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# Toward a Gulf-Horn Partnership: Opportunities, Institutional Constraints, and Political Risks

Shared maritime and economic interests are creating a basis for selective Gulf-Horn cooperation, even as political fragmentation, sovereignty disputes, and competing regional strategies constrain institutionalization.

**CENTRAL ARGUMENT**

The Gulf and the Horn of Africa increasingly share a common set of regional public goods: secure sea lanes, functioning ports, resilient commercial corridors, capable states, and predictable interstate relations. Political differences remain substantial, yet the Gulf countries, the Horn and Red Sea countries, and external partners Israel and Türkiye have overlapping interests that support selective cooperation in maritime security, infrastructure, trade, food security, and crisis management.

The Gulf and the Horn of Africa increasingly operate within a connected regional system organized around the Red Sea, Gulf of Aden, and adjoining maritime corridors. At its core are the **Gulf countries**: Saudi Arabia, the United Arab Emirates, Qatar, Oman, and Yemen; and the **Horn and Red Sea countries**: Egypt, Sudan, Djibouti, Somalia, Eritrea, Ethiopia, and Jordan. **Israel and Türkiye are important external partners** whose security, diplomatic, commercial, and maritime interests increasingly intersect with this regional system. These fourteen states occupy different geographic and institutional positions, yet their strategic calculations increasingly converge around the stability of the same maritime space.

The Red Sea security crisis that began in late 2023 has made this interdependence unusually visible. The International Maritime Organization (IMO) documented a sustained series of attacks on merchant shipping in the Red Sea and Gulf of Aden and, after a period of relative calm, reported renewed attacks on *Magic Seas* and *Eternity C* in July 2025 (International Maritime Organization, 2025a,b). The disruption has had measurable economic effects. U.S. Energy Information Administration data show that total oil flows through Bab el-Mandeb averaged about 4.2 million barrels per day in the first half of 2025, down from 9.3 million barrels per day in 2023 (U.S. Energy Information Administration, 2025). The consequences extend beyond Yemen: insecurity affects Gulf exporters, Horn ports, Egyptian canal revenues, Jordanian and Israeli Red Sea access, insurance costs, vessel routing, and Europe-Asia supply chains.

## A regional system organized around the sea

Geography supplies the strongest rationale for cooperation. The wider maritime system connects the Arabian Sea with the Gulf of Aden, Bab el-Mandeb, Red Sea, Gulf of Aqaba, Suez Canal, and Mediterranean. Gulf ports connect economically to this system through energy exports, container shipping, food imports, logistics networks, and investment. Ports on both shores therefore operate within interconnected commercial systems rather than as isolated national assets.

The security environment is multidimensional. Houthi attacks are the most visible recent threat to commercial navigation, yet they form one component of a broader maritime-security problem. Somali piracy and armed robbery at sea have also re-emerged as risks. The United Nations Panel of Experts on Somalia included an overview of piracy and armed robbery off Somalia through 2025 in its November report, reflecting continuing concern about the persistence and adaptability of pirate networks (United Nations Security Council, 2025a). The motives and organizational structures differ: Houthi attacks emerge from an armed political movement pursuing strategic objectives within a wider regional conflict, while Somali piracy is primarily a maritime criminal enterprise shaped by ransom incentives, coastal governance weaknesses, and enforcement gaps. Their effects nevertheless converge at sea through risks to crews, higher insurance and security costs, altered shipping decisions, and greater demands on naval and coast-guard capabilities.

Additional threats connect maritime insecurity to conditions ashore. Al-Shabaab remains a major security challenge in Somalia, while illicit movements of weapons, charcoal, people, and other commodities connect maritime routes with insurgency and criminal economies. In March 2025, the United Nations Security Council renewed maritime interdiction authorities concerning charcoal, weapons or military equipment, and improvised-explosive-device components under the Al-Shabaab sanctions regime (United Nations Security Council, 2025b). Maritime security consequently provides the clearest first pillar for a Gulf-Horn partnership: maritime-domain awareness, coast-guard capacity, port security, information exchange, search and rescue, counter-piracy, anti-smuggling operations, fisheries protection, and protection of critical maritime infrastructure.

## Strategic convergence across the regional system

The strongest case for partnership does not require political uniformity. The Gulf countries and the Horn and Red Sea countries differ in political systems, alliances, threat perceptions, and approaches to regional conflicts. Israel and Türkiye add further strategic perspectives. Yet these actors confront a common underlying question: how to maintain a sufficiently secure and predictable regional environment across a strategically important maritime space.

The **Gulf countries** have direct interests in secure maritime commerce, energy exports, functioning ports, food security, investment protection, and stable connections between Gulf economies and African and European markets. The **Horn and Red Sea countries** approach the system from different positions. Egypt depends heavily on Suez and Red Sea navigation. Djibouti, Somalia, Eritrea, and Sudan possess strategically located coastlines and ports. Landlocked Ethiopia depends heavily on maritime corridors through neighboring states; the World Bank reports that more than 95 percent of Ethiopia's import-export trade by volume uses the Addis-Djibouti corridor (World Bank, 2023). Jordan's access through Aqaba connects it directly to Red Sea commerce and security.

**Israel and Türkiye occupy distinct positions as external partners.** Israel's access through Eilat and the Gulf of Aqaba, its peace treaties with Egypt and Jordan, and its formal relationship with the United Arab Emirates following the Abraham Accords connect Israeli strategic calculations to the wider Red Sea system (United Arab Emirates Ministry of Foreign Affairs, 2020). Türkiye has developed extensive diplomatic, commercial, security, and humanitarian relationships in the Horn and has demonstrated a capacity to mediate disputes among regional governments. The Ankara Declaration of December 11, 2024, and the first round of technical negotiations in February 2025 illustrate that mediation role in the Ethiopia-Somalia dispute (Republic of Türkiye Ministry of Foreign Affairs, 2024, 2025).

Despite substantial differences in diplomatic positions, security doctrines, and approaches to regional conflicts, Israel, the Gulf countries, and the Horn and Red Sea countries share several ultimate interests. All depend, to varying degrees, on secure maritime routes through the Red Sea, Gulf of Aden, Bab el-Mandeb, Gulf of Aqaba, and adjoining waters. All have interests in limiting piracy, trafficking, terrorism, and the ability of armed non-state actors to disrupt shipping and infrastructure. They also benefit from protecting ports, energy facilities, communications infrastructure, commercial corridors, and the movement of goods between Europe, Asia, the Middle East, and Africa.

These interests do not create a unified strategic bloc. They create a more limited and potentially more durable phenomenon: **convergence around regional public goods**. Freedom of navigation, functioning ports, secure commercial corridors, capable states, and predictable interstate relations benefit governments that may continue to disagree sharply over particular conflicts. A Gulf-Horn partnership therefore requires mechanisms for cooperation across political differences rather than strategic uniformity.

## Economic corridors rather than isolated ports

Economic complementarity provides a second foundation for partnership. Gulf countries possess substantial investment capital, globally connected logistics firms, energy capabilities, and technological resources. Horn countries possess strategic coastlines, growing markets, agricultural and livestock resources, renewable-energy potential, and access to African hinterlands. Existing investments demonstrate how these capabilities can connect. DP World's Berbera development combines port infrastructure, an economic zone, and a corridor intended to improve access to Ethiopia and regional markets (DP World, 2024). Djibouti performs an even larger gateway function for Ethiopia (World Bank, 2023).

The appropriate unit of analysis is therefore increasingly the **corridor**, not the port alone. Ports derive strategic value from roads, railways, customs systems, energy supplies, digital networks, inland logistics facilities, and political agreements linking maritime gateways with markets. Competition over ports can deepen geopolitical rivalry when infrastructure becomes embedded in recognition disputes or military competition. Coordinated corridor development can instead expand trade and create mutual economic interests across borders.

Food security offers another area of complementarity. Gulf economies depend heavily on external food supplies, while agriculture and livestock remain central to Horn economies. Gulf investment in veterinary systems, cold chains, water infrastructure, processing, storage, certification, agricultural technology, and climate-resilient production could improve supply resilience while increasing local value addition and employment in the Horn. The policy objective should be durable production and logistics systems rather than short-term commodity access.

## The institutional deficit

The principal obstacle is institutional fragmentation. Gulf-Horn relations remain organized largely through bilateral diplomacy, individual investments, development funds, security arrangements, and crisis-specific initiatives. Existing organizations provide components of a regional architecture: the Gulf Cooperation Council (GCC) supplies an established Gulf framework; the Intergovernmental Authority on Development (IGAD) provides an institutional framework across much of the Horn; the African Union supplies a continental political and security framework; and the Council of Arab and African States Bordering the Red Sea and Gulf of Aden offers a partial littoral mechanism.

None fully corresponds to the emerging strategic geography. A strictly littoral arrangement excludes important actors whose interests directly affect Red Sea security. Ethiopia is landlocked yet economically dependent on Red Sea access. The UAE, Qatar, and Oman exercise substantial economic and strategic influence across the wider region. Israel has direct Red Sea access through the Gulf of Aqaba. Türkiye exercises influence through diplomacy, investment, security relationships, and mediation.

A workable partnership should therefore begin with structured **GCC-IGAD cooperation** rather than an ambitious new supranational organization. Regular ministerial dialogue could be supported by technical working groups on maritime security, ports and corridors, food and water security, energy, climate resilience, digital connectivity, investment standards, and humanitarian response. Israel and Türkiye could participate selectively as external partners where their interests and capabilities are relevant. Egypt, Jordan, and other Red Sea actors could participate in issue-specific arrangements where geography and institutional mandates require their involvement. This variable-geometry model would allow different coalitions to address different problems while preserving a recognizable Gulf-Horn institutional center.

## Political risks, conflict, and sovereignty

The same geography that creates opportunities for cooperation also transmits political conflict. Sudan illustrates the first problem. In May 2025, drone attacks targeted Port Sudan International Airport and other civilian infrastructure, including a fuel storage facility and power infrastructure. The United Nations described Port Sudan as Sudan's main humanitarian hub and warned that attacks on this infrastructure threatened humanitarian operations (United Nations in Sudan, 2025). The episode demonstrated how a civil war concentrated largely inland could extend directly into the Red Sea system.

The Ethiopia-Somalia dispute illustrates a different risk. Maritime access, ports, territorial authority, and diplomatic recognition can become intertwined. The Ankara Declaration reaffirmed the sovereignty, unity, independence, and territorial integrity of Ethiopia and Somalia while creating a framework for negotiations concerning Ethiopian access to the sea under Somali sovereign authority (Republic of Türkiye Ministry of Foreign Affairs, 2024). The episode demonstrates that infrastructure and connectivity projects require legal legitimacy and political arrangements capable of protecting sovereignty.

Competition among regional powers creates another constraint. Ports, military facilities, infrastructure finance, recognition disputes, diplomatic relationships, and security partnerships can become instruments of geopolitical competition. A Gulf-Horn framework therefore requires a principle of **regional additionality**: investment and security cooperation should increase regional connectivity, economic capacity, and institutional resilience without deepening political fragmentation or creating incompatible bilateral dependencies. Transparent agreements, respect for sovereignty, and consultation with regional institutions would reduce the likelihood that infrastructure investment becomes another arena for destabilizing competition.

## Toward a practical partnership

The most credible Gulf-Horn partnership would begin with areas where interests already converge. Maritime-domain awareness, port interoperability, counter-piracy, trade facilitation, livestock and food standards, climate adaptation, infrastructure finance, digital connectivity, and coordinated humanitarian logistics offer opportunities for measurable cooperation. Security cooperation should strengthen national and regional institutions. Investment agreements should incorporate transparent procurement, debt sustainability, local employment, environmental safeguards, and credible dispute-resolution mechanisms.

Institutionally, GCC-IGAD dialogue could provide the core architecture, with the African Union and existing Red Sea institutions participating where mandates overlap. The Gulf countries and Horn and Red Sea countries would remain the central participants, while Israel and Türkiye could engage as external partners through issue-specific formats.

The central proposition is **strategic convergence without political uniformity**. Gulf governments, Horn and Red Sea governments, Israel, and Türkiye differ over conflicts, alliances, sovereignty questions, and approaches to regional security. Those differences impose genuine political constraints. Their ultimate interests nevertheless overlap around secure seas, functioning states, protected infrastructure, reliable commercial corridors, economic growth, and predictable interstate relations.

The Houthi attacks, renewed Somali piracy, Al-Shabaab and transnational criminal networks, the war in Sudan, and interstate disputes over ports and maritime access demonstrate that Red Sea insecurity cannot be reduced to a single conflict or threat. These problems differ in origins, actors, and political significance, yet their consequences travel through common maritime and economic networks. Geography has already created interdependence. The policy challenge is to build institutions capable of converting shared interests into practical cooperation while preventing political competition from destabilizing the regional system.

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