



Intra-Gulf Competition in Africa's Horn: Lessening the Impact

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Principal Findings

What's new? Middle Eastern states are accelerating their competition for allies, influence and physical presence in the Red Sea corridor, including in the Horn of Africa. Rival Gulf powers in particular are jockeying to set the terms of a new regional power balance and benefit from future economic growth.

Why did it happen? Regional instability, a relative power vacuum and competition among rising Middle East states have prompted Gulf countries to seek to project their power outward into the neighbourhood. They are looking at the Horn of Africa to consolidate alliances and influence.

Why does it matter? Many new Gulf-Horn relationships are highly asymmetrical, driven more by Gulf than African interests. Gulf states are injecting resources and exporting rivalries in ways that could further destabilise fragile local politics. Yet they also carry the potential to resolve conflict and fuel economic growth.

What should be done? Horn and Western policymakers should seek to limit intra-Gulf sparring in Africa, notably by expanding the role of regional multilateral organisations to boost Horn states' bargaining power. Gulf rivals must become convinced – by their allies or their own experience – that their actions are undermining long-term security across the Red Sea basin.

Executive Summary

The Horn of Africa, long the site of great power competition, today sees a new rivalry playing out on its shores. Gulf Arab countries, as well as Turkey, are accelerating their push for allies and influence in the Horn, such that two of the Middle East's primary political fault lines – between Iran and Arab states, and among Arab states – are becoming visible across the Red Sea corridor. These longstanding, intersecting rivalries are grafting themselves onto existing local conflicts and generating new tensions. African policymakers, as well as Gulf countries and Western allies, are only beginning to discuss how to prevent competition from evolving into open conflict. A growing number of leaders in the Horn argue the region must achieve greater bargaining power for itself, for example seeking to engage multilaterally with the Gulf and Turkey. Given their enormous influence – as allies, investors, donors and mediators – Gulf states and Turkey should use it to reduce rather than stir up conflict in the Horn.

For political, economic and ideological reasons, Saudi Arabia, the United Arab Emirates (UAE), Qatar and Turkey are locked in a push-pull to set the rules for a Middle Eastern region long in turmoil. Two overlapping rivalries drive and define this engagement: a split within the Gulf pitting Saudi Arabia, the UAE and Egypt against Qatar and Turkey; and competition between Saudi Arabia and Iran.

In both those struggles, the main rivals see Africa as a new arena for competition and building alliances, particularly as the Horn is poised for strong economic growth over the next generation. With their significant financial resources, the Gulf countries and Turkey see a chance to adjust the future economic and political landscape of the Red Sea basin in their favour. They are all expanding their physical and political presence to forge new partnerships and ring-fence their enemies – most often one another.

In strengthening their relationships in the Horn, Gulf states and Turkey hope to secure both short- and long-term interests. In the short term for example, the Yemen war made it imperative for Saudi Arabia and the UAE to obtain a Red Sea military base. The internecine Gulf crisis that burst into the open in 2017 accelerated efforts by both sides of the rift to seek new allies. In the long term, each country is jockeying for a prime position in the Red Sea corridor's economy and politics. Economically, they seek to enter the Horn of Africa's underserved ports, energy and consumer markets as gateways to rapid economic expansion across the continent. All four describe China as the emerging dominant force in the Horn, and hence one with which they will need to ally, as U.S. and European influence recedes. The UAE, Qatar and Turkey, in particular, view China's Belt and Road initiative (BRI), with projects planned across East Africa, as a chance to bolster their relationships with Beijing.

The tools in this new power scramble range from transactional to coercive. Gulf countries and Turkey can offer aid and investment in amounts that few others can, or in market conditions that many Western firms consider too risky. Their terms for dispensing aid are often more attractive for local political leaders than those of Western donors. Instead of democratic or market reforms, Gulf states expect preferential access to new investment opportunities and ask aid recipients to take their

side in either of the two rivalries in which they are involved. In exchange for military assistance, Gulf states may ask their local allies to push back or suppress domestic political forces aligned with their external enemies.

This competition for influence raises risks of new conflict. The Gulf states and Turkey each say they are seeking “stability” in the Horn, but their definitions differ dramatically and put their interests directly at odds. Saudi Arabia and the UAE view civil unrest as something to control lest the region become a playground for Sunni Islam-inspired political movements or Iran. They privilege short-term stability imposed by strong security states. Although they urge allies to open their markets to investment, they would rather bandage economic grievances and postpone hard reforms that would threaten the status quo. Qatar and Turkey, meanwhile, are more inclined to see popular uprisings as a way to empower groups such as the Muslim Brotherhood that they believe will promote their interests in the long run. Yet the Brotherhood and its local spinoffs have overreached in some cases since the 2011 uprisings by imposing their ideological agendas and thus creating as many new grievances as addressing existing ones.

With their competing views, these two camps consider relationships in the Horn to be a zero-sum game, pressing states to take sides and supporting domestic opposition groups or local leaders if national capitals do not oblige. They can do this because relations between the Gulf and the Horn are deeply asymmetrical and favour the former.

African leaders have raised alarms about the implications of a more activist Gulf foreign policy for some time, but Western policymakers have only recently woken up to the gravity of these dynamics. Together, they should consider how to set institutional boundaries on competition, such that the Horn can resist the most destructive external rivalries, penalise behaviour that undermines local institutions and oppose unfair stipulations in commercial contracts. Efforts are already under way to create regional forums at which Gulf and Horn countries can discuss their concerns, including separate initiatives led by the Horn's Intergovernmental Authority on Development (IGAD), the EU and Saudi Arabia and Egypt. In the meantime, African and Western diplomats ought to try to convince Gulf countries to rethink their modus operandi in the Horn.

Ultimately, the Gulf States and Turkey must become convinced – whether through diplomacy or their own experience – that while competition and rivalry may serve their immediate political and commercial goals, it is just as likely to harm the long-term stability of a fragile region that sits just across the water, and ultimately redound to their own disadvantage.

**Riyadh/Abu Dhabi/Doha/Ankara/Nairobi/Addis Ababa/
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Intra-Gulf Competition in Africa's Horn: Lessening the Impact

I. Introduction

Over the last decade, Saudi Arabia, the United Arab Emirates (UAE), Qatar and Turkey have dramatically increased their physical, economic and political presence in Africa. Policymakers in Riyadh, Abu Dhabi, Doha and Ankara each describe this new power projection as seizing a long-overlooked opportunity.¹ Hosting just a handful of embassies at the start of the decade, the continent now has at least two Gulf state or Turkish missions in nearly every country.² This growth has been particularly striking in the Horn of Africa, where Gulf states are playing a significant role in shaping political transitions in Ethiopia and Sudan, and influencing conflicts in Somalia, Eritrea, Djibouti and South Sudan. What distinguishes these countries' engagement with African actors are the significant resources they are willing to deploy, the speed with which they can react and the intensity with which they are willing to pursue their political interests. Today, while local and great power dynamics still set the context, this new competition increasingly drives the plot.

Gulf countries and Turkey point out that they have a long history in the Horn. Before 2011, economic and cultural ties mostly dominated the relationships. Trade across the Red Sea is centuries' old. Large diasporas from the Horn live and work in the Gulf and in Turkey, sending hundreds of millions of dollars back in remittances.³ Saudi Arabia and Kuwait were among the first Gulf donors to the region, offering aid through development funds and religious charities.⁴ Riyadh built mosques and proselytised its Wahhabi interpretation of Sunni Islam.⁵ The Kingdom led a wave of Gulf

¹ A senior Saudi official said: "We had neglected Africa for decades. The entire Arab world had, not just Saudi Arabia. Now is the time to engage and put our weight into the development of these countries – not just financially but also as partners". Crisis Group interview, Riyadh, December 2018. Crisis Group interviews, UAE foreign ministry official, Abu Dhabi, July 2018; and Qatari senior official, Doha, December 2018. Turkish President Recep Tayyip Erdoğan, speech to the Turkey-Africa Economic and Business Forum, 10 October 2018.

² See Appendix B, Diplomatic Presence in Africa by Region.

³ Saudi Arabia is one of the largest single sources for remittances to Ethiopia and Sudan. In 2017, the Kingdom accounted for \$191 million in remittances of \$816m total to Ethiopia and \$71 million of \$177m total to Sudan. These figures may well underestimate reality as they include only confirmed transactions reported by their respective finance ministries. See "Bilateral Remittance Matrix 2017", World Bank Migration and Remittances Group, Published April 2018.

⁴ Historical aid data for the Kuwait Fund for Arab Economic Development, <https://bit.ly/2XIQ1DX> (loans); <https://bit.ly/2XqSMLT> (grants and technical assistance). Data on East Africa from the Saudi Fund for Development, <https://bit.ly/2NylLcp>; King Salman Centre for Humanitarian Relief, <https://bit.ly/2KWceF1>.

⁵ Wahhabism refers to a particular strand of Sunni Islam originating from 18 century scholar Mohammed bin Abd al-Wahhab, and has served as the de facto state religion in modern Saudi Arabia. Wahhabis, who often prefer to call themselves Salafis, seek to purify Islamic practice from what they consider deviations from Prophet Mohammed's original teachings. In its evangelisation, Wahhabism at times has had the effect of stigmatising, marginalising and even persecuting followers of other Islamic strands that contradict its strict puritanical interpretations.

investment into arable land in the 1980s to shore up food security.⁶ Qatar carved out a niche in the 2000s on conflict mediation, including for the war in Darfur.⁷ The UAE's Dubai Ports World (DP World), meanwhile, signed its first agreement in the region in 2006 to develop Djibouti's Doraleh port. Turkey's aid and civil society organisations have built hospitals and schools across the Horn, while Turkish companies that pioneered low-cost infrastructure contracting are executing some of the largest projects in the region after China.

What has changed over the last decade, and particularly since 2015, is the emergence of a more overt political agenda in these countries' calculations. The shift began in 2011 with the turmoil that followed the Arab uprisings. As regimes in Tunis, Cairo, Tripoli, Damascus and Sanaa faltered, the Gulf states and Turkey each invested heavily in preferred allies. Two contradictory axes emerged: on the one hand, Saudi Arabia and the UAE favoured strong central governments that restored security over chaotic democratic transitions ideologically led by the Muslim Brotherhood or its affiliates. They also sought to push back against growing Iranian influence in the region, made possible initially by the U.S. invasion of Iraq in 2003 and propelled by the upheavals since 2011. On the other hand, Qatar and Turkey cemented ties with Islamist forces during the uprisings and continued to back them financially and through the media. They occasionally pushed back against Iran, for example in the Syrian civil war, but did not prioritise Tehran among their regional enemies.

In nearly every Middle Eastern battlefield, one or both sides of the Gulf rift lost ground, as did Turkey, while Iran appeared to be gaining a stronger foothold.⁸ To rebalance the equation in their favour, each of these states turned to the Red Sea basin to protect and redouble their investments. The Middle East's volatility had left Abu Dhabi and Doha in particular feeling they were surviving in the eye of the storm. To weather it, they had to secure the neighbourhood.⁹ Riyadh, meanwhile, saw the chance to claim a position of Arab leadership – which it had only ever previously shared with Egypt, Iraq or Syria. Ankara, chastened by its inability to unseat Syria's President Bashar al-Assad, sought new ways to fortify its official narrative pitching Turkey as a humanitarian and economic model for the Sunni Muslim world. For their own domestic reasons, each of these states cast its gaze outward for new or stronger allies.

These trends were already visible when Saudi Arabia's King Salman bin Abdulaziz al-Saud ascended the throne and named his favoured son as defence minister in 2015. Mohammed bin Salman's first public act was to send a military coalition into Yemen

⁶ See Jos Meester, Willem van den Berg and Harry Verhoeven, "Riyal Politik: The Political Economy of Gulf Investments in the Horn", Clingendael, April 2018.

⁷ See Sultan Barakat, "Qatari Mediation: Between Ambition and Achievement", Brookings Doha Center Analysis Paper, 2014.

⁸ Doha, Ankara and Riyadh each backed rebel groups fighting the Syrian government but disagreed about which rival groups to support, which fragmented the armed Syrian opposition and undermined cooperation in the fight against the Syrian regime. This played to the advantage of Iran and Russia, which emerged as the major external victors backing Syrian President Bashar al-Assad. The Gulf Cooperation Council engineered Yemen's political transition, which faltered in 2014 when Huthi rebels from the north, at the time loosely allied with Tehran, swept into the capital. Qatar and Turkey supported Egypt's first elected president, Mohamed Morsi, whose ouster was supported by and later buttressed with aid from Saudi Arabia and the UAE.

⁹ A senior UAE official said: "We cannot be the only good house in a bad neighbourhood". Crisis Group interview, Abu Dhabi, June 2019.

to unseat Huthi rebels who, with loose backing from Tehran, had swept southward to Bab al-Mandab, a key chokepoint for global trade at the mouth of the Red Sea. The UAE, Qatar and Turkey all joined a Saudi-led coalition to push them back.¹⁰

Thus the Red Sea corridor became directly implicated in the region's turmoil. Riyadh and its strongest coalition partner, Abu Dhabi, sought new relationships in the Horn of Africa that could limit Iran's reach. As a Saudi analyst put it: "We needed to ensure that both flanks of Bab al-Mandab were secure. We wouldn't want to end one war only to find that we have another conflict [to roll back Iran] on the other side".¹¹ In exchange for new aid, warmer ties and help lifting international sanctions, Saudi Arabia convinced both Sudan and Eritrea to expel Iran's presence in 2015. Khartoum agreed to send ground forces to aid the coalition's war effort in Yemen, while Eritrea leased a military base near the port of Assab to the UAE and, according to some unconfirmed reports, dispatched a few hundred soldiers.¹² In 2017, the UAE won additional agreements to develop a military base in Berbera, Somaliland, and expanded its military footprint in Bosaso, in the Somalia region of Puntland, where it had been training a maritime police force to combat piracy.¹³

The June 2017 crisis between Qatar and other Gulf states accelerated their turn toward the Horn. Saudi Arabia, the UAE, Bahrain and Egypt broke ties with Qatar, and imposed an economic and travel blockade. The dispute exposed an unofficial split over the role of political Islam in the region, as well as over Riyadh's dominance in shaping Gulf foreign policy. Both axes quickly embarked on a global tour to win allies to their side, nowhere more ruthlessly than Africa. Poorer countries on the continent at times found it hard to resist trading their loyalty for hard cash. To Gulf eyes, the Horn also superficially contains many of the same ingredients that were central to the Gulf rift: Islamist forces, a lingering Iranian influence and significant economic potential, factors that make it ripe for intra-Gulf competition. For countries already inclined to see a great game for dominance under way, the Horn was a clear next stop.

In the last two years, several instances of competition have upped the ante between Gulf rivals. The UAE and Qatar each cite an ugly 2018 dispute (in which they paid their respective Somali allies to undermine the other's interests) as evidence that the other's presence is a problem that needs addressing.¹⁴ Saudi Arabia, the UAE, Qatar and Turkey are all seeking to influence political transitions in Ethiopia and Sudan. In the latter country, Riyadh and Abu Dhabi in the earlier stages demonstrated that they are willing to overlook significant violence committed by military allies in order to ensure a friendly government is in power. All sides have poured investment and aid into countries across Africa, and much cash into the pockets of local leaders and politicians, who have often exploited it to advance their own narrow agendas.

¹⁰ Saudi Embassy in Washington, "Saudi Arabia Launches Military Operations in Support of Legitimate Yemeni Government", 25 March 2015.

¹¹ Crisis Group interview, Saudi analyst, Riyadh, October 2018.

¹² "Sudan says will take part in Yemen campaign with ground, air forces", Reuters, 26 March 2015. A former Eritrean official said the country had sent about 400 soldiers to Yemen in support of the Saudi-led coalition's campaign there. Crisis Group interview, European capital, July 2019.

¹³ Crisis Group Middle East Briefing N°65, *The United Arab Emirates in the Horn of Africa*, 6 November 2018.

¹⁴ See Crisis Group Africa Briefing N°260, *Somalia and the Gulf Crisis*, 5 June 2018.

The Gulf's internal crisis has also intensified economic competition. The Horn has some of the highest GDP growth rates in the world, and Gulf sovereign wealth funds, transport firms and other investors see the potential to benefit richly from that growth if they get their foot in the door early on and cut out their rivals.¹⁵ For now, the region's infrastructure is insufficient to meet growing demand for basic goods and fuel.¹⁶ The UAE and Turkey in particular have experience building the deep-water ports and transportation infrastructure that could connect Africa's growing consumer class to markets.¹⁷ The Horn has also emerged in recent years as a magnet for oil and gas exploration, with oil companies discovering significant fields in Ethiopia, Kenya, Uganda, Tanzania and Somalia, and making moves to tap the region's suspected vast hydrocarbon potential.¹⁸ Countries that invest early in port, rail and pipeline infrastructure will enjoy an advantage when these resources come online.¹⁹ Moreover, the firms running Africa's future ports will gain the ability to shape which other countries will benefit and by how much.

China's significant role in the Horn adds to the economic attraction. Beijing has become the largest buyer of Middle Eastern oil and gas over the last decade; for this reason, both sides of the Gulf crisis have worked hard to improve ties.²⁰ Turkey, Qatar and the UAE are pitching themselves as China's best partners for its Belt and Road Initiative, whose projects stretch from the Indian Ocean and East Africa to the Horn and the Suez Canal.²¹

With this potent mix of economic, security and political interests, Gulf states are likely to continue vying for power and influence in the Horn well into the future. Saudi Arabia seeks to quarantine the region from Iranian influence while boosting its credentials as the littoral states' leader. The UAE aims to leverage its political and military presence to push back against an array of perceived foes: Islamist movements backed by Qatar and Turkey, as well as Iran. Qatar, for its part, sees vast potential for new friends and investments to bolster its independence, while outmanoeuvring the Gulf adversaries blockading it. Ankara is weaving a story of Muslim leadership,

¹⁵ Ethiopia, for example, grew at an average of roughly 10 per cent between 2006-2007 and 2016-2017. "The World Bank in Ethiopia", at www.worldbank.org/en/country/ethiopia/overview.

¹⁶ "The UAE is scrambling to control ports in Africa", *The Economist*, 19 July 2018, at www.economist.com/middle-east-and-africa/2018/07/19/the-uae-is-scrambling-to-control-ports-in-africa.

¹⁷ A Dubai Ports World official explained: "Even Berbera and Assab together are not sufficient if Ethiopia achieves half of what it aims to do" in terms of economic growth. Crisis Group phone interview, September 2018.

¹⁸ "Africa's position as the world's hottest oil and gas frontier to be entrenched this year", African News Agency, 22 January 2019.

¹⁹ One potential example comes from Qatar's announced plan to expand the Somali port of Hobyo, which sits near a site that is thought to be rich in hydrocarbons and has recently attracted interest from investors. See Jonathan Fenton-Harvey, "Qatar seeks increasing development projects in Africa", *Al-Monitor*, 6 Sept 2019, at www.al-monitor.com/pulse/originals/2019/09/qatar-support-projects-africa-somalia.html.

²⁰ Observatory of Economic Complexity, "Saudi Arabia", 2018, at <https://atlas.media.mit.edu/en/profile/country/sau>.

²¹ See for example: Recep Tayyip Erdoğan, "Turkey, China share a vision for future", *Global Times*, 1 July 2019; "UAE, China issue joint statement on strengthening comprehensive strategic partnership", Emirates News Agency, 23 July 2019; "UAE to become a shining pearl along Belt and Road", says Chinese Foreign Minister", Emirates News Agency, 21 July 2019; and "Qatar's emir and Chinese president sign several agreements: QNA", Reuters, 31 January 2019.

built on its accumulated credibility in Somalia. Turkish businesses have had remarkable success on the continent.

Political and military actors in the Horn have seized on these rivalries to advance their own goals in ways both positive and negative. Eritrea's long-ruling strongman Isaias Afwerki has parlayed ties with Riyadh and Abu Dhabi to earn sanctions relief and partially rehabilitate his international image, while offering no space for political reforms at home. Sudan's military rulers sought political cover from their Gulf allies to cling to power. Ethiopia turned to Saudi Arabia and the UAE for much-needed funding, while keeping an open line to Qatar. Neighbouring Kenya has in turn sought help from Doha as a potential mediator in its maritime border dispute with Mogadishu. In Somalia, duelling political candidates see the cash-rich Gulf actors as sometimes gullible conduits for campaign money. More positively, hinting at ways actors in the Horn can exploit the rivalry to draw wider benefits, Djibouti, Somaliland and Puntland have all at various times milked the competition for strategic ports between the Gulf and China to secure better deals.

While the Horn could leverage competing interests to its advantage, particularly by building greater economic connectivity across the Red Sea, these external actors – with vastly disproportionate resources – have an outsized influence for now on the partnerships they are seeking to establish. As an Ethiopian analyst observed: “The Gulf's impact on the Horn depends on how that individual [Gulf] country behaves. The Gulf-Horn relationship is so asymmetrical that the Gulf is the one that decides what kind of relationship they can have”.²²

While the destructive impact of these new dynamics is increasingly clear, the motivations behind them and the potential to turn them in a positive direction remain largely underexplored for policymakers in the Horn and beyond. This report, based on high-level conversations in Riyadh, Abu Dhabi, Doha and Ankara, as well as Nairobi, Addis Ababa and Washington, seeks to clarify these actors' goals and ambitions, and propose ways to mitigate the destabilising impact of unbridled competition in the Horn.

²² Crisis Group interview, Ethiopian analyst, Addis Ababa, March 2019.

II. Saudi Arabia: Outmanoeuvring Iran

When Saudi officials speak about historical precedents for their aspirations to play a leadership role in the Horn, they often cite the rule of King Faisal (1964-1975), who travelled the continent widely, launched the Saudi Fund for Development and held a large rolodex of African allies.²³ A strong U.S. partner in the Cold War, the Kingdom financed U.S.-led pushback against leftist movements and Soviet-backed governments, including in the Horn. This new Saudi aid system poured money into Chad, Sudan and Somalia, as well as to the rebels who would eventually establish an independent Eritrea.²⁴ Saudi charities had the state's implicit approval to use Wahhabism as a counterweight to Soviet influence.²⁵ Many of these religious charitable networks, and their ideological imprint, persist to this day.

As the Saudi economy accelerated in the 1970s, it demanded more imported food staples and migrant workers, both of which the Horn could provide. Large diaspora communities formed in the Kingdom, including from Sudan and Ethiopia. Meanwhile, public and private Saudi investors leased significant swathes of land in those two countries, hoping to build a new breadbasket across the Red Sea from Jeddah.²⁶

Once the Cold War ended, key partners such as Sudan and Somalia continued to receive Saudi aid, and Saudi Islamic charities remained active throughout the continent. Yet African countries played only a limited role in the Kingdom's foreign policy until 2015, when King Salman took the throne.

Three key developments pushed Africa back onto the priority list. First, Iran emerged as an apparent "winner" amid the upheaval following the Arab uprisings – just as the U.S. was negotiating a nuclear deal that would lift some sanctions on Tehran. Riyadh considered that its rival was gaining the upper hand and sought new theatres in which to push back. Secondly, the war in Yemen pushed Riyadh to secure new allies on both coasts of the Red Sea. And thirdly, King Salman and his son Mohammed bin Salman consolidated foreign policy under the Royal Court around the idea of stronger Saudi leadership in the Middle East, among Muslim populations and globally as a G20 economy. Africa presented an obvious but overlooked opportunity, said a Saudi diplomat:

Africa is a priority for the Kingdom, beginning from when King Salman took power. He saw that there was a missed opportunity to engage. [...] There is a cultural, religious and economic basis for a stronger relationship with Africa, but those ties were never activated. That, plus seeing that others may try to fill the vacuum in the region. [...] We saw that, in the longer term, it was important that we are engaged with Africa.²⁷

²³ Crisis Group interview, Saudi analyst close to the government, Riyadh, October 2018.

²⁴ Crisis Group interview, Eritrean diplomat, March 2019.

²⁵ See Toby Matthiesen, "Saudi Arabia and the Cold War", in Madawi al-Rasheed, ed., *Salman's Legacy: The Dilemmas of a New Era in Saudi Arabia* (London, 2018).

²⁶ See, for example, Peter Schwartzstein, "One of Africa's Most Fertile Lands Is Struggling to Feed Its Own People", *Bloomberg Businessweek*, 2 April 2019.

²⁷ Crisis Group interview, Saudi diplomat, Washington, August 2018.

In February 2018, Saudi Arabia for the first time appointed a state minister for African affairs. Though seated in the foreign ministry, he was empowered directly by the Royal Court.

A. *The Iranian Spectre*

Africa's newfound importance in Saudi foreign policy stems from a single overriding goal: to reduce Iran's footprint and restore the Kingdom to what it sees as its "natural" position as a regional leader. Riyadh considers centralised security regimes best placed to preserve stability – a view solidified by Iran's ability to gain ground in the wake of the Arab uprisings. As one analyst close to the government explained: "there is one side that benefits from instability in our region, and that is Iran".²⁸ Riyadh typically offers a combination of development and humanitarian aid, Central Bank deposits, investment and at times cash handouts to maintain the status quo.

Saudi Arabia began jostling with Iran in the Horn in 2015, focused on combatting specific perceived threats emanating from the Yemen war. Riyadh, which views the Huthis as Iranian proxies, moved to squeeze out any official Iranian presence from Red Sea coastal states and to ensure the latter's allegiance went to the Kingdom.²⁹ Most visibly, King Salman orchestrated a Gulf Cooperation Council (GCC) military basing agreement with Eritrea in April 2015 in support of Saudi-led coalition efforts in the Yemen war.³⁰ In securing GCC access to Assab, Riyadh precluded Tehran from accessing the facilities as it had over the previous decade.³¹

Saudi policy toward Sudan formed the centrepiece of the anti-Iran approach. In 2013, with Saudi support, the GCC developed a common policy to bring Sudan closer into its orbit, at a moment when international sanctions had isolated Khartoum and kept it relatively close to Tehran, another international outcast.³² The Yemen war gave further incentive. Saudi Arabia wanted to boost its anti-Huthi coalition with additional Arab states and was keen to ensure Iran could not access Sudan, which holds the Horn's second longest stretch of Red Sea coastline. Khartoum, meanwhile, was hungry for aid, sanctions relief and a route to normalising relations with the West.

Amid promises of all three, Bashir aligned Sudan with the coalition, sent thousands of troops to Yemen and, in January 2016, cut ties with Iran when protesters

²⁸ Crisis Group interview, Saudi political analyst close to the government, Riyadh, October 2018.

²⁹ Crisis Group interview, Saudi political analyst close to the government, Riyadh, October 2018. A senior Saudi diplomat said: "This made us very serious to control the Red Sea coast. We should not leave [the Red Sea] for any militia. We have to protect it from Iran, the Huthis and any other militia". Crisis Group interview, Riyadh, October 2018.

³⁰ Saudi Arabia's primary coalition partner, the UAE, operates and uses the Assab base as a primary staging ground for operations in Yemen's western and southern theatres. The lease agreements and exact terms between Eritrea, Saudi Arabia and the UAE are not public.

³¹ Crisis Group interviews, senior Saudi diplomat, Riyadh, October 2018; Saudi political analyst close to the government, Riyadh, February 2018.

³² Discussions between the GCC and Khartoum reportedly stalled when Saudi Arabia barred President Bashir's plane from its airspace as the Sudanese leader flew to Tehran to attend Iranian President Hassan Rouhani's inauguration in August 2013, Crisis Group interview, Gulf Cooperation Council official, Riyadh, February 2018.

attacked the Saudi embassy in Tehran and consulate in Mashhad.³³ In the Saudi narrative, Sudan “started to realise the danger that Iran poses” and subsequently began “working with the GCC to stop Iranian expansion in Africa”.³⁴ Still, Riyadh remained concerned about Sudan’s fidelity as a partner, viewing Bashir as a transactional leader whose allegiance required constant upkeep in the form of diplomatic flattery and financial aid.³⁵ When it became clear Bashir’s grasp on Sudan was crumbling, Saudi Arabia and the UAE leapt at the chance to see Khartoum in more pliable hands; they gave their blessing to a military coup and subsequent transitional military council.³⁶ Djibouti and Somalia also cut ties with Tehran in 2016 after Iranian mobs stormed Saudi diplomatic missions in Iran.

With these successes, Saudi Arabia has increasingly come to see the Horn – and the entire continent – as another theatre in a global contest with Iran. Saudi officials say the U.S. “maximum pressure” campaign of economic sanctions has given them a window to squeeze Iran in any theatre where they can exert influence.³⁷ Senior Saudi policymakers cite Africa as one place where they are winning.³⁸

B. *Backing the Status Quo, Facing Resistance*

As it aims to curb Iranian influence, Saudi Arabia is extending its own presence in the Horn. Saudi policymakers finalised their first overseas basing agreement with Djibouti after two years of discussion in 2016 and 2017.³⁹ Although construction has yet to start, the agreement allows Riyadh to see itself as one of the arbiters of regional security.

The Kingdom prefers to work bilaterally in most cases and has ignored – if not intentionally sidelined – multilateral organisations such as the African Union (AU)

³³ Ahmed Feteiha and Michael Gunn, “Sudan Joining Saudi Campaign in Yemen Shows Shift in Region Ties”, Bloomberg, 27 March 2015. The 2016 attacks on Saudi missions in Tehran followed Saudi Arabia’s execution of Shiite cleric Nimr al-Nimr.

³⁴ Crisis Group interview, Saudi security analyst close to the government, Riyadh, October 2018.

³⁵ A Saudi diplomat said: “For now, Sudan is not in the Iran camp, but we have to be vigilant to make sure this remains the case”. Crisis Group interview, Washington, August 2018. In addition to benefitting from monetary support, Bashir became a frequent guest with prominent seating and access at major events in the Kingdom, for example during joint Arab military exercises, the annual pilgrimage to Mecca and summits of the Jeddah-based Organisation of Islamic Cooperation.

³⁶ A UAE foreign ministry official said: “We have no particular nostalgia for Bashir as a leader. He is transactional; he goes to Qatar when it is convenient and he goes to UAE/KSA when it is convenient. So we are not attached to his regime, but we do see it as important to make sure Sudan is stable and secure”. Crisis Group interview, Abu Dhabi, January 2019. Saudi Arabia and the UAE were the first donors to offer significant aid to Sudan’s transitional military council with a pledge of \$3 billion on 21 April 2019. The Saudi ambassador to Sudan said the funds would “support the Military Council endeavors aiming at strengthening the pillars of stability”. “We Will Do Our Best to Carry out Custodian of the Two Holy Mosques’ Directives to Serve Sudan, its People, Saudi Ambassador to Sudan says”, Saudi Press Agency, 22 April 2019.

³⁷ A senior Saudi official said: “Now is the time to push back ... We have assembled the strongest coalition ... to push back against Iran”. Crisis Group interview, Riyadh, March 2019.

³⁸ Crisis Group interviews, senior Saudi officials, Riyadh, March 2019. Sudan, Eritrea, Somalia and Djibouti have all cut or downgraded ties with Iran since 2015.

³⁹ John Aglionby and Simeon Kerr, “Djibouti finalizing deal for Saudi Arabian military base”, *Financial Times*, 17 January 2017.

and the Intergovernmental Authority on Development (IGAD).⁴⁰ But Saudi Arabia has worked closely with the UAE and Egypt in the Horn. The Saudis and Emiratis share a preference for cooperation with security states and often coordinate their efforts, for example by working together to broker a peace agreement between Ethiopia and Eritrea in 2018, and to jointly pledge \$3 billion in combined aid to Sudan's military-led transition in 2019.⁴¹

Riyadh likewise views Egypt's status quo, under President Abdel Fattah al-Sisi, as a cornerstone of regional stability. It has leaned on African allies to take Cairo's concerns seriously, for example on the distribution of Nile River waters.⁴² This alliance has not always been comfortable, however, and Cairo has been frustrated with what it views as Riyadh's attempts to overshadow its historical role in the Nile Basin. In 2018, Saudi Arabia announced the formation of a Red Sea Forum for Coastal States, an idea previously spearheaded by Egypt.⁴³ Riyadh and Cairo appear to have managed their leadership and policy differences, and had convened at least four meetings between them by mid-2019, discussing a wide agenda of topics, from security cooperation to coral reef protection and combatting human trafficking.⁴⁴ Yet this tussle for leadership will likely continue to cloud Saudi attempts to see forum mem-

⁴⁰ Crisis Group interviews, EU diplomat, Brussels, July 2019; AU official, Nairobi, October 2018.

⁴¹ Crisis Group Middle East Briefing N°65, *The United Arab Emirates in the Horn of Africa*, 6 November 2018; and Crisis Group Africa Statement, Sudan: Stopping a Spiral into Civil War, 7 June 2019.

⁴² For example, King Salman asked Ethiopia's Prime Minister Abiy Ahmed to pledge not to endanger Egypt's water security. Crisis Group interview, senior Saudi official, Riyadh, March 2019. Another Saudi analyst explained: "Egypt is central to the African context and also to the Arab context. If Egypt is happy, we are happy". Crisis Group interview, Riyadh, October 2018. See also Crisis Group Africa Report N°271, *Bridging the Gap in the Nile Rivers Dispute*, March 2019.

⁴³ Cairo and Riyadh are not always aligned. In the case of the Forum, diplomats describe tensions between the two capitals over how to shape the platform and who between them should lead. In Sudan, Egypt would have preferred a transition from Bashir guided more strongly by the Sudanese Armed Forces, with whose officers Cairo has deep ties, while the Saudis and the UAE in particular cultivated and empowered the Rapid Support Forces, whose generally ill-disciplined and lightly trained troops Egypt views with alarm. Complicating the picture, Saudi Arabia and the UAE are not always aligned in their Somalia policy. Egypt has sought to take the lead role in shaping relations with Somalia, for example, with its diplomats arguing in Riyadh and Abu Dhabi they have a greater experience in a region one Egyptian diplomat told Crisis Group "we are part and parcel of". Yet in recent months, the Saudis have adopted a more dovish attitude to President Farmajo's administration and sought to rebuild ties, while the Emiratis have stayed on the sidelines and continue to support Farmajo's adversaries in the federal member states. Both Saudi Arabia and the UAE are said to be supporting different candidates ahead of Somalia's pivotal presidential elections expected in 2021. Crisis Group interviews, Egyptian, Somali and European officials, Nairobi and Addis Ababa, June 2018-July 2019.

⁴⁴ The Forum is composed of Saudi Arabia, Yemen, Sudan, Djibouti, Egypt and Somalia. Eritrea has declined to join the group formally, preferring a bilateral relationship with the Kingdom. Crisis Group interviews, senior Saudi official, December 2018, and Eritrean diplomat, March 2019. Saudi officials say that Ethiopia, which has no Red Sea coast but has a significant interest in the waterway nonetheless, could join at a later stage, but Egyptian concerns have deferred this move. Addis Ababa has long sought to diminish Cairo's influence in the Horn. Crisis Group interview, senior Saudi official, Riyadh, March 2019.

bers agree on a constitution of principles that, if put into practice, would give Riyadh a leading role in the Red Sea's security architecture.⁴⁵

Meanwhile, after decades of funding Wahhabi mosques and scholars in the Horn, the Saudi government's religious organisation working outside its borders, the Muslim World League, has said it will pivot away from proselytising.⁴⁶ Even if this happens, the legacy of Saudi religious networks will persist, first, because former missionaries inculcated a strict version of Islam that sought to convert or persecute adherents to other interpretations or faiths. This dramatically transformed the social structure of many previously diverse Muslim communities. A senior Ethiopian analyst close to the government explained how difficult it would be to unwind this legacy: "The damage that KSA has done to this region is already done. It has torn the social fabric. And while the Saudis may have paused this for geopolitical reasons, I don't know if that applies to their scholars".⁴⁷ Second, the Muslim World League has limited control over private Saudi scholars, some of whom spread their views online.

Saudi Arabia faces other obstacles as it seeks to expand its regional reach. While several Horn states describe the Kingdom as a key partner, they are also wary about growing too close to a country that has backed Egypt's historical claims of regional leadership, spent decades spreading Wahhabi teachings, and demands loyalty in the intra-Gulf dispute.⁴⁸ Riyadh's support for military or other security states has alienated public opinion and may set the Kingdom up for future challenges.⁴⁹ And while Saudi Arabia has deep personal relationships, its institutional knowledge of local political dynamics is weak.⁵⁰

Developments in Sudan exemplify both the promise and peril of Saudi support to a country in transition. Since April 2019, Khartoum has once again been at the centre of Saudi Arabia's engagement with the Horn. At first glance, Riyadh's involvement has been, in the words of one senior official "a highly successful case" in which Saudi

⁴⁵ Beyond the Red Sea, Saudi Arabia intends to showcase its growing relationships in Africa with two planned summits in November 2019: one between Saudi and African leaders and another between the Arab League and African countries. Crisis Group interview, senior Saudi official, Riyadh, March 2019.

⁴⁶ Saudi clerics appointed under King Salman have indicated socially liberalising reforms at home will trickle into their approach overseas as well. The Muslim World League, the Kingdom's official international vehicle for projecting Islamic influence, for example, has refocused its message on promoting tolerance between religions as well as within Islam. In 2017, asked about past efforts to spread hardline Salafi views, Secretary General Mohammed al-Issa said: "We should not escape from the fact that there were mistakes, and then they were corrected. [...] It is our duty to face this extremism". See David Ignatius, "Are Saudi Arabia's reforms for real? A recent visit says yes", *Washington Post*, 1 March 2018. However, Saudi Arabia's religious scholarship is diverse and growing numbers of clerics rely on social media and informal tools to spread their messages; this gives them the ability to operate outside the state's direct purview, and they may not moderate their views as per official instructions. See, for example, Crisis Group Middle East Report N°200, *Addressing the Rise of Libya's Madkhali-Salafis*, 25 April 2019.

⁴⁷ Crisis Group interview, Addis Ababa, June 2019.

⁴⁸ Crisis Group interviews, AU official, Addis Ababa, March 2019; South Sudanese official, Addis Ababa, March 2019.

⁴⁹ For example, Sudanese protesters chanted slogans against Saudi and Emirati aid in April and May 2019. See Max Bearak and Kareem Fahim, "From Sudan's protesters, a warning to Saudi Arabia and the UAE: Don't meddle", *Washington Post*, 24 April 2019.

⁵⁰ Crisis Group interview, Saudi analyst, Riyadh, October 2018.

Arabia, the UAE, as well as the U.S. and UK were “strategically coordinating” and managed to use their influence to broker a deal between military leaders and civilian protesters.⁵¹ That agreement was signed to international fanfare on 17 August; if implemented, it offers a path to elections and civilian rule. Senior Saudi officials, including the point person for Africa, attended the signing in Khartoum and called the deal a victory for stability.⁵²

Yet this apparent good news masks a record of Saudi decisions showcasing the problematic nature of its policies. Riyadh has articulated two main priorities in Sudan: the need for “stability”, meaning in particular preserving the state’s security apparatus, and the importance of Sudan remaining in its sphere, allied with Saudi Arabia rather than rivals such as Iran, Qatar or Turkey.⁵³ While within reach, neither objective is guaranteed.

Early on, Saudi officials appear to have underestimated the complexity of the transition and their ability to influence it. Prior to the regime’s downfall, Saudi officials described Sudan’s protests as purely economically driven and expressed their hope that a combination of aid and gradual reform would quell them. One official anticipated: “The Sudanese people see the consequences of revolution and they don’t want those”.⁵⁴ This expectation may be one reason Riyadh did little to stop Bashir’s fall and, by some accounts, gave their blessing to his ouster.⁵⁵ Then, after the military ousted Bashir, Saudi Arabia and the UAE pledged their strong support for the country’s transitional military council. It is only under international pressure that they subsequently backed Ethiopian and AU efforts to broker a compromise between the generals and protesters; this is when they worked hand in hand with the U.S. and UK.

Far from engendering calm, the initial insistence on preserving the security apparatus – backed by Saudi Arabia – contributed to dangerous levels of violence and political uncertainty. Regional officials say that the Gulf’s \$3 billion aid pledge incentivised the military to drag their feet in negotiations with protesters and hold out for a deal where they could maintain control over key portfolios.⁵⁶ Then on 3 June, Sudan’s Rapid Support Forces, a quasi-private militia led by one of Saudi Arabia’s closest military allies, General Mohamed Hamdan Dagalo, or “Hemedti”, violently dispersed protesters and burned their encampments, leaving more than 100 dead and dozens more wounded.

The atrocities took place just days after Hemedti visited the Saudi Crown Prince, as well as leaders in Cairo and Abu Dhabi.⁵⁷ After the massacre, Riyadh lost substantial goodwill with many protesters but also AU diplomats, who concluded, rightly or wrongly, that the Saudis and Emiratis had offered the political cover that emboldened

⁵¹ Crisis Group interview, senior Saudi official, Jeddah, September 2019.

⁵² “Saudi Arabia Welcomes Sudan’s Transitional Agreement”, Saudi Embassy of Washington Press Release, 17 August 2019.

⁵³ “The Kingdom Welcomes all Sudanese Parties’ Agreement, Al-Jubeir states”, Saudi Press Agency, 17 August 2019.

⁵⁴ Crisis Group interview, senior Saudi official, Riyadh, March 2019.

⁵⁵ Khalid Abdelaziz, Michael Georgy and Maha El Dahan, Reuters, 3 July 2019.

⁵⁶ Crisis Group interview, senior UN official, Addis Ababa, June 2019. See also “Saudi Arabia, UAE provide USD 3 billion in assistance to Sudan”, Saudi Press Agency, 21 April 2019.

⁵⁷ Crisis Group Africa Statement, Sudan: Stopping a Spiral into Civil War, 7 June 2019.

security forces to use lethal violence. This also drew revulsion on the continent and elsewhere and led the AU to take a harder line against Khartoum military's actions.⁵⁸

The violence unleashed on 3 June raised the spectre of all-out civil war in Sudan. The RSF occupied the streets of Khartoum threatening a further crackdown if it were excluded from a political transition.⁵⁹ Saudi Arabia and the UAE both issued statements expressing alarm at the 3 June events, though only after calls to senior officials in both countries from U.S. Under-Secretary of State David Hale.⁶⁰ By several accounts, Saudi policymakers were frustrated by their inability to contain the situation. In a meeting with visiting diplomats in July, one senior Saudi official reportedly explained: "We want a strong military, not stupid actions".⁶¹ Riyadh instead found itself with the worst of both worlds: facing a public perception that it controlled its allies, but signally failing in that effort.

Indeed, Saudi Arabia's support for the military may have won it short-term influence with the country's transitional leaders but has tarnished its image in Sudan.⁶² This may undermine its second objective: to retain Khartoum firmly in its sphere of influence. Perceived Saudi and Emirati meddling risks stirring popular opposition, including from Islamists who would find ready support from regional rivals Qatar and Turkey; Iranian media has also demonised Saudi Arabia's role in Sudan.⁶³ Negative sentiment toward Saudi Arabia and the UAE is palpable in Khartoum, reflected in an ongoing campaign led by some of the uprising's initial protesters to see Sudan exit the Arab League after the body, like Riyadh and Abu Dhabi, was seen to back the military.⁶⁴ In other words, maintaining a friendly government in Khartoum is likely to be as arduous and costly an affair as it proved to be during Bashir's time.

⁵⁸ Crisis Group interviews, African and European diplomats, Nairobi and Addis Ababa, July 2019.

⁵⁹ Crisis Group Africa Statement, Sudan: Stopping a Spiral into Civil War, 7 June 2019.

⁶⁰ "KSA follows with great concern the developments in the brotherly Republic of Sudan", Saudi Press Agency, 5 June 2019; "UAE following developments in Sudan with great concern", Emirates News Agency, 6 June 2019; "Under Secretary Hale's Call With Saudi Deputy Defense Minister Khalid bin Salman", Readout from U.S. State Department Office of the Spokesperson, 4 June 2019; "Under Secretary Hale's Call With Minister of State for Foreign Affairs Anwar Gargash of the United Arab Emirates", Readout from U.S. State Department Office of the Spokesperson, 6 June 2019.

⁶¹ Crisis Group interview, diplomat, July 2019.

⁶² Throughout the protests, chants, slogans and political cartoons frequently described a desire to rid Sudan of Saudi and Emirati funds and influence. Protesters often depicted these two Gulf countries as their nemesis.

⁶³ Officials in Sudan's transitional government have raised concerns to Western diplomats that Qatar may seek to support opposition forces or armed groups, leveraging the groundswell of negative sentiment among some in Sudan toward Saudi Arabia and the UAE. Crisis Group interview, senior Western diplomat, September 2019. For an example of Iranian commentary on Sudan, see Press TV video, "Sudan crackdown with 'Saudi green light'", 6 June 2019, at twitter.com/i/status/1136715638343372800.

⁶⁴ The campaign has inspired an array of street art and social media. See, for example, Twitter at twitter.com/search?q=%23sudaxit&src=typed_query.

III. The UAE: Squeezing Out Islamists and Their Backers

The UAE has emerged as the most assertive Gulf power in the Horn, driven in part by a belief that advancing its interests in the region is essential to maintaining calm at home.⁶⁵ Abu Dhabi views both Islamist movements and Iran as threats to its rule and its vision for the region. Islamism, Abu Dhabi argues, is an inherently destabilising ideology that seeks to uproot existing governments and social structures; it paints with a very broad brush, making little if any distinction among Islamists, whether the Muslim Brotherhood, al-Qaeda, Islamic State or Boko Haram.⁶⁶ Using hard and soft power, Abu Dhabi seeks to support strong governments that can suppress these movements, even if this means bottling grievances that might later erupt.⁶⁷ A senior Emirati official said:

What we worry about is a sweep of ideology in our region's governance. We are worried about the Muslim Brotherhood and their threat to the neighbourhood. ... This, married with poor institutions and poverty, is very dangerous. ... The region is not in a good place, and I don't think anyone else will confront it. It's the calling of our time to overcome this regional situation.⁶⁸

A. A High-stakes History

The UAE's current role in the Red Sea corridor dates to 2006, when DP World – a majority Dubai government owned company – won a 50-year concession to upgrade and operate Djibouti's Doraleh port. The company saw the port as a chance to prove itself in the global ports market and the contract revealed the Horn's underdeveloped shores as a commercial opportunity.⁶⁹ Several years later, piracy emerged as a major threat off the coast of Somalia, which sits along the main shipping route from the Gulf of Aden to the Red Sea. To secure its oil and other shipments, the UAE joined international efforts to patrol the waterway.⁷⁰ This was the first data point in an emerging view that instability on either coast of the Red Sea could reverberate across the Arabian Peninsula.

In the decade since the 2011 Arab uprisings, both the political and economic importance of the Red Sea corridor to the UAE expanded. The UAE, like Saudi Arabia,

⁶⁵ A foreign ministry official presented it as follows: "Your prosperity as a country depends on the security of your region. It depends on your neighbours, not only yourself. For us, stability in the Horn of Africa is very important. This is our main priority in the region". Crisis Group interview, Abu Dhabi, June 2018.

⁶⁶ A senior official explained: "One of the main reasons we are interested [in the Horn of Africa] is that we believe there is a connectivity in this fight. These are all the same groups, being affected by the same narrative". Crisis Group interview, Abu Dhabi, April 2018. The UAE claims that Sunni Muslim groups such as al-Qaeda and the Muslim Brotherhood, on one hand, and the Iranian regime, on the other, are similarly dangerous as they espouse theocracy and propagate Islamist ideologies beyond national borders.

⁶⁷ The UAE has cracked down on domestic supporters of the Islamist group al-Islah since 2011, and dozens of alleged members of the Emirati Islah remain in detention. See, for example, Human Rights Watch, "UAE: Prisoners held after sentences served", 9 July 2019.

⁶⁸ Crisis Group interview, Abu Dhabi, June 2019.

⁶⁹ Crisis Group phone interview, DP World official, September 2018.

⁷⁰ Crisis Group Briefing, *The UAE in the Horn of Africa*, op. cit.

watched the region's political turmoil with trepidation, particularly when groups associated with the Muslim Brotherhood initially emerged as winners. In 2013, the UAE strongly backed then-General Abdel Fattah al-Sisi's coup to unseat President Mohamed Morsi and the subsequent crackdown on the Muslim Brotherhood in Egypt; a year later it provided assistance to anti-Islamist forces in neighbouring Libya. Alarmed that the Horn was both vulnerable to and a possible source of Islamist ideology, the UAE focused attention there too. In Somalia, Abu Dhabi evolved its anti-piracy operations to include this new mission, countering what Emirati officials described as "terrorism and al-Shabab" operating mainly from Puntland and Mogadishu.⁷¹

The Yemen war in 2015 sharpened Emirati concerns about Islamist groups and offered a battlefield in which to push back. Emirati forces operated in Yemen's south and west, including along the Red Sea coast and at Bab al-Mandab. The UAE split its attention between fighting Huthi rebels and al-Qaeda in the Arabian Peninsula and, later, al-Islah, often described as Yemen's Muslim Brotherhood. After King Salman signed a Gulf Cooperation Council (GCC) base agreement with Eritrea in 2015, the UAE leased the base and built an airstrip. The UAE secured a subsequent base agreement in Berbera, Somaliland, as a backup plan to ensure its troops and assets would have a staging ground for the Yemen theatre.⁷²

Since 2011, Abu Dhabi also came to equate Qatari influence with the risk of political unrest and the rise of Islamism, a view based on Doha's backing for the Muslim Brotherhood.⁷³ Accelerating with the 2017 Gulf crisis, the UAE has sought to box out Qatar from the Horn.⁷⁴ Abu Dhabi has invested heavily in elevating existing relationships and cultivating friendly new partners, notably Ethiopia, Sudan's transitional military government, Eritrea and Somaliland.

B. *Keeping the Status Quo, Managing Change*

The UAE supports the political status quo in the region but when instability arises, it prefers what it refers to as "managed" transitions that leave a country's security apparatus and executive institutions intact in order to prevent revolutionary change or processes through which Islamists might come to power.⁷⁵

The experiences of the 2011 Arab uprising in Egypt and the UAE's altercation with Qatar in Somalia weigh heavily on how Abu Dhabi builds relationships. In both cases, Emirati policymakers thought that their interests were secure, only to see them quickly crumble. Former Egyptian President Hosni Mubarak had kept the Egyptian

⁷¹ Crisis Group interview, UAE official, Abu Dhabi, May 2018. See also "UAE, Somalia sign military cooperation agreement", KUNA, 7 November 2017.

⁷² Crisis Group interview, senior UAE official, Abu Dhabi, March 2018. On 14 September 2019, Somaliland's President Muse Bihi Abdi said the UAE military facility in Berbera, a planned Air Force base, would become a civilian airport. UAE officials had not confirmed this change at the time of publication, but the decision would coincide with an Emirati drawdown in Yemen that has reduced the immediate need for a second airstrip in the Horn of Africa. See "Somaliland UAE base to be turned into civilian airport", *Reuters*, 15 Sept 2019.

⁷³ An Emirati official offered a typical summary of the thinking: "Qatar's agenda is to disturb and destabilise". Crisis Group interview, May 2018.

⁷⁴ Crisis Group interview, senior UAE official, Dubai, April 2019.

⁷⁵ An Emirati foreign ministry official said: "Evolution can be very positive. I think revolution in our region hasn't been shown to be a positive way forward". Crisis Group interview, Abu Dhabi, April 2019.

Brotherhood in check until his swift downfall in 2011. Abu Dhabi had invested heavily in a security partnership with Mogadishu that unravelled in a matter of weeks in 2018. The lessons the UAE drew from these events were to diversify its allies and retain their loyalty.⁷⁶ It therefore tries to set a decisive footprint so others cannot. As an official put it: “We have learned that others will meddle if we are not there”.⁷⁷

The UAE has also sought to capitalise on unexpected political changes. In Ethiopia, Crown Prince Mohammed bin Zayed moved quickly to establish a personal relationship with Prime Minister Abiy Ahmed after the latter took office in April 2018. The UAE saw Abiy as a likeminded leader with a vision for transforming Ethiopia's economy and regional stature, often through little more than sheer force of personality.⁷⁸ Abu Dhabi also saw potential business opportunities in real estate, infrastructure, logistics, energy, telecommunications and air travel, some linked to Abiy's promised privatisation plans. UAE support to Abiy was personalised and highly visible. In June and July 2018, the Emirates Red Crescent dispatched multiple aid delegations to ask Abiy what his personal funding priorities were.⁷⁹ The UAE is refurbishing the prime minister's residence in Addis Ababa and, according to some accounts, has provided his office with a fleet of cars.⁸⁰

In Sudan, the UAE reportedly gave its blessing to the ouster of President Bashir and joined Saudi Arabia in backing the transitional military council that took power.⁸¹ Abu Dhabi had never trusted Bashir and viewed him as inextricably connected to the Islamist movement that initially brought him to power.⁸² With his fall, Emirati officials were outspoken in staking out their interests, which they presented as follows:

Having lived through ten years of chaos and turbulence [in the region], the UAE understands the importance of stability and the necessity of institutions and peaceful transitions. [...] After years of Muslim Brotherhood dictatorship, today [Sudan is] in need of support to stabilise. But the choice of institutions and the speed of change, these are Sudanese affairs. [...] It is our duty to emphasise the importance of equilibrium between stability and change.⁸³

Where it has failed to establish strong relations or lost ground to rivals, Abu Dhabi has attempted to isolate and undermine those it cannot bring to its side. In Somalia, for example, the UAE ruled out working with President Mohamed Abdullahi Mohamed (Farmajo) and has instead crippled his ability to reconcile with and govern federal member states. Abu Dhabi has invested, given aid to and hosted the leaders of Somalia's regional governments, thereby allowing them to subsist and operate without Mog-

⁷⁶ Crisis Group Briefing, *The UAE in the Horn of Africa*, op. cit.

⁷⁷ Crisis Group interview, UAE foreign ministry official, Abu Dhabi, April 2019.

⁷⁸ Crisis Group interview, Emirati analyst close to government, Abu Dhabi, July 2018.

⁷⁹ Crisis Group interview, senior Emirates Red Crescent official, Abu Dhabi, July 2018.

⁸⁰ An Ethiopian analyst said: “These things [visibly] demonstrate their influence.” Crisis Group interview, Addis Ababa, June 2019.

⁸¹ Khalid Abdelaziz, Michael Georgy and Maha El Dahan, Reuters, 3 July 2019.

⁸² A UAE foreign ministry official said: “Any help that we give to Sudan is not because of the regime but because of the importance of Sudan. And we give this aid knowing it is Panadol – it doesn't fix the problem, but at least it makes the pain go away for a while”. Crisis Group interview, Abu Dhabi, January 2019.

⁸³ UAE State Minister for Foreign Affairs Anwar Gargash, comments to media, May 2019.

adishu. This approach preserves Emirati agreements to build ports in Berbera and Bosaso, but has been a devastating blow to years of international efforts to reconcile Somalia's centre and periphery, although Farmajo's own imperious approach and attempts to oust rivals in the federal member states has contributed to the impasse.⁸⁴

The UAE's security goals reinforce its economic aspirations to be a key player in shipping and trade across the broader region. The UAE has increased its exports to the Horn in recent years, even surpassing China in Somalia and Eritrea.⁸⁵ It hopes that new ports, particularly in Berbera and potentially Assab, could benefit from growing consumer demand linked to Ethiopia's high rates of economic growth.⁸⁶ Abu Dhabi has also gone furthest among regional states in seeking direct cooperation with Beijing's BRI in the Horn. The UAE has floated trilateral investment arrangements that would make joint use of Chinese and Emirati funding in Africa.⁸⁷ These would improve its access to new business opportunities. An Emirati economic official said:

We have a type of fish in the UAE that has the ability to stick to things, for example, to bigger fish. This is a survival mechanism because it uses this to find food and to stay safe. This is how the UAE is with China: if we stick to them, they can lead us to new opportunities.⁸⁸

Or, as another official put it: "We have our own belt and road initiative; now we want to connect it with China's".⁸⁹

C. *A Mix of Hard and Soft Power*

The UAE is unique among Gulf states in its ability to use hard power in the Horn. Abu Dhabi has concluded agreements to build and operate military bases in Assab (Eritrea) and Berbera (Somaliland), though the latter may now be converted to a civilian facility.⁹⁰ Dubai-based DP World and its subsidiary P&O Ports are developing

⁸⁴ An Emirati foreign ministry official said: "We do not want this government in Mogadishu to collapse, but we also do not want anything to do with this government. We will stay in Somaliland and Puntland and continue to support them". Crisis Group interview, Abu Dhabi, October 2018. This approach differs from Saudi Arabia's, which has engaged with Farmajo's government and sought to convince Mogadishu that Qatar does not have its interests at heart. See Crisis Group Africa Report N°280, *Somalia-Somaliland: The Perils of Delaying New Talks*, 12 July 2019.

⁸⁵ In 2017, the UAE's exports to Somalia were \$781 million and to Eritrea they were \$76 million, compared to Chinese exports to Somalia of \$473 million and to Eritrea of \$42 million. Note that these figures include re-exports (exports of foreign goods in the same state as previously imported) and thus emphasize direct trade flows over indirect flows such as Chinese goods shipped to UAE for onward delivery in the Horn. UN Comtrade data, at <https://comtrade.un.org/data>.

⁸⁶ Crisis Group interview, UAE foreign ministry official, Abu Dhabi, July 2018.

⁸⁷ A Chinese analyst said: "The UAE has also been very enthusiastic about BRI, and they are offering to do joint third-country investments, for example, in Africa and in Asia. This is very interesting for China". Crisis Group interview, Abu Dhabi, February 2019. Many BRI investments are not currently profitable for the Chinese firms involved, and projects are operating at a loss. Trilateral financing may help bridge this funding gap. Crisis Group interviews, Chinese economic analyst and Asian diplomat, February 2019.

⁸⁸ Crisis Group interview, UAE economic official, Abu Dhabi, April 2019.

⁸⁹ UAE official's talking points shared with Crisis Group, April 2019.

⁹⁰ Somaliland's president indicated on 14 September that the UAE would use the airport they were constructing at Berbera for civilian purposes. This could, for example, become a part of the larger

commercial ports in Berbera and Bosaso (Puntland), respectively. Both UAE- and Saudi-based companies have expressed interest privately in developing Eritrea's As-sab and Massawa ports.⁹¹ While these deals operate on commercial terms, the UAE military has also used DP World-run facilities on a limited ad hoc basis in the past.⁹²

Less visibly, the UAE has dangled military training as a carrot for allies, using a curriculum built on experience from its deployments in Afghanistan, Yemen and Somalia.⁹³ The UAE's first training mission in Africa built the Puntland Maritime Police beginning in 2014. Although Western allies describe it as one of the few effective military forces in Somalia, this force, and UAE-trained soldiers in Mogadishu, also appear to fight domestic political and ideological enemies at times.⁹⁴

Simultaneously, the UAE is selling a soft-power narrative that its own economic success in a turbulent Middle East is replicable in the Horn, though no regional state has financial resources comparable to Abu Dhabi's. This is both a political and economic message: politically, states should avoid succumbing to Islamism. Economically, the UAE stands ready to provide financial aid and investment while states open or privatise parts of their economies, as Ethiopia has done.⁹⁵

The UAE has several levers to encourage private and semi-state-owned companies to invest in riskier economies. For example, the foreign ministry has recently started prioritising bilateral investment agreements that ensure investors can repatriate their money regardless of national currency controls.⁹⁶ The government advises

development of the UAE-supported Berbera corridor stretching from Ethiopia's border to the DP World-run Berbera port. See Muse Bihi Abdi comments to media, 14 Sept 2019, video at twitter.com/Magdashi3/status/1172828154517438464?s=19.

⁹¹ Crisis Group interviews, Eritrean diplomat, March 2019; private sector source, Dubai, February 2019.

⁹² Crisis Group interview, UAE official, Abu Dhabi, October 2018. Although DP World is often seen as an arm of Emirati foreign policy, its relationship to the government is more a marriage of mutual convenience. Dubai-run DP World tends to operate in states where the UAE has established strong relations, and likewise, the port operator is often a carrot for securing stronger ties. In practice, however, DP World operates in parallel and not always in direct coordination with Emirati foreign policy. Disagreements occur occasionally: for example, in Somalia, the company has at times had tense relations with local governments in Puntland, despite Abu Dhabi maintaining excellent ties. DP World has also made public statements in support of Somaliland statehood whereas Abu Dhabi has stopped short of openly calling for an end to its "One Somalia" policy. Crisis Group interviews, private sector source, Dubai, 2018 and 2019; and UAE foreign ministry officials, Abu Dhabi, 2018 and 2019.

⁹³ Crisis Group interview, UAE senior official, February 2019.

⁹⁴ Crisis Group interview, U.S. official, Washington, August 2018. In one example, UAE-trained Somali forces orchestrated a 30 December 2017 raid on Somali Senator Abdi Hasan Awale Qeybdiid's compound, apparently without the government's knowledge, leading President Farmajo to open an investigation. Emirati officials say the raid took place after a false intelligence tip-off. Regardless, the incident exposed fragmentation in chain of command within Somalia's security forces. See Crisis Group Report, *Somalia and the Gulf Crisis*, op. cit.

⁹⁵ The UAE's Central Bank transfer of \$1 billion to Ethiopia in June 2018 was intended to ease pressure on the country's foreign currency reserves and give space to the prime minister's privatisation plans and broader economic reform agenda aimed at attracting foreign investment.

⁹⁶ For example, the UAE signed a bilateral investment agreement with Ethiopia in 2018. This is important to private firms because many companies in Ethiopia face limits on how much foreign currency they can take out of the country, depending on availability in the Central Bank. In the case of Ethiopia, Abu Dhabi's strategic investment company Mubadala is also considering a non-dollar-

the private sector about which countries it considers unfit for Emirati investment. Finally, the UAE at times offers to guarantee a portion of a private company's loans or transactions to encourage them to take risks.⁹⁷

D. *Whose Definition of Stability?*

The UAE's engagement in the Horn may have won it new friends, but it also has produced enemies and significant negative public sentiment. Among impressions now commonly held among many in the Horn are that the UAE is extracting more from its relationships than it is providing and that the UAE's growing military presence and self-interested policy goals will bring new instability to a fragile region.⁹⁸

The experience of Djibouti's Doraleh in particular clouds the UAE's reputation. In 2012, Djibouti accused DP World of bribery in securing the government contract, leading to a long legal battle that culminated in Djibouti nationalising the port in 2018. Djibouti additionally argued that the contract was disproportionately profitable for DP World.⁹⁹ The government also accused DP World of limiting container traffic to reduce competition with Dubai's Jebel Ali port.¹⁰⁰ Although DP World won several subsequent international arbitrations over Doraleh, the narrative of an extractive-rich country seeking a quick profit stuck. Today, many diplomats, officials and scholars from the Horn view Emirati port contracts as a means to keep the region down and prevent competition with Dubai; DP World strongly denies this allegation.¹⁰¹

Other partners in the Horn worry the UAE's military relationships could draw the region into conflicts; they point to the example of Sudanese troops serving in costly, front-line combat roles in Yemen where they have taken disproportionate casualties.¹⁰² A growing number of African officials have begun speaking out about the need to end

denominated investment vehicle that could sidestep currency controls limiting the amounts companies can repatriate from Ethiopia. Crisis Group interviews, Ethiopia Investment Commission official, Addis Ababa, March 2019; and economic analyst, Abu Dhabi, June 2019.

⁹⁷ Crisis Group interview, UAE economic official, Abu Dhabi, April 2019.

⁹⁸ Crisis Group interviews, UN and AU officials, Addis Ababa, March and June 2019.

⁹⁹ For example, a contract lawyer with knowledge of the case explained that Djibouti's shares in the project were based on net profits, which incentivised DP World to raise costs and limit the royalties paid to Djibouti. However, DP World's fees were calculated on a gross-profit scale, meaning they would benefit regardless of the cost-to-income ratio. Crisis Group interview, September 2018.

¹⁰⁰ A Djiboutian diplomat said: "Emirati ports are far from Red Sea shipping routes. So for them, controlling Yemeni and Djiboutian ports would be a way to block those two ports [from taking business away] from Dubai". Crisis Group interview, March 2019.

¹⁰¹ For example, a senior AU official said: "The UAE is acquiring ports not to develop them but to take control of the whole area" and limit competition. Crisis Group interview, Addis Ababa, June 2019. Crisis Group phone interview, DP World official, September 2018.

¹⁰² Sudan has an estimated 10,000 forces operating in Yemen, managed and paid by the UAE. These forces largely operate on Yemen's Red Sea coast, guarding supply lines and holding force protection positions. Crisis Group interviews, UAE diplomat, June 2018; and UAE security sources, May and June 2019. Reflecting a common sentiment, a senior AU official said: "The militarisation of the area is bad news for us as Africans. It will complicate our lives". Crisis Group interview, Addis Ababa, June 2019. According to some accounts, the Saudi-led coalition has deployed troops from the conventional Sudanese Armed Forces along the Saudi-Yemeni border while they have sent RSF soldiers to front-line positions, including around the port city of Hodeida. As a result, RSF forces have suffered significant casualties. Crisis Group interview, Western diplomat with good access in Khartoum, August 2019.

Sudan and Eritrea's roles in supporting the Saudi-led coalition in the Yemen war, the world's largest humanitarian emergency and a source of tens of thousands of refugees arriving to the Horn's shores, including in Djibouti and Somalia.¹⁰³

Sudan's involvement in Yemen has also complicated politics back home. The RSF has gained enormous domestic financial power – and hence the ability to co-opt political factions – from its foreign operations. These funds have facilitated the rise of its leader, General Mohamed Hamdan Dagalo “Hemedti”, who has played an out-sized role in Sudan's political transition, something that its Emirati backers laud.¹⁰⁴

For many in the Horn, the UAE's professed goal of maintaining stability thus portends a scenario similar to Abu Dhabi's other ally, Egypt, where the government has employed violent repression to quash its political opponents. A UN official expressed a common reaction: “Stable? What is stable for them? They want the Brotherhood out of this region”.¹⁰⁵

¹⁰³ Crisis Group interviews, AU and UN officials, Nairobi, September 2018. The UN Refugee Agency estimates that Djibouti hosted roughly 30,000 Yemeni refugees as of January 2019. “Djibouti Fact Sheet”, UNHCR, January 2019.

¹⁰⁴ A UAE official said: “When the RSF took control of the streets of Khartoum, really they had to do this. The security situation would have deteriorated a lot if they hadn't. ... We can't ignore the importance of the presence of the RSF to ensure security”. Crisis Group interview, Abu Dhabi, July 2019.

¹⁰⁵ Crisis Group interview, UN official, Addis Ababa, June 2019.

IV. Qatar: Trying to Outmanoeuvre Saudi Arabia and the UAE

Qatar's push into the Horn began in the mid-2000s but has accelerated since 2017, when Saudi Arabia, the UAE, Egypt and Bahrain cut diplomatic ties. Doha sees the continent as fertile ground for new relationships and investments that can bolster its diplomatic and economic position while under blockade. As a senior Qatari official put it: "If you have more friends, then more friends are upset when something happens to you. [...] When I have strong partnerships, nobody can mess with me – I am protected".¹⁰⁶ Where possible, Doha aims to outmanoeuvre rival Gulf states and capitalise on their mistakes.

A. *A History of Conflict Mediation*

Qatar's activist regional policy dates to Emir Hamad bin Khalifa al-Thani's rise to power in 1995. The new leader sought to carve out a role distinct from and at times adversarial to regional giant Saudi Arabia. A decade later, Qatar's lack of historical baggage in the Horn became an unexpected advantage, allowing Doha to build a profile as an unbiased mediator. In 2008, the Arab League designated Qatar as mediator in Sudan's Darfur conflict, culminating in the 2011 signing of the Doha Agreements.¹⁰⁷ Doha also brokered an understanding between Eritrea and Djibouti over a border dispute beginning in 2010.¹⁰⁸ Throughout these negotiations, Qatar grew a network of valuable contacts both in local governments and opposition movements, as well as in multilateral institutions and other states.

Qatar's stock rose further with the 2006 launch of Al-Jazeera English. Within a few years, the channel's Africa coverage far surpassed existing outlets in breadth and resources, bringing a Qatari perspective into the African mainstream. Growing diasporas from the Horn in Doha reinforced the country's positive image back on the continent.

During this time, Qatar also expanded its political networks across the Middle East and North Africa, notably among local iterations of the Muslim Brotherhood.¹⁰⁹ The 2011 Arab uprisings reshaped Qatar's regional position. Doha and its state-funded media platforms were widely supportive of popular uprisings and Islamist movements

¹⁰⁶ Crisis Group interview, senior Qatari official, Doha, December 2018.

¹⁰⁷ Simultaneous to these efforts in the Horn, Qatar was also involved in mediating conflicts in Yemen, Afghanistan, Libya and elsewhere. For more on this history of Qatari mediation, see Sultan Barakat, "Qatari Mediation: Between Ambition and Achievement", Brookings Doha Institution, 2014.

¹⁰⁸ "Qatar to mediate between Djibouti and Eritrea on border dispute", *Sudan Tribune*, 9 June 2010.

¹⁰⁹ Analysts disagree about the rationale and ideological underpinning (or lack thereof) for Qatar's historical engagement with and support to Islamist groups. Some see Doha as an ideological proponent of Islamist groups; others view Qatar's relationships as a simple matter of pragmatism – that for a small country with limited human capacity, plugging into one of the region's largest organised social movements represented a phenomenal opportunity to punch above its weight. See David Roberts, "Reflecting on Qatar's 'Islamist' Soft Power", Brookings Institution, April 2019.

in Egypt, Tunisia, Libya and Syria. Taking sides shattered the country's image of neutrality in the Middle East and disrupted its role as a conflict mediator.¹¹⁰

Qatar grappled with how to reposition itself throughout the middle of the decade, but may have found a way forward since the Gulf dispute erupted in 2017. The crisis offered Qatar a chance to capitalise on its outsider profile and broaden its foreign policy priorities to include a more intensive focus on Africa, Eastern Europe, Russia and China. Doha's status in Africa was precarious in the immediate aftermath of the Gulf crisis: at least eight African countries downgraded ties in favour of the Saudi bloc.¹¹¹ In response, since 2017 Qatar has opened several new embassies on the continent, its Emir visited West Africa for the first time, and Doha has hosted several East African leaders.

B. *Evading the Saudi-led Blockade*

Qatar's new relationships in Africa are partly its way of evading the blockade imposed by Saudi Arabia and its allies in June 2017 – both for immediate, practical reasons and broader strategic ones. When the Gulf spat began, Qatar was importing some 80 per cent of its food and 20 per cent of its total imports (by value) from its Gulf neighbours; the blockade forced it to rethink its vital supply chains.¹¹² Sudan and Ethiopia offered the promise of arable land that could boost food security in the medium term. The Horn of Africa was also a place to claim back allies lost to the Saudi-UAE bloc in the immediate aftermath of the crisis, and in doing so, exact a strategic cost on its rivals. An analyst close to the government said: "Qatar's policy in Africa is to take revenge indirectly" for the blockade.¹¹³ Finally, Qatar came to see the Horn as a significant opportunity to benefit from expected economic growth and the evolving security landscape of the Red Sea corridor.¹¹⁴

Qatari officials deny competing with regional rivals in the Horn. "Qatar will never be part of regional competition", said a senior Qatari diplomat.¹¹⁵ But in building new relationships, Doha is limiting its rivals' ability to consolidate influence. Qatar successfully rolled back its diplomatic isolation in much of the continent. In Somalia, where it laid the most significant footprint, Doha has made itself indispensable to the federal government.¹¹⁶ Djibouti keeps channels open; the Ethiopian prime min-

¹¹⁰ A Qatar-based academic said: "Countries see that Doha is not neutral anymore. Qatar's actions in the Arab Spring have [negatively] impacted its soft power". Crisis Group interview, Doha, November 2019.

¹¹¹ Jihad Dillon, "Qatar's quest for African influence", *The Africa Report*, 30 April 2019.

¹¹² "Quarterly Bulletin on Foreign Merchandise Trade Statistic", Qatar Ministry of Development Planning and Statistics, Q1 2017; see also Kristian Ulrichsen, "How Qatar Weathered the Gulf Crisis", *Foreign Affairs*, 11 June 2018.

¹¹³ Crisis Group interview, Qatar-based analyst on Africa close to the government, Doha, November 2019.

¹¹⁴ A Qatar-based media analyst close to government said: "Qatar has found in this crisis that their diplomacy can be very effective. It can open up to different powers. It can create a better balance of relations". Crisis Group interview, Doha, November 2018. A Qatar foreign ministry official said: "The Horn of Africa is of great importance to Qatar. What happens in the Horn of Africa affects us and vice-versa". Crisis Group interviews, Doha, November 2018.

¹¹⁵ Crisis Group interview, senior Qatari diplomat, Doha, November 2018.

¹¹⁶ Crisis Group Africa Briefing N°260, *Somalia and the Gulf Crisis*, 5 June 2018.

ister visited Doha in March.¹¹⁷ According to a senior Qatari official: “We used to be blocked in some countries, because of Saudi Arabia’s influence there. But now we can pick and choose our partners”.¹¹⁸

Sudan now poses a challenge to Qatar’s position in the Horn, however. Qatar had been a close ally of Bashir and often hosted Islamist leaders from both inside and outside of Sudan’s ruling party.¹¹⁹ Qatari officials say that they sought to find a graceful exit for Bashir and blame Saudi Arabia and the UAE for interrupting those efforts through a military coup.¹²⁰ A senior official said: “It is clear that the UAE and Saudi Arabia are trying to push us out. They blocked some of our attempts to reach out to the [transitional military council]”.¹²¹ Doha will seek to maintain its investments, including business ties and a training program for the Sudanese military; it likewise maintains ties with some factions among protesters.¹²² Facing a clear threat to its longstanding influence, Qatar has used its media to resurrect a pro-revolutionary narrative that was common during the 2011 Arab uprisings. Qatari officials argue that suppressing protests engenders deeper turmoil, a view that puts Doha in direct opposition to Riyadh and Abu Dhabi.¹²³

C. Trade, Aid and Cash

Qatar’s diplomatic toolkit in the Horn ranges from significant investments and aid to establishing media platforms and direct air links.¹²⁴ Its leadership solidified the connection between foreign policy and economics in November 2018 when it named Foreign Minister Sheikh Mohammed bin Abdulrahman al-Thani additionally as chair of the Qatar Investment Authority, the country’s sovereign wealth fund. A senior official explained: “Foreign policy and funding cannot remain separate. Joining them gives us more leverage to become engaged. If the foreign minister goes somewhere, he can come with the wealth fund”.¹²⁵ Qatar also reactivated its Development Fund in 2018, boosting staff from just three to 50 and more than tripling the budget in a matter of months.¹²⁶

¹¹⁷ Crisis Group interview, Djibouti diplomat, March 2019. See also Khalid Abdelaziz, Michael Georgy and Maha El Dahan, “Abandoned by the UAE, Sudan’s Bashir was destined to fall”, Reuters, 3 July 2019; and “Chad and Qatar restore ties cut in wake of Arab states rift”, Reuters, 21 February 2018.

¹¹⁸ Crisis Group interview, senior Qatari official, Doha, December 2018. This claim is difficult to assess. While Qatar has been able to increase investment in Ethiopia since 2017, it has limited ties with other Saudi and UAE allies such as Eritrea, Djibouti and the regional government of Somaliland.

¹¹⁹ Among the frequent guests in Doha was Hassan Turabi, founder of Sudan’s National Islamic Front, which initially was part of Bashir’s government but later went into opposition.

¹²⁰ Crisis Group interview, senior Qatari official, July 2019.

¹²¹ Crisis Group interview, senior Qatari official, July 2019.

¹²² Ibid.

¹²³ “Qatar foreign minister critical of Saudi, UAE effort to impose ‘stability’ on region”, *Middle East Eye*, 9 June 2019.

¹²⁴ Qatar Airways was operating 27 flights to destinations in Africa as of July 2019. Turkish Airlines operates 52 routes to Africa, while Emirates Airlines operates 22.

¹²⁵ Crisis Group interview, senior Qatari official, Doha, December 2018.

¹²⁶ Crisis Group interview, Qatari Development Fund official, Doha, May 2018. One impetus for the initial growth was a \$200 million grant pledged to Somalia in late 2017 largely intended to finance the construction of two key roads and several government buildings in and around Mogadishu.

In Africa as in the Middle East, Qatar has aligned itself with Turkey. When Doha began carving out influence in Mogadishu, it sought Turkish advice and signalled political alignment.¹²⁷ Qatari officials say they hope that their local companies can emulate Turkish contractors and bid for more commercial projects, particularly for building roads and other infrastructure.¹²⁸

Despite a major push into Africa in the last two years, Doha remains a very limited investor and trade partner in the Horn compared with its Gulf peers and Turkey.¹²⁹ Qatar's economic positioning in the Red Sea basin will also have a bearing on its efforts to seek what it describes as "cooperation and complementarity" with China's Belt and Road Initiative, according to a Qatari member of the Silk Road engagement team, a group set up to formulate policy toward the initiative.¹³⁰ Although cooperation will begin from a low base, it has become a political priority. When Emir Sheikh Tamim bin Hamad al-Thani visited Beijing on 31 January 2019, the two countries agreed to "synergise their development strategies and jointly build the Belt and Road Initiative".¹³¹

Soft power via Al-Jazeera and other media is equally if not more important to building Qatari influence. These outlets have capitalised on the blockade to win sympathy and popular support.¹³² Qatari media have also seized upon rivals' mistakes. In Somalia, for example, Al-Jazeera highlighted the fallout from the UAE's decision to close a hospital it was running, amid a dispute with the Mogadishu government.¹³³ Al-Jazeera also closely covered the Sudanese protests that unseated President Omar al-Bashir in April 2019, and provided highly critical coverage of Saudi and Emirati support to the transitional military council.¹³⁴ Qatari media are also useful as a means to offer a global platform for local allies, while Qatar-based charities can fund

¹²⁷ Crisis Group interviews, Qatari foreign ministry official, Doha, May 2018; Qatari diplomat, May 2018; Qatari aid official, Doha, May 2018.

¹²⁸ Crisis Group interview, Qatari Development Fund official, Doha, May 2018.

¹²⁹ For example, in 2018, exports to Ethiopia from Qatar were less than \$8 million, compared to \$73 million from Saudi Arabia and \$829 million from UAE. The same general pattern holds for exports to other Horn countries such as Djibouti or Somalia in 2018 and in years prior to the 2017 blockade. UN Comtrade data, at <https://comtrade.un.org/data>.

¹³⁰ Crisis Group interview, Qatari member of Silk Road engagement team, Doha, November 2019.

¹³¹ "China, Qatar agree to deepen strategic partnership", Xinhua, 31 January 2019, at www.xinhuanet.com/english/2019-01/31/c_137790332.htm.

¹³² A Qatari-based media analyst close to government said: "The blockade has caused a transformation in Qatar's image in the Horn of Africa, with more sympathy for us as a small nation that is showing resistance against an expansionist UAE. The UAE and Saudi Arabia are seen as being intruders who think they can buy anything. The Qatari image is that of a softer, nicer power". Crisis Group interview, Doha, November 2019.

¹³³ "UAE shuts Mogadishu hospital amid tension with Somali government", Al-Jazeera English (video), 18 April 2018. By some accounts, Qatar tried to take over the project after it was abandoned. Crisis Group interview, Gulf official, April 2018.

¹³⁴ On 31 May 2019, Sudanese transitional authorities shuttered Al-Jazeera English's office in Khartoum and took its broadcasts off the air. "Sudan army says protest site a threat, closes Al Jazeera office", Al-Jazeera English, 31 May 2019.

projects for friendly local or community leaders, and improve these groups' international networks.¹³⁵

That said, Qatari financial and rhetorical support to Islamist groups carries risks. These groups have in the past alienated public opinion when they impose their agendas too broadly or fail to govern beyond a narrow constituency. Many of Sudan's protesters today, for example, oppose Islamist groups because of their strong association with the former regime. Doha's transparent ideological preferences are also increasingly clear in the Horn, tarnishing Qatar's preferred image as a neutral party. This could challenge Doha's attempts to ground its alliances with popular support, rather than relying on high-level personal relationships as they do now.¹³⁶

D. *Sparring with Gulf Rivals in Africa*

Even if they claim that competition is not their intention, Qatar and the UAE consistently have found themselves on opposing sides the last two years. The clearest example is in Somalia, where Doha helped finance the 2017 election of President Mohamed Abdullahi Mohamed (Farmajo) and backed his government. Farmajo declined to take sides openly in the Gulf dispute, but his government opposed port deals Somaliland and Puntland had signed with DP World. Tensions erupted in April 2018, when Somali authorities seized \$10 million in cash from an arriving Emirati airplane, reportedly destined to support a UAE-run military training mission. Abu Dhabi subsequently withdrew its presence from Mogadishu, including a military training camp and a hospital, and boosted its support for Somalia's semi-autonomous federal states.

The resulting split between the Doha-aligned centre and Abu Dhabi-aligned periphery exacerbated existing regionalist tensions, while entrenching Mogadishu's dependence on Qatari aid and the regions' on Emirati backing.¹³⁷ The UAE saw a direct loss to Qatar in the events of 2018.¹³⁸ Doha also describes a zero-sum game:

In order for Somalia to be stable, the [federal] states needs to have good relations [with Mogadishu], but it won't happen as long as the UAE is inciting them. ... The UAE should leave Somalia. They won't encourage their allies to reconcile with the federal government.¹³⁹

Sudan may prove the next fertile ground for intra-Gulf competition. Qatar's minister of state for foreign affairs joined other Gulf dignitaries in attending the signing of a transitional agreement in Khartoum in August 2019.¹⁴⁰ Yet Qatar retains strong links

¹³⁵ Qatari charities have extensive networks across the Gulf, the Middle East and the Horn of Africa. In addition to funding, Qatari charities often host guest lectures from international Islamic scholars and foreign officials. See also Roberts "Reflecting on Qatar's 'Islamist' Soft Power", op. cit.

¹³⁶ Crisis Group interview, Qatar-based Somali academic, Doha, November 2018.

¹³⁷ Crisis Group Africa Briefing N°260, *Somalia and the Gulf Crisis*, 5 June 2018.

¹³⁸ Emirati officials describe Doha as winning this round of competition in Mogadishu, accepting their loss. Crisis Group interview, UAE foreign ministry official, Abu Dhabi, July 2018.

¹³⁹ Crisis Group interview, Qatari foreign ministry official, Doha, November 2018.

¹⁴⁰ Qatar News Agency Tweet, 17 August 2019, at twitter.com/QNAEnglish/status/1162833309044527106.

to Islamist groups in the country as well as parts of the security apparatus, and may support them in upcoming elections.¹⁴¹

Qatar may have a particular incentive to guard its economic interests in Sudan, most notably a 2017 agreement to develop the commercial port of Suakin.¹⁴² If the project moves forward, it would see Qatar in direct competition with the UAE to secure port access along the Red Sea. Losing the contract would be equally significant, marking a clear “loss” to Emirati influence. A senior Qatari official said “we don’t want to be pushed out. Especially because we know that if the UAE succeeds in pushing us out of Sudan, Somalia will be next”.¹⁴³

¹⁴¹ Two diplomats reported separately that Qatar was seeking to strengthen its connections with parts of the military as well as among traditional Islamist allies, and to send a message that Doha would continue to support them, including in eventual elections. Crisis Group interview, senior Western diplomat, July 2019. An AU official said: “Qatar is trying to make inroads [in Sudan], especially to split the security forces”. Crisis Group interview, Addis Ababa, June 2019.

¹⁴² Crisis Group interview, Qatari foreign ministry official, Doha, November 2018.

¹⁴³ Crisis Group interview, senior Qatari official, July 2019.

V. Turkey: Trying to Stay Out of Gulf Disputes

For centuries leading up to World War I, Ottoman influence and control wrapped along both sides of the Red Sea corridor, stretching down across the Horn toward Somalia. To continue building its presence in the Horn of Africa, Turkey draws on the historical legacy of empire and soft power projection: humanitarian aid, business ties and the attraction of Turkey's governing system. The ruling AKP is a movement that fuses Islamic principles with electoral politics and market economics, which it presents as a model in the broader region. Allies such as Somalia are critical to Ankara's domestic narrative that Turkey is a custodian of Islamic solidarity in support of oppressed or downtrodden Muslims worldwide.¹⁴⁴ The country has significant cultural appeal in the Horn of Africa – one reason why both the UAE and Saudi Arabia increasingly consider it a more serious threat than Qatar.

A. "Open to Africa"

The most recent Turkish push into the Horn began in 1998 as economic growth at home expanded, and accelerated after the Justice and Development Party (AKP) came to power and drafted an Action Plan to expand ties with the continent. In 2005, Ankara launched an even more ambitious "Open to Africa" policy that sought to boost the number of embassies, lift trade and convene regular Turkey-Africa summits.¹⁴⁵ Ties with the Horn accelerated again after 2011, when Recep Tayyip Erdoğan, then still prime minister, became the first and only non-African government leader to visit Somalia since the state's collapse in 1991. The Turkish president, whose visit came at a time of famine and insecurity, called on Turkish charities and businesses to set up shop in Mogadishu – and they did.¹⁴⁶

Turkey's early presence in Somalia and its extensive investment in trade, education, health care and security training has earned it an enormous store of goodwill among ordinary Somalis in a way that cannot be said of Saudi Arabia, the UAE or Qatar, all of whose engagement is perceived as more tactical than enduring.¹⁴⁷ During the famine in 2011, Turkey was the only donor to have a visible presence on the ground not barricaded behind blast-proof walls. Erdoğan's response won him plaudits at home for his perceived generosity.¹⁴⁸ Many Somalis see the fact that Turkish citizens residing in Mogadishu generally live among ordinary Somalis, and Turkey's

¹⁴⁴ See, for example, President Erdoğan's speech to the Turkey-Africa Economic and Business Forum, 10 October 2018, *op. cit.*

¹⁴⁵ "Turkey-Africa Relations", Turkey Ministry of Foreign Affairs, undated, at www.mfa.gov.tr/turkey-africa-relations.en.mfa.

¹⁴⁶ Crisis Group interview, Turkish academic, Ankara, September 2018. See also Crisis Group Africa Briefing N°94, *Assessing Turkey's Role in Somalia*, 8 October 2012.

¹⁴⁷ A striking example of Turkey's soft power in Somalia is that Istanbul is now a common name given to newborn Somali girls. See "Istanbul' increasingly popular name for Somali girls", Anadolu Agency, 6 July 2018. A Western diplomat who recently met President Farmajo reported him saying that despite pressure from the Gulf, it would be difficult for a Somali leader to entirely cut off ties with Turkey, and to a lesser degree Qatar, because of the two countries' extensive investments in Somalia. He said such a decision would trigger popular protests. Crisis Group interview, Nairobi, July 2019.

¹⁴⁸ Crisis Group phone interview, Turkish analyst focused on Africa, August 2018.

construction of its biggest embassy in the world, as a vote of confidence in their country.¹⁴⁹

As Turkey established its credibility as a humanitarian actor in Somalia, businesses followed. Turkish contractors could offer lower project costs than Western firms, with lower debt financing rates than China.¹⁵⁰ Business analysts compare entering the African market to Turkey's experience in Central Asia after the Cold War.¹⁵¹ In both cases, Turkey was on the ground floor of an economy for which few others had an appetite.¹⁵²

In addition to the AKP, Turkey's Gülenist movement grew a significant presence in the Horn after 2005.¹⁵³ Then allied with Erdoğan's government, Gülenists opened schools in Somalia, Ethiopia, Kenya and elsewhere on the continent. These institutions created significant pro-Turkish constituencies that have persisted even after Ankara demanded the schools' closing, following a 2016 coup attempt against Erdoğan that he blamed on the Gülen movement.¹⁵⁴

B. *A Virtuous Cycle of Interests*

Turkey's Africa policy is driven less by an overarching strategy than by a series of interlocking interests.¹⁵⁵ Greater political and humanitarian engagement has created a favourable environment for businesses, which then demanded a Turkish security footprint. Two initial investments telegraphed Turkey's political commitment to Africa: a 2005 decision by then-Foreign Minister Ahmet Davutoğlu to vastly increase the number of Turkish embassies in Africa, and Turkish Airlines extending its business to include more than 50 routes from Istanbul to the continent. Turkish companies report that embassies actively assist in working through any political difficulties, while the direct flights lower the cost of doing business.¹⁵⁶

¹⁴⁹ "Erdogan opens largest Turkish embassy during visit to Somalia", AFP, 4 June 2016.

¹⁵⁰ Turkish companies are able to draw on the country's Export-Import bank, as well as similar institutions from product suppliers, for example in the EU, to finance projects, leaving a smaller portion of the overall cost on the government's shoulders to secure a commercial loan. Crisis Group interview, Turkish business leader, Istanbul, September 2018.

¹⁵¹ Crisis Group interview, Turkish business leader, Istanbul, September 2018.

¹⁵² In 2009, Turkish exports to sub-Saharan Africa totalled approximately \$2.74 billion. By 2018, that number had reached almost \$5 billion, "Exports by Country Group and Year", Turkish Statistical Institute, Foreign Trade Database.

¹⁵³ The moniker "Gülenists" refers to members/followers of Fethullah Gülen, a Turkish Islamic preacher heading a transnational movement that the Turkish government accuses of illicitly infiltrating state institutions and holds responsible for the 15 July 2016 coup attempt. Turkey designates the movement a terrorist organisation, calling it the Fethullahçı Terör Örgütü (Fethullahist Terrorist Organisation), or FETÖ.

¹⁵⁴ A political analyst close to the Ethiopian government said: "[The Gülenist school] was one of the finest schools in Addis and even more important because all of the other elite schools were Catholic. There was resistance from people when Turkey decided to close the schools, but they went ahead. And this didn't affect views of Turkey". He said it became clear that Turkey's credibility was strong enough to withstand its punitive move. Crisis Group interview, Addis Ababa, June 2019.

¹⁵⁵ Several Turkish analysts close to the government agreed there is not necessarily a specific design or strategy governing Africa policy. Crisis Group interview, Turkish economic analyst, Ankara, September 2018; phone interview, Turkish academic focusing on Africa, August 2018.

¹⁵⁶ See Appendix B: Diplomatic Presence in Africa by Region. Crisis Group interview, Turkish business executive, Istanbul, September 2018.

Africa policy plays a role in domestic Turkish politics. Since Erdoğan's 2011 visit to Somalia, his government has pitched its humanitarian aid there as a model of Islamic leadership, which offers support without interfering in internal Somali governance.¹⁵⁷ A Turkish academic explained:

Erdoğan is telling a story. His base likes the story he is telling: that he is uniting all the Muslims of the world and he is a leader. ... It has power in domestic politics and this is the main driver behind Turkey's Africa policy.¹⁵⁸

Roughly 80 per cent of Turkey's official development assistance to sub-Saharan Africa in 2017 went to Somalia, and its aid has been all-encompassing.¹⁵⁹ Ankara has given the Mogadishu government budgetary support, helped businesses take on risky contracts, increased trade in both directions and offered humanitarian aid. In exchange, Ankara has sought commercial access for Turkish business and support for its military base in Mogadishu.¹⁶⁰ Turkey is the only Middle Eastern actor to maintain good ties with nearly all of Somalia's regions and multiple clans.¹⁶¹

Businesses say Turkey's strong political ties in the Horn give their bids some advantage.¹⁶² When Erdoğan visits the region, he brings along business executives and makes introductions.¹⁶³ In Somalia, Turkish firms are visible building roads and hospitals. Two Turkish firms have managed Mogadishu port and airport since 2014, which reportedly generate four-fifths of the federal government's revenue.¹⁶⁴ Amid an economic downturn in Turkey, some analysts expect more small- and medium-sized Turkish commercial firms to enter the market in search of foreign-exchange earnings.¹⁶⁵

Turkish firms have several additional advantages. The most successful are adept at organising funding before placing a bid – something that few Western firms have the ability or the risk appetite to do.¹⁶⁶ Many Turkish firms are family businesses, where local governments can easily reach the decision-makers with any concerns.¹⁶⁷

¹⁵⁷ A Turkish political analyst close to the government said: "Turkey's presence [in Somalia] is not new; it reactivates a memory chip from the time of the Ottoman Empire". Crisis Group interview, Istanbul, September 2018.

¹⁵⁸ Crisis Group phone interview, Turkish academic focused on Africa, August 2018.

¹⁵⁹ Calculations based on "Turkey's Official Development Assistance", OECD Development Assistance Committee database, accessed July 2019.

¹⁶⁰ Crisis Group interview, Turkish academic researching development aid, Ankara, September 2018.

¹⁶¹ Crisis Group Africa Report N°280, *Somalia-Somaliland: The Perils of Delaying New Talks*, 12 July 2019.

¹⁶² Crisis Group interview, Turkish business executive, Istanbul, September 2018.

¹⁶³ One executive said: "The Turkish government – the economy minister and particularly Erdoğan – always supports all kinds of Turkish activities. We tell them if we have a problem, and they will usually try to support us". Crisis Group interview, Turkish business executive, Istanbul, September 2018.

¹⁶⁴ Mahad Wasuge, "Turkey's Assistance Model in Somalia", The Heritage Institute for Policy Studies, Mogadishu, 2016.

¹⁶⁵ Crisis Group interview, Turkish business leader, Istanbul, September 2018.

¹⁶⁶ A Turkish business executive said: "In Africa, if you don't have financing, forget it. We have to be very flexible. That's one thing that gives us an advantage compared to contractors from other countries". Crisis Group interview, Istanbul, September 2018.

¹⁶⁷ Crisis Group interview, Turkish business executive, Istanbul, September 2018.

Finally, Turkish firms tend to hire more local workers than their Chinese counterparts, which can be politically attractive to host governments.

Turkey's security objectives emerged as a result of its growing presence and influence: Ankara acquired interests in the Horn that required defending.¹⁶⁸ Turkey has taken two concrete steps in this direction. In September 2017, it opened its largest overseas military facility, a \$50 million base in Mogadishu to train members of the Somali National Army.¹⁶⁹ Several months later, Ankara signed an agreement with Khartoum to redevelop the Sudanese island and seaport of Suakin.¹⁷⁰ These agreements bring Turkey more directly into regional competition in the Horn.

C. *Trying to Steer a Neutral Course*

When the Gulf crisis broke out in 2017, Turkey was the first and most important country to come to Qatar's aid. It sent food items to blockaded Doha and later opened a military base there. But in the Horn, Ankara is adamant that it is neither party to the Gulf rift nor interested in regional competition. Turkish policymakers are conscious that the Gulf crisis's fallout could damage their economic and political interests and undermine Turkey's narrative of inclusive Islamic leadership.¹⁷¹

Turkey has successfully protected most of its economic investments from the crisis. Turkish businesses say that they have not felt nearly the impact that they had anticipated, and that African governments appreciate their tangible record of completing infrastructure projects.¹⁷² Some executives argue that the notion of an ideologically-driven Turkish economic engagement in Africa existed mostly on paper, catering to the AKP base and allowing African leaders to win plaudits for nominally endorsing Erdoğan's Islamist outlook.¹⁷³

Yet in practice, Turkey cannot claim it is on the sidelines of Gulf infighting. Ankara supported and hosted a number of Muslim Brotherhood-linked figures and groups that sought to build political influence after the Arab uprisings. Although its material support likely peaked in 2013, Turkey has continued to back Islamists in state media and official rhetoric.¹⁷⁴ In Libya, Turkey has supported the Government of National Accord, set up by the UN in 2015, including reportedly sending arms to its local allies in 2019 to fend off an offensive on Tripoli by the UAE- and Saudi-backed Libyan National Army.¹⁷⁵ There and elsewhere, such as in Sudan, Turkey has joined Qatar in supporting populist forces that take inspiration from the AKP's brand of politics.¹⁷⁶

¹⁶⁸ A Turkish political analyst close to the government said that Turkey's defence interests follow its commercial interests: "Now defensive barriers are being drawn. We have a military base in Somalia and one in Qatar. Defence lines follow a similar trajectory to economic lines". Crisis Group interview, Istanbul, September 2018.

¹⁶⁹ Abdirahman Hussein and Orhan Coskun, "Turkey opens military base in Mogadishu to train Somali soldiers", Reuters, 30 September 2017.

¹⁷⁰ Ali Kucukgocmen and Khalid Abdelaziz, "Turkey to restore Sudanese Red Sea port and build naval dock", Reuters, 26 December 2017.

¹⁷¹ Crisis Group interview, Turkish economic analyst close to government, Ankara, September 2018.

¹⁷² A Turkish business leader said: "As Turkish companies, we are immune to political changes". Crisis Group interview, Istanbul, September 2018.

¹⁷³ Crisis Group phone interview, Turkish academic focused on Africa, August 2018.

¹⁷⁴ For further background on Turkey's approach, see Joost Hiltermann and Dimitar Bechev, "Turkey's Forays into the Middle East", *Turkish Policy Quarterly*, 14 December 2017.

¹⁷⁵ Crisis Group Middle East Briefing N°69, *Stopping the War for Tripoli*, 23 May 2019.

The Turkish government's entanglement in the ideological battles of the Gulf crisis are most apparent in Somalia. Turkey has worked in the country longer and has deeper ties with parties than either Qatar or the UAE. Yet a former Turkish diplomat said the rivalry between the two Gulf states had "harmed our relationship with the [Somali] opposition", since the current government is aligned with Qatar. He and other Turkish officials maintain that Ankara operates separately and often not in coordination with Doha in Somalia.¹⁷⁷

Against the backdrop of the Gulf crisis, Riyadh and Abu Dhabi view Turkey's security presence in the Horn as highly provocative.¹⁷⁸ The example of the Sudanese island port of Suakin is illustrative. In December 2017, Erdoğan visited the island, a former hub for Ottoman pilgrims en route to Mecca. The two countries signed an agreement for Turkey to restore the territory, including building a port capable of receiving naval vessels.¹⁷⁹ The agreement chilled an already cooling relationship between Turkey and Saudi Arabia, whose Jeddah port sits just across the Red Sea from Suakin.¹⁸⁰ Controversy over the project has not subsided, and after Bashir's ouster in April 2019, reports quickly circulated that the Saudi and UAE-backed transitional military council would nullify the deal.¹⁸¹

Turkey's military base in Mogadishu has proven equally contentious for the Gulf, in part because of its vast scale: the facility can accommodate up to 10,000 recruits for the Somali National Army. Turkish officials argue that the project's details should dispel concern: Turkish personnel will train all soldiers, from infantry to officer corps, recruited across clans in order to minimise competing loyalties within the military – a major hurdle thus far to creating a professional national army.¹⁸² Yet Riyadh and Abu Dhabi view the project with scepticism and are disturbed by the presence of Turkish military personnel just downstream from Bab al-Mandab.¹⁸³

¹⁷⁶ Crisis Group interview, Ethiopian analyst close to the government, Addis Ababa, June 2019.

¹⁷⁷ Crisis Group interview, former Turkish diplomat, Istanbul, September 2018. A foreign ministry official explained: "The idea of competition with the UAE in Somalia doesn't exist. [...] We have a privileged relationship with Qatar and we do a lot together, but we don't really have common projects with Qatar in Somalia. They have their own projects". Crisis Group interview, Turkish foreign ministry official, Ankara, September 2018.

¹⁷⁸ Crisis Group interviews, senior UAE official, Abu Dhabi, June 2019; and senior Saudi official, Riyadh, December 2018. The state-sanctioned killing of Saudi journalist Jamal Khashoggi in the country's Istanbul consulate only sharpened animosity between the Turkish and Saudi governments.

¹⁷⁹ Ali Küçükgöçmen and Khalid Abdelaziz, "Turkey to restore Sudanese Red Sea port and build naval dock", Reuters, 26 December 2017.

¹⁸⁰ Crisis Group interview, senior GCC official, Riyadh, January 2018. A UAE diplomat said: "As you know, Turkey is an unfriendly neighbour, in their coming to Sudan, as is Qatar. They are not welcome in this neighbourhood". Crisis Group interview, June 2018.

¹⁸¹ By some accounts, the military diminished Turkey's role on Suakin to include only cultural redevelopment. Sudan's transitional government, inaugurated in September 2019, will likely re-examine these projects, Crisis Group interview, senior Western diplomat, September 2019. See also Mohamed Helba, "Sudan to annul Turkish Base Agreement on Suakin", *Sada Elbalad*, 21 April 2019. Turkish media dispute that the agreement was nullified and say the Turkish development agency, TIKA, continues to restore the historical site. "Turkey denies Suakin pact ends with Sudan", Anadolu Agency, 27 April 2019.

¹⁸² Crisis Group interview, former Turkish diplomat, Istanbul, September 2018.

¹⁸³ Crisis Group interview, UAE foreign ministry official, Abu Dhabi, October 2018.

VI. Hard Landings

The asymmetry of Gulf-Horn relations has skewed benefits in the Gulf's favour and left many of the risks for the continent. The two axes of Middle Eastern competition – the intra-Gulf crisis and Saudi-Iran tensions – have complicated local politics, weakened civilian state structures and fuelled conflict, most clearly in Somalia and Sudan. Without a significant course correction by the Gulf states, these risks will undermine or even reverse any potential benefits for countries in the Horn. New conflicts could also undermine Gulf states' interests, for example in containing extremism and ensuring maritime safe passage, or tarnish their relationships with regional states and publics for years to come.

On paper, the Arabian Peninsula and the Horn are natural geographic partners, and Gulf political and economic investments could catalyse the Horn's development. Unlike Chinese aid, funds from the Gulf and Turkey usually arrive as grants or highly concessionary loans. Gulf money also has fewer strings attached than Western financial support and certainly requires less accounting after the fact, something that carries benefits but also risk, especially related to corruption.

Infrastructure is another major area of potential cooperation. Turkey and the UAE particularly have strong expertise in large-scale projects and logistics chains. Ports, rail systems and roads can invigorate commerce beyond the initial scope of investments; they are public goods from which all businesses and future investors benefit. There is also a basic logic to the cash-rich and land-poor Gulf investing in agriculture, manufacturing and labour-intensive industry in a Horn region eager for jobs and capital.

As they demonstrated with the rapprochement between Ethiopia and Eritrea, Gulf actors can play a constructive role in ending regional conflicts. They are able to fund agreements more quickly and completely than most Western donors, offering the promise of a tangible peace dividend. When Qatar brokered a deal between Eritrea and Djibouti, it was willing to send observers to the disputed border.¹⁸⁴ Saudi Arabia, Qatar, Turkey and the UAE have all expressed interest in helping resolve outstanding conflicts in the Horn, including between Somalia and Somaliland; Eritrea and Djibouti; parties in South Sudan; and within Sudan.

Yet the list of places where external rivalries are getting in the way is growing. Unravelling the longstanding tensions between Somalia's Qatar-backed federal government and its UAE-backed member states will be difficult, if not impossible, unless Doha and Abu Dhabi, as well as Riyadh and Ankara, put differences aside and sign on to any final settlement.¹⁸⁵

Sudan offers another case study. The Sudanese military's insistence on retaining power – a goal shared by Riyadh and Abu Dhabi – made the transition more chaotic and violent, emboldening actors such as the Rapid Support Forces, who otherwise might have been forced to compromise early on. In May 2019, the influx of Gulf aid set

¹⁸⁴ These peacekeepers were withdrawn after the 2017 Gulf crisis, in which Djibouti and Eritrea both sided with Saudi Arabia and the UAE against Qatar. See Rashid Abdi, "A Dangerous Gulf in the Horn: How the Inter-Arab Crisis is Fuelling Regional Tensions", Crisis Group Commentary, 3 August 2017.

¹⁸⁵ Crisis Group Africa Report N°280, *Somalia-Somaliland: The Perils of Delaying New Talks*, 12 July 2019.

new parameters on the transition: Saudi Arabia and the UAE wanted to safeguard security institutions and sideline Islamist parties, as well as the latter's Turkish and Qatari patrons.¹⁸⁶ Their aid gave the transitional military council a cushion to keep the economy afloat and the ability to postpone talks about handing over power. A senior UN official explained: "Just when we were close [to a deal] in talks [between the TMC and the protesters], we woke up to a \$3 billion pledge and the whole game changed".¹⁸⁷ Saudi and Emirati views did not fundamentally shift after the 3 June killing by RSF forces of protesters in Khartoum. Although both countries expressed dismay over the violence following U.S. pressure, neither capital abandoned its push for the RSF to play a key role in a new government.¹⁸⁸

Even if they do not provoke violence, Gulf rivalries risk weakening Horn government and undermining their ability to manage conflict if and when it arises. To Abu Dhabi, Doha or Riyadh, securing a government friendly on regional affairs typically trumps the need to ensure that government's effectiveness at home. Unaccountable aid and cash can artificially prop up systems that could not survive otherwise. Sudan's Bashir had relied heavily on grants from the Gulf to replenish foreign reserves and fund his security apparatus.¹⁸⁹ During this time, services deteriorated and the economy stagnated until grievances boiled over into unrest. In Eritrea, financial aid from Saudi Arabia and payment for the UAE's base in Assab give the regime the means to keep its security apparatus intact and perpetuate its rule. Such support, however, may only increase the chances that Eritrea will face major unrest if and when a transition occurs eventually.¹⁹⁰

Gulf foreign policy tends to amplify state structures similar to their own: personality-driven power centres that sidestep domestic or regional institutions and marginalise citizen participation.¹⁹¹ The Gulf states' power play thus runs counter to many emerging multilateral and democratic trends in the Horn, where publics in Kenya, Sudan and Ethiopia have demanded greater accountability.¹⁹² Similarly, some African policymakers worry the Gulf's preference for dealing with Horn countries bilaterally will limit states' abilities to safeguard their interests in commercial and other transactions. There is strength in numbers; the states in the Horn could im-

¹⁸⁶ UAE State Minister Anwar Gargash, comments to press, 15 May 2019. Also, consistent with Riyadh and Abu Dhabi's views, the council reportedly declined to allow a Qatari delegation to visit Khartoum. Crisis Group interview, senior Qatari official, July 2019.

¹⁸⁷ Crisis Group interview, Addis Ababa, June 2019.

¹⁸⁸ Crisis Group interview, UAE officials, Abu Dhabi, June and July 2019. Both Saudi Arabia and the UAE issued statements condemning violence in June: "KSA follows with great concern the developments in the brotherly Republic of Sudan", Saudi Press Agency, 5 June 2019, and "UAE following developments in Sudan with great concern", Emirates News Agency (WAM), 6 June 2019.

¹⁸⁹ Crisis Group interview, AU official, Addis Ababa, March 2019.

¹⁹⁰ A senior Saudi official said: "Eritrea needs Saudi Arabia to help it achieve a renaissance. [...] They could not say no [to aid], because the situation in Eritrea is very critical". Crisis Group interview, Riyadh, December 2018.

¹⁹¹ A Qatar-based Somali analyst said: "Qatar has relations only with individuals. It's 'politics for sale' [allies bought to the highest bidder]. It's very hard to understand these policies because just a few people in the Diwan [Royal Palace] run them". Crisis Group interview, Doha, November 2018.

¹⁹² A Kenyan academic said: "The politics of Africa have liberalised and leaders have to have a vision, because constituencies will hold them to account. The Gulf countries need to learn to deal with these liberal systems". Crisis Group interview, Doha, November 2018.

prove their negotiating position if they band together.¹⁹³ Yet even constructive Gulf mediation efforts, for example between Ethiopia and Eritrea, or between Eritrea and Djibouti, have circumvented African institutions.¹⁹⁴

Despite the obvious advantage the Gulf powers enjoy due to their deep pockets, it would be a mistake to perceive their Horn partners as unwitting pawns on a chessboard dominated by outsiders. Somali politicians have expertly played external actors against one another for years, and the financial rewards from the Gulf have been immense: many of the country's leaders have houses in Dubai, Doha or Istanbul. Since intra-Gulf rivalry is the fuel they use to secure funding, these politicians often have neither the capability nor the interest to limit conflict. Gulf monarchies' preference for personalised rather than institutional foreign policy initiatives has created a playground for local politicians seeking to advance their personal agendas and wealth. Sudan's al-Bashir is currently standing trial in Khartoum on charges of accepting \$25 million during his tenure as president, funds he said he had received from the Saudi royal family.¹⁹⁵

An array of political leaders in the Horn also exploit the rivalries of the newly active middle powers in the region to advance their own goals. In Asmara, Afwerki, isolated and ostracised for years owing to his alleged support for the Somalia militant group Al-Shabaab, a frozen war with Eritrea's larger neighbour Ethiopia and his regime's brutal behaviour, has exploited his relations with Saudi Arabia and the UAE (both of which resumed financial assistance to Asmara after he cut ties with Iran in 2016) to earn a rehabilitation of sorts. His decision to endorse an agreement ending the Ethiopian-Eritrean war offered his partners in Riyadh and Abu Dhabi the opportunity to successfully lobby for the lifting of UN sanctions, although he has since shut the border with Ethiopia and shown no signs of ending a widely despised regime of compulsory, sometimes lifelong military service, at home.¹⁹⁶

Others have sought to capitalise, too – sometimes constructively, otherwise less so. As outlined, the generals in Sudan have cultivated Riyadh and Abu Dhabi to try and extend their hold on power.¹⁹⁷ In Ethiopia, Prime Minister Abiy Ahmed has tapped Riyadh and Abu Dhabi for much-needed funds while maintaining good ties with Qatar.¹⁹⁸ Kenya, for its part, has reached out to Doha in an attempt to defuse a drawn-

¹⁹³ A South Sudanese official said: "Most agreements [with Gulf countries] are bilateral [rather than regional], but there are no standards. There are many clauses in some of these agreements that are exploitative and could lead to community conflicts later on. This is a direct result of the fact that they are bilateral". Crisis Group interview, Addis Ababa, March 2019.

¹⁹⁴ A senior AU official said: "The Gulf is pursuing peace in a transactional way. ... The current peace agreement [between Ethiopia and Eritrea] was negotiated without the AU and IGAD. It was signed in Jeddah without these institutions present. This has severe strategic implications, and Gulf states need to understand the potential damage [to their relationship with the AU]". Crisis Group interview, Nairobi, October 2018.

¹⁹⁵ Khalid Abdelaziz, "Ex-Sudan president got millions from Saudis, court hears", Reuters, 19 August 2019.

¹⁹⁶ "Eritrea breakthrough as UN sanctions lifted", BBC, 14 November 2018. "Eritrea shuts all borders with Ethiopia – unilaterally", Africa News, 23 July 2019.

¹⁹⁷ Crisis Group Africa Statement, "Nurturing Sudan's Fledgling Power-Sharing Accord", 20 August 2019.

¹⁹⁸ "Ethiopian PM visits Qatar, seeking investment in his country", FANA, 19 March 2019.

out maritime territorial row with Qatar's allies in Mogadishu.¹⁹⁹ Internally in Somalia, politicians and fixers of all stripes adroitly cultivate Gulf allies to earn millions of dollars by claiming they can help them win contracts or by positioning themselves as candidates likely to win an election.²⁰⁰

Horn of Africa governments may be aware of this balance between risk and benefit, but Gulf aid is too irresistible for many cash-strapped and politically hamstrung states to pass up.²⁰¹ At times, it is also the only option. Ethiopia's Prime Minister Abiy, for example, turned to Gulf countries in part because he inherited a debt-driven economy with quickly evaporating currency reserves.²⁰² Abiy initially sought financial aid from the U.S., but quickly realised that Washington was not in a position to provide the swift, nimble and ample funds he needed.²⁰³ Since accepting UAE grants, he has tried to balance Middle Eastern relations across political divides and limit his exposure to intra-Gulf rivalries. He sent a message to that effect by visiting Qatar and the UAE back-to-back in March 2019.²⁰⁴ Some officials later suggested Abiy had hoped his joint visits would dampen tensions between the Gulf rivals.²⁰⁵

¹⁹⁹ Crisis Group interviews, Western diplomat involved in efforts to resolve the dispute, Nairobi, July 2019.

²⁰⁰ "Harbouring ambitions, Gulf states scramble for Somalia", Reuters, 1 May 2018.

²⁰¹ A senior UN official observed: "This region is very weak and the balance of power between the Gulf and the Horn is definitely in the Gulf's favour. We are seeing more and more transactional and bilateral relationships, and this is a concern [for the region's future], because [African] countries could see quick gains as the best [option]". Crisis Group interview, senior UN official, Addis Ababa, June 2019.

²⁰² Crisis Group interview, former official in the Ethiopian prime minister's office, Addis Ababa, June 2019.

²⁰³ Crisis Group interviews, Western diplomat, Addis Ababa, June 2019; and former official in the Ethiopian prime minister's office, Addis Ababa, June 2019.

²⁰⁴ An official in the Ethiopian prime minister's office said: "We have moved a bit closer to the UAE and Saudi Arabia, but we are making sure that we maintain good relations with Qatar and Iran as well to keep this balance". Crisis Group interview, Addis Ababa, March 2019.

²⁰⁵ Crisis Group interview, Ethiopia foreign ministry official, Addis Ababa, March 2019.

VII. A Better Way Forward

There is an active, yet relatively nascent debate about how to mitigate the pitfalls of increased Gulf and Turkish competition in the Horn. The options on the table thus far fall into two categories: improving multilateral organisations' involvement in order to balance Horn-Gulf bargaining; and encouraging Gulf states and Turkey to modify their own behaviour in a way that preserves the stability they claim to seek.

A. *Toward a More Unified Horn Position vis-à-vis the Gulf*

Asymmetric relations between the Gulf and the Horn drive many, although not all, conflict risks. Thus, the ongoing policy debate in the Horn today focuses on how to improve states' abilities to resist taking sides, most pointedly in the toxic Gulf dispute. Better multilateral engagement could strengthen the Horn's collective voice in this regard. States, regional organisations, Western allies and analysts should focus on two questions: how to craft a common Horn bargaining position, and what forum would offer the best venue to voice those interests vis-à-vis the Gulf.

A number of Horn leaders now argue their region needs a unified policy toward external involvement in order to level the playing field.²⁰⁶ The region could, for example, call for greater transparency in aid, commercial contracts and political engagements to obtain better information about the scope of deals agreed. It could insist on multilateral engagement, at least on certain issues, such as conflict mediation. So far, regional actors have widely varying views about how and how much to regulate interaction. Given these differences, most concrete policy discussions focus on the venue through which to advocate for Horn states' interests.

One idea that has gained momentum is formation of a Red Sea Forum, a platform where all interested parties could share information and air concerns.²⁰⁷ The sub-region's Intergovernmental Authority on Development (IGAD) is and should continue taking the lead. In April 2019, the organisation's Committee of Ambassadors authorised a task force on the Red Sea and Gulf of Aden to draft "a common position" on the challenges and opportunities of geopolitics in the Red Sea corridor.²⁰⁸ For now, IGAD's goal is to begin a conversation among its members to prepare itself for more productive engagement with Gulf actors.²⁰⁹

Proponents hope the task force could eventually evolve into an organ within IGAD that would coordinate and set guidelines for economic, political and security ties with the Gulf. IGAD could eventually seek dialogue with its natural counterpart, the Gulf Cooperation Council, followed by broader conversations that include Turkey as well as global powers. In addition to IGAD's effort, the AU's High Implementation

²⁰⁶ Crisis Group interviews, senior UN official, Nairobi, October 2018; former official in Ethiopian prime minister's office, Addis Ababa, June 2019.

²⁰⁷ Crisis Group interviews, IGAD official, Addis Ababa, March 2019; Ethiopian foreign ministry official, Addis Ababa, March 2019; senior Saudi official, Riyadh, December 2018; senior EU official, July 2019; and senior AU official, Nairobi, October 2018.

²⁰⁸ "IGAD establishes Task Force on the Red Sea and the Gulf of Aden", IGAD press release, 4 April 2019.

²⁰⁹ Crisis Group interview, Djiboutian diplomat, March 2019. Djibouti held the rotating Chair of IGAD when the proposal for a task force emerged.

Panel, formerly focused on Sudan and South Sudan, has a mandate to investigate Red Sea competition.²¹⁰ The UN appointed a special envoy to the Horn in March 2019 who is also following this debate closely. (Both the AU and UN agree that IGAD should sit in the driver's seat for now.²¹¹)

Saudi Arabia and Egypt have sought to become first movers on creating the architecture for regional negotiation, through the launch of their Red Sea Forum for Coastal States. Yet this grouping so far doesn't include several key actors, such as Ethiopia, which is not a coastal state but nonetheless has huge influence in the Red Sea basin, as well as the UAE, Qatar and Turkey, which are further removed geographically. With its limited membership and Saudi- and Egyptian-led agenda, Horn countries view this grouping primarily as a venue through which to improve their ties with Riyadh and Cairo.

B. *Limiting the Fallout from Intra-Gulf Rivalries in the Horn*

With no easy or short-term fixes in sight, regional leaders and Western diplomats should seek to influence Gulf and Turkish thinking on the Horn to limit fallout from their unbridled competition. Currently, both sides of the intra-Gulf rift see their rivals as the primary threats to peace in the Red Sea corridor, while it is the rivalry itself that is generating the greatest risk of conflict.

As both Sudan's transition and the Ethiopia-Eritrea peace agreement demonstrate, Gulf countries' can channel their influence and investments constructively to peacefully end conflict. In Sudan, African and Western engagement with Riyadh and Abu Dhabi shifted the momentum from violence toward a more peaceful way forward. AU, U.S. and European officials worked for several months from April 2019 onward to convince Riyadh and Abu Dhabi that the military alone could not bring the crisis to an end. After dozens of private conversations, in June the UK effectively leveraged an existing four-country forum on Yemen to steer discussion toward Sudan.²¹² The four countries, the U.S., UK, Saudi Arabia and the UAE, subsequently corralled Sudan's generals and protesters together to produce a breakthrough.²¹³ Helping nudge along closed-door conversations, Saudi Arabia and the UAE faced significant negative press for their support to the military. As seen, widespread criticism after their close military allies massacred protesters on 3 June prompted both countries to change tactics.

Western countries, particularly the U.S. and UK, should work to ensure that Sudan remains a positive example, because the risks of relapse remain great. Indeed, neither Riyadh nor Abu Dhabi has fundamentally altered its insistence that the military retain ultimate control. Meanwhile, so long as Sudan retains its U.S. designation as a "state sponsor of terrorism", the Gulf states are among the only significant donors able to support the transition economically, giving them leverage for the foreseeable future. Sudan's civilian authorities and their Western allies should remain vigilant that the initial spirit of the transitional agreement – a gradual move toward civilian

²¹⁰ Crisis Group interviews, AU official, Addis Ababa, March 2019; IGAD official, Addis Ababa, March 2019.

²¹¹ Crisis Group interviews, AU and UN officials, Addis Ababa, June-August 2019.

²¹² Crisis Group interview, senior European diplomat, July 2019.

²¹³ Crisis Group interview, senior Saudi official, Jeddah, September 2019. Crisis Group interview, senior Saudi Official, Jeddah September 2019.

rule – endures, and remind Saudi Arabia and the UAE that Sudan can be a success story only if this is the case.

In Somalia, eighteen months of persistent diplomacy have yielded visible, if modest, signs of progress. At the height of tensions between Qatar and the UAE in March and April 2018, Western diplomats had only limited success in walking back the two states from their contrary positions.²¹⁴ Yet over subsequent months, European and U.S. policymakers repeatedly emphasised the polarisation between a Doha-allied centre and an Abu Dhabi-allied periphery was undermining a decades-long investment in strengthening the Somali federal government.²¹⁵ The UAE has somewhat softened its position toward Mogadishu and stated that it wants the central government to succeed.²¹⁶ Qatar, for its part, maintains that the UAE should leave all of Somalia but has encouraged Mogadishu to seek reconciliation with the country's regional leaders.²¹⁷ These examples highlight the value of long-term conversations with Gulf and Turkish leaders about the havoc their rivalries can cause – and how to find ways to produce more peaceful outcomes.

²¹⁴ Crisis Group interview, U.S. defence official, Washington, August 2018.

²¹⁵ Crisis Group Africa Briefing N°260, *Somalia and the Gulf Crisis*, 5 June 2018.

²¹⁶ Crisis Group interviews, UAE officials, Abu Dhabi, May and October 2018.

²¹⁷ Crisis Group interviews, Qatari officials, Doha, November 2018.

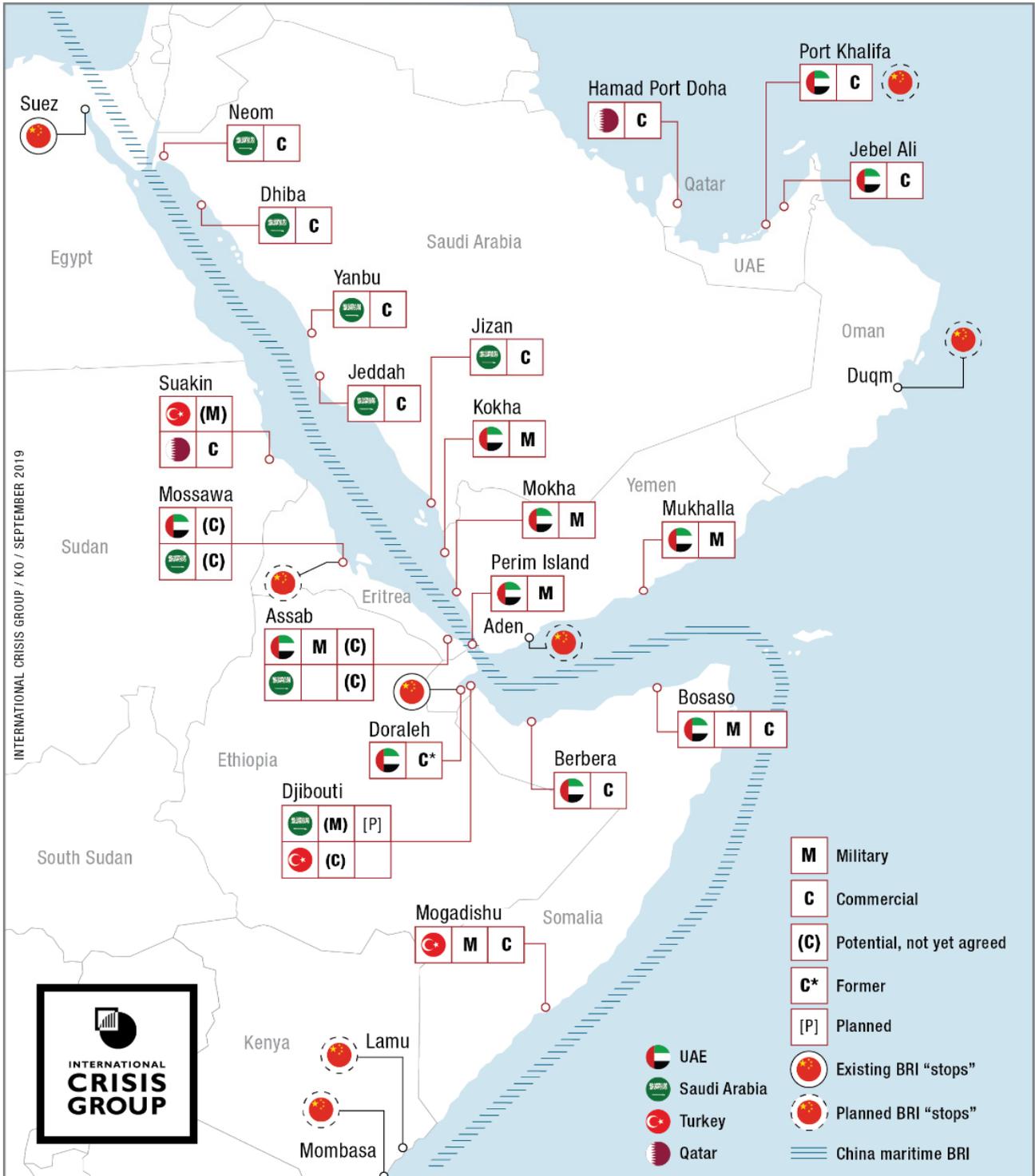
VIII. Conclusion

Relationships between the oil-rich Gulf and the cash-poor Horn of Africa are expanding, offering opportunities and presenting risks that will reverberate for years to come. Gulf policymakers would do well to consider how regional competition and transactional political relationships stand to undermine their long-term stated interests in the Horn, including political stability and, with it, opportunities for investment. Even if intra-Gulf competition serves certain geopolitical interests today, it will almost certainly limit the Horn's ability to develop and strengthen fragile states in the medium and longer term.

Conflict on one side of the Red Sea may well create instability on both coasts – a point that Gulf policymakers often make but fail to reflect in their actions. Today, it is Gulf states that are exporting instability, carrying their own spats to the Horn. If violence erupts, the Gulf could face blowback in the form of piracy, political violence, crime or refugees. Saudi Arabia and the UAE's preference for security states may quell street unrest in the short term (at a high cost of violence) but entrench grievances and exacerbate division in the long term setting the stage for far more destructive unrest down the road. Likewise, Qatar and Turkey's support for Islamist groups may alienate segments of society or set the stage for a backlash against these same forces, particularly if they push to impose broad social change. More broadly, when Gulf states choose sides, it forces others within a society to do so as well, deepening divisions that could otherwise be bridged.

**Riyadh/Abu Dhabi/Doha/Ankara/Nairobi/Addis Ababa/
Brussels, 19 September 2019**

Appendix A: Military and Commercial Investment in the Horn



Appendix B: Diplomatic Presence in Africa by Region

	KSA	Qatar	Turkey	UAE
● = Diplomatic representation is present				
○ = Vacant or closed embassy				
◆ = Planned embassy				
EAST AFRICA				
Comoros	●	○	●	●
Djibouti	●	●	●	●
Eritrea	●	●	●	●
Ethiopia	●	●	●	●
Kenya	●	●	●	●
Madagascar	●	●	●	
Mauritius		●	●	
Rwanda		●	●	●
Seychelles		●	●	
Somalia	●	●	●	●
South Sudan		●	●	
Sudan	●	●	●	●
Tanzania	●	●	●	●
Uganda	●	●	●	●
NORTH AFRICA				
Algeria	●	●	●	●
Egypt	●	○	●	●
Libya	●	●	●	●
Mauritania	●	●	●	●
Morocco	●	●	●	●
Tunisia	●	●	●	●
WEST AFRICA				
Benin	○	●	●	●
Burkina Faso	●	●	●	
Cabo Verde (formerly Cape Verde)		●	●	
Côte d'Ivoire	●	●	●	◆
Gambia		●	●	●
Ghana	●	●	●	●
Guinea	●	●	●	●

	KSA	Qatar	Turkey	UAE
Guinea-Bissau		●	●	
Liberia		●	●	
Mali	●	●	●	●
Niger	●	●	●	
Nigeria	●	●	●	●
Senegal	●	●	●	●
Sierra Leone		●	●	
Togo		●	●	
CENTRAL AFRICA				
Burundi		●	●	
Cameroon	●	●	●	
Central African Republic		●	●	
Chad	●	●	●	●
Democratic Republic of the Congo		●	●	
Equatorial Guinea		●		
Gabon	●	●	●	
Republic of the Congo		●	●	
Sao Tome and Principe		●		
SOUTHERN AFRICA				
Angola		●	●	●
Botswana		●	●	
Eswatini (formerly Swaziland)				●
Lesotho		●	◆	
Malawi		●	●	
Mozambique	●	●	●	●
Namibia		●	●	◆
South Africa	●	●	●	●
Zambia	●	●	●	
Zimbabwe		●	●	◆
Total current & planned embassies	29	51	51	31
● = Diplomatic representation is present ○ = Vacant or closed embassy ◆ = Planned embassy				

Appendix C: Timeline of Key Events

2006

Djibouti grants Emirati company DP World a 30-year concession to manage and develop its Doraleh port.

2008

Eritrea grants Iran access to its Assab port.

April 2008

Ethiopia severs diplomatic relations with Qatar, over its ties with Eritrea.

21 March 2010

Turkey and Egypt co-chair a donor conference to raise pledges for reconstruction and development in Sudan's Darfur region.

21-23 May 2010

Turkey hosts the First Istanbul Conference on Somalia.

June 2010

Following Qatari mediation, Eritrea and Djibouti sign an agreement toward resolving their border conflict. Qatar deploys military observers to the contested area to remain until the parties reach a final settlement.

19 August 2011

Turkish Prime Minister Erdoğan visits Somalia's capital Mogadishu, signalling Turkey's intent to up its engagement.

1 November 2011

Turkey re-opens its embassy in Mogadishu, having closed it when the Somali state collapsed in 1991.

December 2011

Sudan and Qatar sign a range of cooperation agreements paving the way for Qatari investment in Sudan's mining, banking, agriculture, medical technology and public utilities.

6 March 2012

Turkish Airlines starts direct flights between Istanbul and Mogadishu becoming the first major commercial airline to fly to Mogadishu in more than twenty years.

31 May-1 June 2012

Turkey hosts the Second Istanbul Conference on Somalia.

27 June 2012

Ethiopia signs a \$1.7 billion deal with a Turkish construction company to build a railway line between Weldia in the north and Awash in the east.

5 November 2012

Ethiopia and Qatar resume diplomatic relations.

2013

Turkey opens an embassy in Djibouti.

15 September 2013

Turkish company Favori takes over management of Mogadishu international airport.

November 2013

Turkey opens an embassy in Eritrean capital, Asmara.

April 2014

Qatar injects \$1 billion in Sudan's central bank.

21 September 2014

Turkish company Albayrak Group takes over management of Mogadishu port.

2 November 2014

Sudan and Qatar sign a military agreement, including cooperation on training.

6 November 2014

Somalia and the United Arab Emirates (UAE) sign a memorandum of understanding to bolster military and security cooperation.

2015

Saudi Arabia injects \$1 billion into Sudan's central bank. Khartoum cuts ties with Iran and joins the war in Yemen as part of the Saudi-led coalition fighting on the side of the Yemeni government against Huthi rebels.

24 January 2015

Turkey and Djibouti agree to establish a 5 million square meters Special Economic Zone (SEZ) on the Red Sea.

28 April 2015

Djibouti revokes DP World's contract to manage its Doraleh Container Terminal and declines to allow the Saudi-led coalition to use Djibouti-based facilities for its battle in Yemen.

29 April 2015

Eritrea signs a military cooperation agreement with Saudi Arabia.

29 April 2015

The UAE leases Eritrea's Assab port.

October 2015

Ethiopian officials visit Abu Dhabi requesting that the UAE focus on Berbera port in Somaliland rather than Assab in Eritrea.

October 2015

Djibouti restores Saudi Arabia's access to its Camp Lemonnier in return for military equipment.

January 2016

Following the execution in Saudi Arabia of Shia cleric Nimr al-Nimr and subsequent attacks on the Saudi embassy in Tehran and a consulate in Mashhad in Iran, Riyadh cuts diplomatic ties with Tehran. Sudan, Djibouti and Eritrea follow suit.

12 January 2016

Saudi Arabia pledges \$50 million in aid to the Federal Government of Somalia on the same day that Mogadishu announces the severing of diplomatic ties with Iran.

February 2016

Djibouti and Sudan take part in joint military exercises in Saudi Arabia, along with eighteen other countries.

23 February 2016

Turkey hosts the Third High-Level Partnership Forum for Somalia.

3 June 2016

Turkey opens a new embassy in Mogadishu, its largest in the world.

5 September 2016

Somaliland signs a deal with DP World awarding it a 30-year concession to develop and manage Berbera port, to enter into force in March 2017.

18 January 2017

For the first time since the 1990s, a Saudi ambassador presents his credentials to the president of Somalia.

February 2017

Somaliland strikes an agreement with the UAE for the latter to develop a military facility alongside Berbera port.

April 2017

Sudanese and Saudi air forces conduct joint military drill near Sudanese city of Marawe.

6 April 2017

Puntland, a semi-autonomous region in Somalia, signs a deal with UAE-based P&O Ports, a fully-owned subsidiary of DP World, to develop and manage its Bosaso port.

26 April 2017

Saudi Arabia and Djibouti sign a military cooperation agreement, paving the way for the construction of a Saudi military base.

June 2017

Saudi Arabia, the UAE and allied states break off ties with Qatar and impose on it an air and land blockade, accusing it of backing Islamist militants and Iran. Eritrea expresses support for the blockade, while Djibouti downgrades diplomatic relations with Qatar. In response, Qatar withdraws its military observers from the two countries' contested border area.

7 June 2017

Despite pressure from Saudi Arabia, Somalia declines to cut ties with Qatar, calling for a diplomatic resolution to the crisis. The Somali regions of Galmudug, Puntland and Hirshabelle issue statements in support of Saudi Arabia and the UAE, criticising Mogadishu's stance.

26 August 2017

Saudi Arabia pledges \$250 million in aid to Djibouti for the relief of Yemeni refugees.

30 September 2017

In Mogadishu, Turkey opens its biggest overseas military base and its first in Africa.

28 November 2017

Qatar and Somalia sign a \$200 million infrastructure and job creation agreement.

24 December 2017

First visit of a Turkish head of state to Sudan since it gained independence in 1956.

26 December 2017

Sudan awards Turkey a 99-year lease of its port on Suakin island. Besides the port's rehabilitation, the deal includes plans to build a docking facility for civilian and military vessels. The parties also agree that Turkish forces will be stationed at Port Sudan to provide Sudanese forces with counter-terrorism training.

22 February 2018

Djibouti unilaterally terminates DP World's contract to run Doraleh container terminal, seizes assets and forces its employees to leave.

March 2018

Qatar signs agreement with Sudan to jointly develop the commercial port of Suakin.

1 March 2018

Somaliland signs a new agreement with DP World for the development and management of Berbera port, this time including Ethiopia, which is to have a 19 per cent stake.

4 March 2018

Somaliland and DP World finalise a contract for a greenfield economic free zone near the port of Berbera.

8 April 2018

The Somali federal government confiscates \$9.6 million in cash at Mogadishu airport from a UAE plane. The UAE says the funds were intended for a military training program. Shortly after, it halts military cooperation with the federal government, and pulls its troops from Mogadishu.

14 May 2018

Somali President Farmajo visits Doha on an official state visit.

15 June 2018

UAE pledges \$3 billion of investment in Ethiopia, including \$1 billion in currency support.

24 July 2018

After the leaders of Ethiopia and Eritrea finalise their peace agreement, they receive the Order of Zayed award in Abu Dhabi.

2 Aug 2018

Adjudicating the dispute between Djibouti and DP World, the London Court of International Arbitration rules in favour of DP World, deciding that existing contracts are still in force.

September 2018

Saudi and Sudanese militaries conduct joint military exercises in Saudi Arabia.

10 September 2018

Djibouti announces it has nationalised the Doraleh terminal. DP World files for an injunction with the London Court of International Arbitration.

11 September 2018

Turkey and Sudan sign a \$100 million oil exploration deal and an agreement that reserves agricultural land in Sudan for Turkish companies.

16 September 2018

Ethiopian Prime Minister Abiy Ahmed and Eritrean President Isaias Afwerki sign a further peace agreement at a summit hosted by Saudi King Salman.

18 September 2018

Saudi Arabia hosts talks between Djibouti and Eritrea aimed at the settlement of their territorial dispute.

October 2018

Turkish construction company Summa announces it will start building a new airport in Sudanese capital Khartoum in 2019.

December 2018

Qatar announces an agreement with Somalia to begin construction of the Hobyo port and several memoranda of understanding to bolster economic, fiscal and commercial cooperation.

12 December 2018

Saudi Arabia, Djibouti, Somalia, Sudan, Egypt, Yemen and Jordan agree in Riyadh to establish a multilateral entity for economic, political and security cooperation in the Red Sea.

December 2018

Turkey appoints former ambassador to Somalia Dr Olgan Bekar as Special Envoy for Somalia and Somaliland talks.

January 2019

Saudi Arabia, Somalia, Sudan, Djibouti, Yemen, Jordan and Egypt conduct joint naval exercise.

17 January 2019

Qatar donates 68 armoured vehicles to the Somali federal government.

February 2019

Saudi Arabia and Sudan conduct joint maritime exercise at Port Sudan.

April 2019

Following the ouster of Sudanese President Omar al-Bashir, Saudi Arabia and the UAE pledge to put \$500 million into Sudan's central bank and contribute \$2.5 billion in other aid.

4 April 2019

The London Court of Arbitration orders Djibouti to pay Doraleh Container Terminal, partially owned by DP World, \$385 million plus interest for a breach of exclusivity.

Appendix D: About the International Crisis Group

The International Crisis Group (Crisis Group) is an independent, non-profit, non-governmental organisation, with some 120 staff members on five continents, working through field-based analysis and high-level advocacy to prevent and resolve deadly conflict.

Crisis Group's approach is grounded in field research. Teams of political analysts are located within or close by countries or regions at risk of outbreak, escalation or recurrence of violent conflict. Based on information and assessments from the field, it produces analytical reports containing practical recommendations targeted at key international, regional and national decision-takers. Crisis Group also publishes *CrisisWatch*, a monthly early-warning bulletin, providing a succinct regular update on the state of play in up to 70 situations of conflict or potential conflict around the world.

Crisis Group's reports are distributed widely by email and made available simultaneously on its website, www.crisisgroup.org. Crisis Group works closely with governments and those who influence them, including the media, to highlight its crisis analyses and to generate support for its policy prescriptions.

The Crisis Group Board of Trustees – which includes prominent figures from the fields of politics, diplomacy, business and the media – is directly involved in helping to bring the reports and recommendations to the attention of senior policymakers around the world. Crisis Group is chaired by former UN Deputy Secretary-General and Administrator of the United Nations Development Programme (UNDP), Lord (Mark) Malloch-Brown.

Crisis Group's President & CEO, Robert Malley, took up the post on 1 January 2018. Malley was formerly Crisis Group's Middle East and North Africa Program Director and most recently was a Special Assistant to former U.S. President Barack Obama as well as Senior Adviser to the President for the Counter-ISIL Campaign, and White House Coordinator for the Middle East, North Africa and the Gulf region. Previously, he served as President Bill Clinton's Special Assistant for Israeli-Palestinian Affairs.

Crisis Group's international headquarters is in Brussels, and the organisation has offices in seven other locations: Bogotá, Dakar, Istanbul, Nairobi, London, New York, and Washington, DC. It has presences in the following locations: Abuja, Algiers, Bangkok, Beirut, Caracas, Gaza City, Guatemala City, Hong Kong, Jerusalem, Johannesburg, Juba, Mexico City, New Delhi, Rabat, Tbilisi, Toronto, Tripoli, Tunis, and Yangon.

Crisis Group receives financial support from a wide range of governments, foundations, and private sources. Currently Crisis Group holds relationships with the following governmental departments and agencies: Australian Department of Foreign Affairs and Trade, Austrian Development Agency, Danish Ministry of Foreign Affairs, Dutch Ministry of Foreign Affairs, European Union Emergency Trust Fund for Africa, European Union Instrument contributing to Stability and Peace, French Development Agency, French Ministry of Europe and Foreign Affairs, German Federal Foreign Office, Global Affairs Canada, Irish Aid, Iceland Ministry for Foreign Affairs, Japan International Cooperation Agency, Principality of Liechtenstein, Luxembourg Ministry of Foreign and European Affairs, New Zealand Ministry of Foreign Affairs and Trade, Norwegian Ministry of Foreign Affairs, Qatar Ministry of Foreign Affairs, Swedish Ministry of Foreign Affairs, the Swiss Federal Department of Foreign Affairs, the UK Department for International Development, and the United Arab Emirates Ministry of Foreign Affairs and International Cooperation.

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Appendix E: Reports and Briefings on the Middle East and North Africa since 2016

Special Reports and Briefings

Exploiting Disorder: al-Qaeda and the Islamic State, Special Report N°1, 14 March 2016 (also available in Arabic and French).

Seizing the Moment: From Early Warning to Early Action, Special Report N°2, 22 June 2016.

Counter-terrorism Pitfalls: What the U.S. Fight against ISIS and al-Qaeda Should Avoid, Special Report N°3, 22 March 2017.

Council of Despair? The Fragmentation of UN Diplomacy, Special Briefing N°1, 30 April 2019.

Seven Opportunities for the UN in 2019-2020, Special Briefing N°2, 12 September 2019.

Israel/Palestine

How to Preserve the Fragile Calm at Jerusalem's Holy Esplanade, Middle East Briefing N°48, 7 April 2016 (also available in Arabic and Hebrew).

Israel/Palestine: Parameters for a Two-State Settlement, Middle East Report N°172, 28 November 2016 (also available in Arabic).

Israel, Hizbollah and Iran: Preventing Another War in Syria, Middle East Report N°182, 8 February 2018 (also available in Arabic).

Averting War in Gaza, Middle East Briefing N°60, 20 July 2018 (also available in Arabic).

Rebuilding the Gaza Ceasefire, Middle East Report N°191, 16 November 2018 (also available in Arabic).

Defusing the Crisis at Jerusalem's Gate of Mercy, Middle East Briefing N°67, 3 April 2019 (also available in Arabic).

Reversing Israel's Deepening Annexation of Occupied East Jerusalem, Middle East Report N°202, 12 June 2019.

Iraq/Syria/Lebanon

Arsal in the Crosshairs: The Predicament of a Small Lebanese Border Town, Middle East Briefing N°46, 23 February 2016 (also available in Arabic).

Russia's Choice in Syria, Middle East Briefing N°47, 29 March 2016 (also available in Arabic).

Steps Toward Stabilising Syria's Northern Border, Middle East Briefing N°49, 8 April 2016 (also available in Arabic).

Fight or Flight: The Desperate Plight of Iraq's "Generation 2000", Middle East Report N°169, 8 August 2016 (also available in Arabic).

Hizbollah's Syria Conundrum, Middle East Report N°175, 14 March 2017 (also available in Arabic and Farsi).

Fighting ISIS: The Road to and beyond Raqqa, Middle East Briefing N°53, 28 April 2017 (also available in Arabic).

The PKK's Fateful Choice in Northern Syria, Middle East Report N°176, 4 May 2017 (also available in Arabic).

Oil and Borders: How to Fix Iraq's Kurdish Crisis, Middle East Briefing N°55, 17 October 2017 (also available in Arabic).

Averting Disaster in Syria's Idlib Province, Middle East Briefing N°56, 9 February 2018 (also available in Arabic).

Winning the Post-ISIS Battle for Iraq in Sinjar, Middle East Report N°183, 20 February 2018 (also available in Arabic).

Saudi Arabia: Back to Baghdad, Middle East Report N°186, 22 May 2018 (also available in Arabic).

Keeping the Calm in Southern Syria, Middle East Report N°187, 21 June 2018 (also available in Arabic).

Iraq's Paramilitary Groups: The Challenge of Rebuilding a Functioning State, Middle East Report N°188, 30 July 2018 (also available in Arabic).

How to Cope with Iraq's Summer Brushfire, Middle East Briefing N°61, 31 July 2018.

Saving Idlib from Destruction, Middle East Briefing N°63, 3 September 2018 (also available in Arabic).

Prospects for a Deal to Stabilise Syria's North East, Middle East Report N°190, 5 September 2018 (also available in Arabic).

Reviving UN Mediation on Iraq's Disputed Internal Boundaries, Middle East Report N°194, 14 December 2018 (also available in Arabic).

Avoiding a Free-for-all in Syria's North East, Middle East Briefing N°66, 21 December 2018 (also available in Arabic).

Lessons from the Syrian State's Return to the South, Middle East Report N°196, 25 February 2019.

The Best of Bad Options for Syria's Idlib, Middle East Report N°197, 14 March 2019 (also available in Arabic).

After Iraqi Kurdistan's Thwarted Independence Bid, Middle East Report N°199, 27 March 2019 (also available in Arabic and Kurdish).

Squaring the Circles in Syria's North East, Middle East Report N°204, 31 July 2019 (also available in Arabic).

Iraq: Evading the Gathering Storm, Middle East Briefing N°70, 29 August 2019 (also available in Arabic).

North Africa

Tunisia: Transitional Justice and the Fight Against Corruption, Middle East and North Africa Report N°168, 3 May 2016 (also available in Arabic and French).

Jihadist Violence in Tunisia: The Urgent Need for a National Strategy, Middle East and North Africa Briefing N°50, 22 June 2016 (also available in French and Arabic).

The Libyan Political Agreement: Time for a Reset, Middle East and North Africa Report N°170, 4 November 2016 (also available in Arabic).

Algeria's South: Trouble's Bellwether, Middle East and North Africa Report N°171, 21 November 2016 (also available in Arabic and French).

Blocked Transition: Corruption and Regionalism in Tunisia, Middle East and North Africa Report N°177, 10 May 2017 (only available in French and Arabic).

How the Islamic State Rose, Fell and Could Rise Again in the Maghreb, Middle East and North Africa Report N°178, 24 July 2017 (also available in Arabic and French).

How Libya's Fezzan Became Europe's New Border, Middle East and North Africa Report N°179, 31 July 2017 (also available in Arabic).

Stemming Tunisia's Authoritarian Drift, Middle East and North Africa Report N°180, 11 January 2018 (also available in French and Arabic).

Libya's Unhealthy Focus on Personalities, Middle East and North Africa Briefing N°57, 8 May 2018.

Making the Best of France's Libya Summit, Middle East and North Africa Briefing N°58, 28 May 2018 (also available in French).

Restoring Public Confidence in Tunisia's Political System, Middle East and North Africa Briefing N°62, 2 August 2018 (also available in French and Arabic).

After the Showdown in Libya's Oil Crescent, Middle East and North Africa Report N°189, 9 August 2018 (also available in Arabic).

Breaking Algeria's Economic Paralysis, Middle East and North Africa Report N°192, 19 November 2018 (also available in Arabic and French).

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Addressing the Rise of Libya's Madkhali-Salafis, Middle East and North Africa Report N°200, 25 April 2019 (also available in Arabic).

Post-Bouteflika Algeria: Growing Protests, Signs of Repression, Middle East and North Africa Briefing N°68, 26 April 2019 (also available in French and Arabic).

Of Tanks and Banks: Stopping a Dangerous Escalation in Libya, Middle East and North Africa Report N°201, 20 May 2019.

Stopping the War for Tripoli, Middle East and North Africa Briefing N°69, 23 May 2019 (also available in Arabic).

Iran/Yemen/Gulf

Yemen: Is Peace Possible?, Middle East Report N°167, 9 February 2016 (also available in Arabic).

Turkey and Iran: Bitter Friends, Bosom Rivals, Middle East Briefing N°51, 13 December 2016 (also available in Farsi).

Implementing the Iran Nuclear Deal: A Status Report, Middle East Report N°173, 16 January 2017 (also available in Farsi).

Yemen's al-Qaeda: Expanding the Base, Middle East Report N°174, 2 February 2017 (also available in Arabic).

Instruments of Pain (I): Conflict and Famine in Yemen, Middle East Briefing N°52, 13 April 2017 (also available in Arabic).

Discord in Yemen's North Could Be a Chance for Peace, Middle East Briefing N°54, 11 October 2017 (also available in Arabic).

The Iran Nuclear Deal at Two: A Status Report, Middle East Report N°181, 16 January 2018 (also available in Arabic and Farsi).

Iran's Priorities in a Turbulent Middle East, Middle East Report N°184, 13 April 2018 (also available in Arabic).

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How to Halt Yemen's Slide into Famine, Middle East Report N°193, 21 November 2018 (also available in Arabic).

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Saving the Stockholm Agreement and Averting a Regional Conflagration in Yemen, Middle East Report N°203, 18 July 2019 (also available in Arabic).

Averting the Middle East's 1914 Moment, Middle East Report N°205, 1 August 2019 (also available in Farsi and Arabic).

After Aden: Navigating Yemen's New Political Landscape, Middle East Briefing N°71, 30 August 2019 (also available in Arabic).

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