoU) with Somaliland in January 2024, securing a 50-year lease for a naval base and commercial port. In exchange, Ethiopia offered Somaliland a share in Ethiopian Airlines and a path towards formal recognition. However, the agreement was nullified under international law and violated Somalia's sovereignty, prompting the recall of its ambassador from Ethiopia. Israel took the initiative, becoming the first United Nations member state to officially recognize Somaliland.

Ethiopia's access to the sea is considered the government's primary goal. Prime Minister Abiy Ahmed has repeatedly framed access to the sea as a national security imperative, suggesting that Ethiopia cannot indefinitely remain landlocked. He also said he would do what it takes to bring Ethiopia to the sea, even if it ends in a war. With Egypt's agreements to develop seaports in Eritrea and Djibouti, Ethiopia's strategic options have become increasingly constrained. Cairo views these developments as a response to Ethiopia's regional posture, particularly the ongoing dispute between Egypt and Ethiopia over the GERD, which was inaugurated recently. Tensions in the region are clearly rising, and it is important to address these issues early to prevent a larger conflict.

### **Red Sea as a Global Power Arena**

Djibouti, a small country in the Horn, yet holds exceptional strategic importance. It hosts the highest number of foreign military bases per capita in the world, including those of the United States, China, France, Saudi Arabia, Italy, and Japan. Notably, Djibouti hosts Japan's only overseas military base.<sup>6</sup> While Russia does not maintain a base, it has secured access to Port Sudan, further highlighting the region's militarization. Djibouti's strategic value stems from its proximity to the Bab al-Mandeb Strait, which is a critical chokepoint linking the Red Sea and the Indian Ocean.

Having so many foreign powers in place is a heavy burden on Djibouti. Military bases provide economic benefits through rent and investment, yet they also expose the country to intense diplomatic pressure and geopolitical competition. Djibouti must constantly balance competing interests while maintaining internal stability and avoiding becoming

a battleground for intelligence and proxy rivalries. Given that the country is smaller in size than Ankara, this level of militarization poses significant risks alongside its economic rewards.

The Horn has become a convergence point for Gulf states, Western powers, Chinese expansion, and regional rivalries. This competition has turned the region into a geopolitical chessboard, where multiple actors seek influence over ports, sea lanes, and security arrangements. Within this context, Israel has emerged as a new and controversial actor in the region.

#### Israel's Involvement in the Horn of Africa

Israel's recent recognition of Somaliland<sup>7</sup> has placed it directly within the Horn's complex political landscape. While Israel has framed its engagement primarily in terms of countering Houthi threats in the Red Sea, the move has sparked wider controversy. Palestinians have condemned the recognition, alleging that it may be linked to a broader forced displacement plan. Critics have also pointed to the contradiction between Israel's recognition of Somaliland and its continued refusal to recognize Palestinian statehood.

Since the announcement on December 25, 2025, several actors, including the African Union, Somalia, and Türkiye, have rejected Israel's recognition of Somaliland, arguing that it undermines regional stability. For many observers, this has raised concerns that Israel, already deeply involved in Middle Eastern conflicts, is now contributing to new tensions in the Horn of Africa.

A key question could be raised: why did Israel choose to recognize Somaliland now? Can Israel establish a military base there? According to multiple reports, Israel's recognition of Somaliland was conditional, which included accepting the resettlement of Palestinians, hosting an Israeli military presence, aligning with the Gulf of Aden, and lastly joining the Abraham Accords, all in exchange for formal recognition.<sup>8</sup> Somaliland has spent more than three decades presenting itself as an exception within the Horn of Africa, emphasizing relative political stability, competitive elections, functioning state institutions, and its own currency, flag, and parliament. Yet despite these features, international recognition had long remained elusive. The recognition of Somaliland was also condemned by some Israeli figures as well. Israeli opposition leader Yair Lapid condemned his country's recognition of Somaliland and accused Netanyahu of acting without institutional consent and transparency.

The timing of Israel's decision appears significant. Just days before the announcement, Türkiye and Somalia finalized the SOMETURK<sup>9</sup> agreement, which covers maritime security and fishing rights in Somali waters. Given that Türkiye's operational presence at the Port of Mogadishu, Israel's recognition of Somaliland can therefore be interpreted as a strategic signal that the emerging Ankara–Mogadishu maritime partnership in the Red Sea and western Indian Ocean is not unchallenged.

## Conclusion

The Horn is more unstable than ever; Port rivalries have intensified, driven by the region's position along one of the world's most critical trade lines. At the same time, the Horn remains underdeveloped and urgently needs investment to improve infrastructure, expand port capacity, and modernize trade facilitation. External investments can bring tangible benefits to territories such as Somalia, Puntland, and Somaliland by supporting economic growth and connectivity. However, those investments are rarely neutral. Each actor seeks not only economic returns but also influence, leverage, and a voice in local political and security arrangements.

The growing port rivalry in the Horn of Africa risks undermining local sovereignty as control over ports, logistics corridors, and security frameworks becomes increasingly contested. While it is evident that port modernization can generate employment opportunities for local populations and expand access to higher education, large-scale external interference has also contributed to political instability across the Horn. Unresolved territorial conflicts between Ethiopia and Eritrea, where both appear willing to escalate towards full-scale conflicts. Another level of geopolitical complexity has been introduced by Israel's recognition of Somaliland, which makes it the only UN member state to do so. These dynamics create a classic security dilemma when coupled with overlapping security partnerships among external powers and neighboring states. The concentration of multiple actors in a relatively small geographic area further raises concerns about proxy competition, in which local disputes become entangled with broader geopolitical rivalries. Whether the Horn evolves into a new era of conflict or emerges as a model of managed cooperation and shared prosperity will depend on the choices made today by those actors.



## Endnotes

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## ABOUT THE AUTHOR

Şeymanur Melayim is an intern at Al Sharq Strategic Research her research interests focus on water management and transboundary governance particularly in the MENA region. She recently graduated from Sabahattin Zaim University with a degree in political science and international relations.