

THE CLOCK TOWER SECURITY SERIES



Enhancing Security in the Red Sea Arena *By Simon Rynn and Benjamin P. Nickels*

Introduction

Few sites are more geopolitically important or strategically uncertain than the Red Sea. Each year around 12% of global maritime trade, including 30% of all seaborne traded crude oil, passes through this body of water, which connects the Indian Ocean to the Eastern Mediterranean through two choke points, Bab el Mandeb and the Suez Canal. In the Red Sea, ports as well as oil and gas production and export facilities and pipelines are sited or planned on-shore, while broadband cables pass beneath the seabed. Conflicts in Ethiopia, Sudan, Yemen, Somalia, and Israel/Palestine trouble security in the region. In October 2023, fighters of Ansar Allah (sometimes called the Houthi movement or the Houthis) in Yemen apparently launched missile and drone strikes against Israel, and Hamas rockets have landed in Eilat, the Gulf of Aqaba port of Israel, which is reportedly deploying naval assets to the Red Sea. Great powers and middle powers have shown increased interest in the region, and competition is growing over military and energy infrastructure projects. The entire Red Sea Arena (hereafter RSA) has also suffered from droughts and water/food shortages, which some attribute to climate change. Meanwhile, diplomatic engagements and Red Sea multilateral bodies are proliferating, posing challenges for the coherence of security architectures in the region. Given the area's complexity and wider strategic importance, enhancing security should be seen as a critical task for international security.

To address the task, the Royal United Services Institute (RUSI) and George C. Marshall Center (GCMC) assembled 47 participants from the region and from Europe, the United States, and the United Kingdom for a face-to-face, non-attribution conference in London on November 15 and 16, 2023. The conference aimed to map and analyze the evolving strategic and security environment of the RSA; to develop new approaches for promoting peace and stability in the RSA, in ways that maintain vital interests and avoid unnecessary friction; to identify opportunities and entry-points for enhanced engagement in the RSA by the United Kingdom, United States, Europe, and NATO; and to reinforce practitioner and expert networks from countries and organizations working on the security of the RSA.

Since the conference, events have moved quickly in the RSA. This report considers some of the subsequent developments in its concluding paragraph. The body of this paper, however, presents key takeaways based on the November meeting. From conference discussions, a framework emerged through which the rapidly evolving current events in the region can be viewed.

RED SEA DYNAMICS

Long an element of stability, the Red Sea's maritime domain may be emerging as a vector of instability. Ironically, the maritime element of the Red Sea can be overlooked, because the waters have traditionally been, compared to the shores, remarkably peaceful and secure. The Red Sea itself has been a place of international comity. Major powers may have different on-land objectives, but they share many interests at sea. Global and regional powers share a general interest in free trade passage through the waterways, and all countries are subject to the obvious vulnerabilities presented by the choke points at Bab el Mandab and the Suez Canal. There are a number of collaborative efforts to combat piracy and illicit maritime activities in the Red Sea, and many global powers have built sites in Djibouti. The French have a long history there, and they have been joined by other European powers to fight piracy. China has invested in the Djibouti-Ethiopia corridor and the port. After the 2000 terrorist attack on the USS Cole in the Gulf of Aden, the United States found in Djibouti a hub for counterterrorism actions in Yemen and Somalia (as well as a stepping stone to Diego Garcia). While the United States has reportedly been considering a move to Berbera to relocate away from China, for the most part the global actors have been co-located in Djibouti without friction. The Red Sea also enjoys shared legal frameworks and structures, such as the Djibouti Code of Conduct/Jeddah Agreement (DCoC), and there are efforts at greater cooperation in law enforcement, civil-military actions, and information sharing. There have been successes, including the containment of Somali piracy in the past decade, as well as common future goals, such as the aim that all nations on the Red Sea set up maritime security centers and adopt a regional strategy. RSA challenges at sea include the enduring need to sharpen the common operating picture, to increase cooperation, to improve whole-of-government coordination, and to encourage political buy-in and capacity building at the national level so that countries can collaborate effectively. However, there are rising signs of possible instability at and from the sea. Maritime infrastructure projects will inevitably link the sea to the land and its problems. Adversarial forces have near parity in capability in the Red Sea, a unique feature of the area. Relations between the United States and Iran offer one example. The US is stretched very thinly in the Red Sea, without enough vessels to control the area alone, making it in need of regional assets and partners. Iran, meanwhile, has essentially a 'floating armory' patrolling the Red Sea, at the disposal of a regime that knows how to leverage harm to the international system and its Western backers. The Abqaiq-Khurasan attack was a way for Iran to demonstrate that, if the international system and especially the West can sanction Iran, Iran can also 'sanction' the global economy in return. The 2021 six-day obstruction of the Suez Canal by the accident of the *Ever Given* stopped hundreds of ships from passing through and cost nearly \$10BN to world trade, prompting Egypt to promise a major overhaul with the widening of the canal. This event harkened back in some ways to the effective closure of the canal to international navigation in the wake of Egypt's nationalization in 1956 and the eight years of disruption that followed the 1967 War. Similar events involving either the canal or the wider Red Sea are possible in future. That a decrepit tanker decaying just off the coast of Yemen, *FSO Safer*, could threaten to spill more than one million barrels of oil along the coastline and create potentially one of the world's worst environmental catastrophes in the Red Sea, is a symbol of how maritime concerns can become land concerns in the RSA.

The expression Red Sea Arena offers a necessary new mental map of security dynamics in the region. To understand actual on-the-ground security developments, there should be updates to the narratives, lenses, and framings used to address the Red Sea. Different approaches require different levels of analysis. For example, the region can be studied through the interests of global powers, middle powers, regional powers, nation-states, and sub-national actors. The region can also be understood through sectoral descriptions – the defense and security build-up; trade routes and energy infrastructures; governance and diplomacy efforts; human security concerns; and so on. It can also be viewed through the lens of middle and regional power maneuvers, where Red Sea countries interact with one another, sometimes in clusters and sometimes as nation-states pursuing their own interests. The RSA may be addressed in smaller sections: the lower Red Sea (from the Egypt-Sudan border to the south) is in some ways different from the upper Red Sea. Alternatively, the area may be seen as an attachment or appendage to larger geographic entities. The region may be seen as part of a general ‘Arc of Instability’ stretching across Africa through the Sahel or as a section of the Broader Middle East; from the maritime perspective, the Red Sea region extends into the Indian Ocean. The new term *arena* helps, through its novelty, to recall the evolving, fluid nature of the countries and relationships of the region and the contestation between a complex, concentric set of actors. To a greater or lesser extent, the region’s states are striving to achieve sustainable economic growth, prosperity, social cohesion, state capacity, and legitimacy. This makes them ‘works in progress.’ The term *arena* also helps to capture the intense security interplay of the roughly dozen and a half adjacent and nearby nations. About half of the arena’s countries are the main littoral states of Djibouti, Egypt, Eritrea, Kingdom of Saudi Arabia (KSA), Sudan, and Yemen, as well as two states with Red Sea access via the Straits of Tiran, Israel and Jordan, and one country that lost its Red Sea access thirty years ago: Ethiopia. Red Sea dynamics extend into the Gulf of Aden and its littoral states of Somalia and Oman; and into the Mediterranean, to include countries like Libya, Syria, and Türkiye. The RSA is also a place of strategic interest for Persian Gulf powers like Iran, the United Arab Emirates (UAE), and Qatar. Thus Red Sea dynamics can help explain jockeying between states like KSA and UAE in other international fora, such as the G7 and the BRICS+. The RSA is also a place of active communications investments: Gulf countries are searching for new narratives that explain and justify their own role in the arena, whereas African efforts endeavor, for example, to describe the Red Sea as a natural extension of the Horn of Africa. From a long-term historical perspective, there is undoubtedly a certain cultural interplay and unity to the region.

The RSA is a coherent area of rising strategic investment and geopolitical importance. The RSA has certain characteristics. It is shaped by the importance of Islam, as well as the instrumentalization of religion for political purposes. The region knows a trade in khat, charcoal, and certain drugs. Piracy is a regional challenge, though the major concern in the Red Sea proper might actually be unregulated migration. (Illegal, unreported, and unregulated [IUU] fishing exists but is more an issue off Somalia’s coast and in the Western Indian Ocean). The RSA as a security complex also garners significant geopolitical investments. The RSA sits at a strategic crossroads between Europe, Asia, Africa, and the Middle East. There are global North-South connections of Europe to Asia. It is the ‘belt buckle’ in China’s Belt and Road Initiative (BRI), and several RSA states – Egypt, Ethiopia, Iran, and UAE – recently acceded to the BRICS+ formation (and KSA may soon follow). There are also regional West-East connections of Africa to the Middle East. The arena is home to hundreds of millions of people, around four-fifths the

number of the entire European Union (EU). The Red Sea's coastline is a source for critical raw materials, many of which cross borders. There are subsea resources like the Arabian-Nubian Shield, significant oil reserves (which RSA states have the energy to extract and process), and important raw materials for green energy and food production, such as aluminum, copper, phosphate, and ammonia.

Significant divisions remain within the RSA. Ever since the era of decolonization, what happens on water has become rather distinct from what happens on land in the RSA. The maritime domain of security has been relatively separate and unrelated to events on shore. The ground wars around the Red Sea are shaped by land-based concerns like food and fuel supplies, and fighting in conflicts, such as the wars in Sudan or Yemen, remains mainly within a country, countries, or neighborhood on one side of the Red Sea. The significant population displacement from conflicts has tended to remain on one shore of the Red Sea as well – not only in terms of Internally Displaced Persons (IDPs), but also of refugees. The water has not served as a main supply route for weaponry employed in the wars in the Horn of Africa. The wars have not focused on maritime assets or port access, and they remain distinct conflicts that bleed one into another, to the extent they are connected at all. Human movement across the water for work is most pronounced during peacetime, and while informal trade continues among locals with strong maritime backgrounds in communities dominated by sea-linked labor and situated along the Red Sea's coastlines, these communities are marginalized from their nations' city-dwellers and dominant elites – whether in Yemen, Sudan, Djibouti, or Somalia. Moreover, the African and Arab sides of the Red Sea experience significant differences in development, wealth, and so on. The Gulf states are strategic in their approach to the RSA's African states, and their investments in the Horn are for material and pragmatic purposes. Gulf states are looking to ensure food security by finding land lease and entry-points to access food on the African side. This follows historical patterns – ancient principalities like Suakin (in present-day Sudan), Massawa (Eritrea), and Tadjourah (Djibouti) relied on African food production and trade. Today's Gulf states also understand that Africa is key for their economic diversification, even though they have tended recently not to follow up after announced investments. They have a narrative about the RSA and the money to back it up, but there are hard power limits that the Gulf states must address to undergird their view. They are particularly worried about regime security, especially after the Arab Spring, so they are looking for safe investments abroad. But Gulf militaries seem to have reduced their involvement in the Horn, in part due to local opposition. Hence the proposed Saudi base in Djibouti has not been built, for example, and some of the UAE's actions have stalled.

Infrastructure could be a game changer and source of new disputes in the RSA. New infrastructure projects are changing the shape of security in the region, although the specifics remain unclear because reporting has not always been based on facts and empirical details. Railroads and ports are not so significant in and of themselves; they are important for how they connect growing manufacturing centers and trade routes. Oil and gas infrastructure must be analyzed through ties to emerging energy technologies. Ports now blur the meaning of the terms *port* and *base* (just as the current security environment blurs notions of peace and war), and while these port/base complexes mainly affect maritime security, there is an increasing sense that these assets could have on-shore implications. There are also several disputes over water infrastructure. It is not just the Grand Ethiopian Renaissance Dam (GERD), where Egypt and Ethiopia are at loggerheads, but many other dams in the Horn region that could create conflict,

such as the series of Gibe dams on the Omo river that are decreasing flows of water from Ethiopia into Lake Turkana, which Ethiopia shares with Kenya and where there have been land grabs and bouts of food insecurity. Sensitive sites, like treatment plants, are vulnerable to attack. Investments in infrastructure reveal the strategies of different actors and could become hot spots for conflict.

Governance by violent non-state actors (VNSAs) carries negative consequences for the region.

State fragility and fragmentation means that many people in the RSA are effectively governed by VNSAs. Ordinary citizens might appreciate aspects of rule by Al-Shabaab or Yemeni militias at first, because they promise to govern well, to provide alternative forms of justice, and even in some cases to ensure environmental cleanups (e.g., banning plastic bags). However, VNSAs eventually, often quite quickly, show their true colors. They tax at high rates without providing sustained services; they can be cruel and violent toward civilians (crushing communities and launching offensives during droughts and famines); they can weaponize natural resources (e.g., Al-Shabaab diverted the Jubba river in order to ambush US, Kenyan, and Somali forces); and so on. The ability and will of VNSAs to supplant states and actually govern is often exaggerated. VNSA messaging about state shortcomings does not mean that such actors will do better when they ‘replace’ the government. Often the VNSAs that claim legitimacy through religion are actually linked to high-tech and state-connected criminal organizations, a feature that deserves more attention and analysis.

BRICS+ is expanding mainly within the RSA. Egypt, Ethiopia, Iran, KSA, and UAE – that is, all but one of the six countries invited to join the BRICS in 2024 – are in the RSA. (Argentina was invited to join but opted out). China is in good standing within the RSA, because its presence remains focused on maritime security and commercial interests. For example, China is positioning itself for a monopoly on metals processing (a sector that it leads, followed by Russia and the UAE). A materially constrained Russia, meanwhile, has struggled to find common points with China in the RSA, and Russia is concerned about China’s base in Djibouti and its growing role and standing in the region. Russia still harbors aspirations of influence in the RSA, something it has at times realized through the use of proxies. But Russian hopes that either side in the Sudan war will grant Moscow a Red Sea base – to complement its Eastern Mediterranean base – have essentially stalled. For certain RSA countries, the BRICS+ serves as a hedge within the international system, something that they desire even more since the Ukraine War has generated food insecurity and inflation. Neutrality and non-alignment has been a quick, sustained, and perhaps expanding response to the war from middle powers like Indonesia as well as RSA countries.

The eclipse of the rules-based international order is accelerating the RSA shake-up. The RSA has been a showcase of shortcomings for the regional and international security order. It is true that there have been steady investments in institutions of the international order, especially along the African side of the RSA. The African Peace and Security Architecture (APSA) structures including the DCoC have been developed, if not always effectively, over recent decades. Although somewhat in retreat, they represent progress and provide some useful coordination channels and shared norms. A leading regional economic community (REC), the Intergovernmental Authority on Development (IGAD) survives and while clearly a struggling forum, it can at times play a constructive role. Because most of this REC – all but a few member

states (South Sudan, Uganda) – are clearly RSA countries, IGAD has the potential to serve as a platform for RSA matters. (With Kenya as an IGAD member, the REC can also consider adjacent areas of the Indian Ocean). RSA countries rely on international norms – regulations, functioning energy markets, the general political alignment of states near an energy hub, and so on – in order to become successful energy suppliers. And the United States still has some influence in the RSA. The 2020 US elections, for example, brought to power an administration that has tried to normalize relations in the region, accounting in part for the de-escalation of rivalry between Türkiye and the UAE. Western policy can set some parameters for what is possible for middling and regional powers in the RSA, even as their influence grows. Yet the international order has come up short in the RSA. Three of the world’s largest and deadliest wars in recent years – the conflicts in Ethiopia, Yemen, and Sudan – have raged in the region without resolution. The larger arena also features the Syria and Libya conflicts, as well as the decades-old problem of Somalia and the recent violence in Israel and Gaza. Meanwhile, Somalia, Ethiopia, Yemen, and both Sudans are host to long-running separatist movements within their borders. The UN used to provide mediators to RSA conflicts, but at present it often sends observers to places like Ethiopia and Sudan. The international order has not been able to manage climate change and weather-related disasters; it has not defined a ‘climate migrant,’ for instance, though the RSA is expected to face growing migration challenges. Western influence is also waning due to the inability of the international order to deal with catastrophic loss of human life in Ethiopia, Yemen, Sudan, and now Israel and Gaza. Many observers feel the West, as yet unable to deal with its own major failures in Iraq and Afghanistan, has adopted a posture of indifference to conflict and suffering in the RSA – the very posture so criticized by Africans that it led to the African Union (AU) principles of non-indifference. China, meanwhile, has a much smaller presence than the United States in the RSA, but its investments are so long-term in intention, it is hard to see at present whether they are working or not. Under these conditions, it is difficult to speak of ‘enhancing security,’ since there is arguably so little security upon which to build. Most importantly, global powers appear to get what they need out of the RSA even if it is in distress. The international order seems able to tolerate the RSA’s many lethal conflicts and fragile/failed states so long as the resources flow and global trade is not disrupted. However, this is not a recipe for long-term stability and security. It is also no credit to the international order.

RED SEA ACTORS

RSA security is being fashioned primarily by middle power maneuvering. The weakening of the international order manifests in the RSA as a lack of multilateralism, which is revealed in the failure of multilateral peace-making efforts to resolve the region’s many conflicts. Today the RSA is, for all intents and purposes, apolar. As a result, the arena is caught in a complex web of interplay of open and shadow diplomatic agreements made by lobby groups, intermediaries, and proxies funded by rival actors. Major shifts in regional relations are altering what is possible in the RSA. A non-state movement like Ansar Allah, even if Iran-linked, firing missiles over KSA territory to strike Israel would have been inconceivable a decade ago, but it is happening now. The landscape is changing. There are tensions over very concrete concerns, such as basing rights, maritime boundaries, and exclusive economic zones (EEZs), which are not finalized or mutually agreed in all cases in the RSA. Long thought of as primarily economic and transactional in their RSA approach, the Gulf states are following long-term political and strategic purposes in their interactions and investments as well. The scope of their capabilities and the limits to Gulf state

actions in the RSA should be traced; the external and internal dynamics of these countries should also be tracked, as they drive key actions shaping the region. Of the RSA's roughly dozen and a half states, about a third are significant middle powers that ultimately determine events in the region: they are Egypt, Ethiopia, Iran, Israel, KSA, Türkiye, and UAE. These players, in combination with other regional states and some VNSAs, have varied perspectives, bargaining means, and capabilities (including disruptive capabilities). In general, certain actors – Egypt, Israel, KSA, and UAE (as well as Qatar) – are the 'movers' whose innovative actions are often chased by others, thereby changing the security dynamics of the RSA.

The KSA-UAE rift is reshaping the RSA. Ten years ago, KSA and the UAE were largely aligned. They were on the same side in Yemen (against Ansar Allah and Iran) and in Libya (with Khalifa Haftar and against the Libyan government and Türkiye), as well as against Qatar in the Gulf Cooperation Council (GCC) during the Qatar diplomatic crisis. Now, however, there is a split, and that rift is reshaping the RSA. KSA, a G20 member and the world's top oil exporter, is an anchor state of the RSA that is aiming for long-term stability and predictability, whereas UAE has become a disruptive force. KSA faced setbacks in the Yemen War and is focusing more on shaping its Red Sea coast and acting within the RSA. Riyadh is making a bid to update its role: if hydrogen does become a major alternative energy source, it will be with involvement by KSA (and Egypt) and to its benefit. Mohammed Bin Salman (MBS) has staked his future on Neom. This will not be just a vanity project, an announcement that receives no follow through, or some white elephant. The massive Neom project is a must for MBS; he needs to make it work for his own legitimacy and his country's future. Neom will also become a significant vector of interaction with Egypt and Jordan. In the next five to ten years, KSA also aims to increase its prestige by hosting the Asian Winter Games, the World Cup, and so on. The UAE under Mohamed bin Zayed Al-Nahyan (MBZ), meanwhile, has shown itself to be an agile investor, more experienced and enjoying an overall better track record of investment and execution in alternative energy projects than the Saudis. The UAE often enjoys the 'first mover' advantage. The UAE is currently winning the influence game in the RSA, and the UAE's many commercial interests, including DP World, are being served through their dominant activities along coasts and in ports like Sokhna, Bosaso, Berbera, and (until the late 2010s) Djibouti. The UAE has also advanced its position by funding proxies, spending millions on militias in Yemen (in part in hopes of securing shipping lanes and perhaps a port there) and funding proxies in Sudan (as well as flying supplies into and gold out of Sudan via a remote airbase in Chad). UAE activities have caused trouble for KSA. In hopes of restoring order, KSA developed the Red Sea Council (RSC) on the model of the GCC, but it excluded the UAE and other rival RSA countries from membership. The KSA-UAE split continues to play out in particular countries. For example, Djibouti has a deeply personal and bitter court case against UAE's DP World, and so Djibouti has strengthened ties to KSA. The KSA-UAE rivalry, and the MBS-MBZ contest, is also playing out in Egypt's foreign policy domain.

Egypt is charting a middle road in its foreign policy. Egypt is embattled, surrounded by conflicts on its borders with Libya, Sudan, and Gaza. Its peace with Israel is likely to hold, but it could have trouble relying on KSA and UAE going forward. Egypt has major fiscal challenges and cannot sustain its internal subsidies, but it may no longer be able to secure deposits in its banks of funds from either KSA or UAE, countries that might still invest in Egypt but will probably hesitate to lend it money. Egypt will come under increasing pressure to finance wheat

purchases to provide bread to its people, yet it could default on its debts in the coming months. Its influence abroad is waning. Gulf states are clearly replacing Egypt in the Horn, for example. Water politics are another international concern for Egypt due to the GERD, which may reduce water access during droughts caused in part by climate change. The 2011 Arab Spring distracted and weakened Egypt, which allowed Ethiopia to finally complete the GERD dam plan that it had been developing since the 1960s. Egypt has failed to get a binding agreement about the GERD, and there is potential for conflict, since the long-standing colonial agreements are disliked by many countries affected by the Nile Basin, including Ethiopia, which does not feel bound by a treaty it had no hand in creating. Egypt is also seeking a path between the West and Russia on the international stage. Abdel Fattah El-Sisi looks for external legitimacy by playing on Western fears of terrorists/migrants and serving the counterterrorism and migration policies of the West, while also collaborating with Russia. Egypt has long been a strong US ally and part of the international security architecture, but the year 2013 brought Egypt's military back to governing Egypt, which in turn meant strained relations with Washington for a brief interlude. Egypt has been hesitant to choose sides in the Ukraine War. *Russia Today* is working overtime in Egypt, and when Russia invaded Ukraine, Cairo initially planned to offer weapons to Moscow rather than to Kyiv, as the West had hoped. The 2023 Israel-Gaza war has put the West's reputation 'through the floor' in Egypt and hastened Cairo's adoption of a narrative that a new multipolar world is dawning, one that will increase Egypt's freedom.

Egypt's domestic uncertainties could become a major disruption for the RSA. On paper, Egypt looks like a powerhouse. It is Africa's third most populous country and the second largest producer of natural gas. It has licensed huge exploration blocks in the Red Sea, and it recently discovered massive gas reserves in its Mediterranean waters. Egypt is also a rising player in green hydrogen, and it wants to become a regional energy hub with a new industry that captures the value chain, employs its citizens, and raises its GDP. Egypt has ports and bases along its Red Sea coast, and it foresees Ain Sokhna as a regional center where ships could stop for fueling. In reality, however, Egypt faces overwhelming challenges to achieving its objectives. To become an energy hub, Egypt will need to restructure its economy and enhance its governance of the marketplace. It will also need to secure fertilizer, food, and water for its people. As past Egyptian rulers have learned, political stability can quickly disappear if the government cannot provide for basic needs and 'keep the lights on.' At present, Egypt is not able to meet its own energy requirements and remains heavily dependent on Israeli gas. It also has precious little capital to build its desired future. Egypt has virtually no hard currency and has run out of money, meaning it will need external funding to continue pursuing its strategy. And other challenges loom. Demography is one – the country has a very large and rapidly growing youth population, and about 95% of people live on just 5% of the land. There is an enormous wealth gap, and factors that contributed to the Arab Spring uprising (e.g., absolute poverty and deficits in health, education, and other services) persist: they may have actually worsened since the uprising. The value of the Egyptian Pound has dropped right alongside Egypt's average age. The space for dissent and civic expression is extremely narrow, and the population seems tired of activism. Egypt is witnessing outmigration, and the Ukraine War will likely continue to mean serious food shortages and shocks. It is unclear what might trigger political uprisings among Egyptians so young and so new to politics that the Arab Spring is hardly in living memory. Protests about Gaza transformed into anti-Sisi protests, for example. Meanwhile, it can seem at times that the military complex running Egypt believes the state's purpose is to serve the military. The

government is ill-suited to take the country into the future by sparking an innovative economy or leading in climate adaptation, for example. Sisi recognizes these needs but deploys them to fend off criticisms with the threat that weakening his rule would lead to chaos. For Sisi, Egypt's systemic problems mean 'leave me alone.' Egypt does little to shape population growth or to improve food production, basically settling for irrigating more and more land, rather than conserving water or exploring new technologies, better agricultural techniques, or thoughtful crop diversification and balancing (more wheat, less cotton or oranges, for example). All of this paints a picture of an Egypt that is quite fragile. Some commentary engages in wishful thinking about these overwhelming challenges forcing the Egyptian regime to ultimately improve its ways. Whether the regime changes or not, there are real reasons to worry about the stability of this major RSA country.

Türkiye and Iran can be spoilers if they are not brought into RSA dealings. Despite being at a greater geographic distance from the Red Sea, these two major Middle Eastern powers have influence in the RSA. For Türkiye under Recep Tayyip Erdoğan, the RSA is both important in itself and as another arena for its Middle East and Africa policies, especially as an extension of its plans for the Eastern Mediterranean. Türkiye has been savvy in positioning itself within the fluid arrangements of the RSA's middle powers. In the 2010s, Türkiye worried Egypt, KSA, and UAE with what seemed to be an emerging Turkish 'triangle of influence' through three bases: one near Doha, Qatar; the largest Turkish overseas base in Mogadishu, Somalia; and a planned renovation of the Ottoman base at Suakin, Sudan. But things have changed drastically in the 2020s. The fall of Omar al-Bashir in Sudan scuttled the Sudan basing plans, and Qatar has played a less prominent role in RSA affairs in recent years. Ankara therefore made a calculated pivot: while remaining close to Doha, it has repaired its relations with Abu Dhabi and Riyadh. In fact, Türkiye and the UAE appear to have found common interest in some areas in the Horn. Türkiye supported the UAE's backing of the Ethiopian government, and Ankara deployed Turkish drones and trainers to support the Federal government in its war with Tigray. Türkiye has also taken steps to ease tensions with Egypt, restoring diplomatic ties and working to see that the Muslim Brotherhood tones down criticisms of Sisi. Ankara has continued its soft power investments in scholarships, aid, media, and embassies in the RSA. These new alignments give Türkiye leverage if its Gulf relations do not work out. Iran, meanwhile, sees the RSA as another zone for its shadow war with Israel and the West, through its partner Ansar Allah and its sea assets. Perhaps because it does not have many commercial interests in the RSA, Iran's role is routinely overlooked. Tehran is invested in the RSA by exploiting conflicts in the region and using the arena as a site for influence and for managing harm to its adversaries.

Eritrea's brittleness and its president's eventual demise could draw the RSA into a regional conflict. Eritrea, the least studied and least understood country of the RSA, has one constant: its president. Isaias Afwerki has demonstrated an ability to thrive amidst instability. Eritrea has lived through successive wars with its neighbors, including two major conflicts (in 1998-2000 and 2020-2022). A sense of being embattled is central to its national identity, and at this point, war is part of the national mythos. Some argue that Eritrea is a modern-day Spartan state that since 1998 has been in a permanent state of emergency and on a war footing. This setting helps maintain the status quo. Hundreds of thousands of young people are preoccupied within the ranks of the army, and the country has greater regional influence and importance in moments of instability than stability. There is no significant internal threat to Afwerki's authority. The

opposition is weak, divided, and confused. The military's talented generals have been eliminated or fled, leaving in place loyal septuagenarians who are starting to die off. Efforts to groom Afwerki's son look questionable, and in reality, there is no succession plan. When Afwerki dies, the country may follow the path of Zimbabwe after Robert Mugabe, with a regime that tries to clampdown and avert real change. Such a successor regime might hold for a time, but it could be quickly overthrown. It may also happen that Eritrea directly teeters and topples, creating instability, uncertainty, and room for middle and regional power intervention. In some ways, the most likely mechanism for change is from outside the country, whether from a returning diaspora that generates churn or from armed intervention from abroad, which could lead in turn to several countries intervening. Any of the above scenarios could have profound implications for Red Sea maritime security – Eritrea has maintained very effective control of its long and strategic coastline for many years. Ethiopia is probably the most likely actor to intervene. Ethiopia had hoped to work with Eritrea in recent years but Abiy Ahmed no longer trusts Afwerki, and lasting peace between the countries never seems to pan out. If a conflict starts and if Ethiopia gets involved, it would probably be condemned but no significant action would be taken by outsiders, because the weight of international opinion would welcome a regime change in Asmara. But other countries would also likely intervene. Afwerki does not trust his position in the international and regional order, and he plays actors against one another – courting Egypt to balance Ethiopia, working with KSA against UAE, etc. The West has little leverage and cannot count on 'sub-contracting' any diplomacy with Eritrea to friendly actors like KSA. If collapse comes, Sudan will almost certainly become involved, as will KSA along with Ethiopia. These three countries could create a de facto split – with Ethiopia taking the mainly Tigrayan Christian inland mountains, Sudan seizing the western lowlands, and KSA taking the predominantly Muslim coast. Who could rule Eritrea the 'day after' such events? Perhaps no one. The highland-lowland divide in Eritrea is strong, and hundreds of thousands of Muslim lowlanders may want payback after years of highland rule. Refugees across the line in Sudan, in Kassala State, are waiting to return. There might also be serious Salafist inroads in Eritrea's Muslim communities, which could change the dynamic of any future conflict. So many unknowns remain about the internal politics of Eritrea. Some sort of care-taker military government may very well be the most likely and most positive next government after Afwerki, but it would have to manage these vested middle and regional powers' interests, as well as serious internal governance challenges.

Tensions between Addis Ababa, Tigray, and Eritrea could further destabilize the RSA.

Unresolved differences between the political class in Addis Ababa, Mekelle, and Asmara have led to violent conflict for decades. Two of the three parties have tended to align against the third, with alliances shifting over time. The possible outbreak of another war between Ethiopia and Eritrea should not be underestimated. The world overlooked the possibility of war before and failed to predict the conflict. At this point, there are three actors – Ethiopia, Eritrea, and the Tigrayans – that are at constant loggerheads, all in a constant search for an alliance of two against one. Peace talks in Dar El Salam and elsewhere are in some ways steps within the conflict. The peace agreement signed in the Gulf between Ethiopia and Eritrea was arguably a political agreement to marginalize the Tigrayans, then it morphed into a military alliance. That agreement included a commitment for rehabilitating ports like Assab, which the UAE used as a base and staging area for operations. But Afwerki has vetoed Assab's use by Ethiopia, perhaps understanding that once the border is opened, the port could not be fully controlled by Asmara. The Pretoria agreement between Ethiopia and the Tigray Peoples Liberation Front (TPLF),

meanwhile, is actually an alliance for a new war. Many in Tigray have raised their level of ambition to carving out an independent state that includes Eritrea, Massawa, and Western Tigray. But the TPLF is presently Abiy's only ally, and the TPLF (and the Tigray Defense Forces [TDF]) will not want to fight simultaneously in Amhara, Western Tigray, and Eritrea. Abiy's approach to the Oromo Liberation Army (OLA), meanwhile, aims to get Oromo under Addis Ababa's control so that Ethiopia can fight Eritrea without anyone 'at its back.' The dangers from internal dissent within Ethiopia are serious. Though it defies predictions of collapse, the country is fragile and there is a risk of a balkanization of Ethiopia, with only a 'palace' remaining in Addis Ababa. A landlocked giant, Ethiopia desires to be self-sufficient in fertilizer for food production and to advance in industrialization. These factors help explain its recent aggressive announcement about the need for a port. Abiy is very serious about this goal and sees it as part of his legacy and a way to project Ethiopian power. He is testing the water by announcing his intentions and monitoring reactions. Addis Ababa may be eyeing Eritrea for that purpose, as it is the most obvious option. Ethiopia can present justifications for its right to a port there through international laws about port use in successor states, as well as historic links in Abyssinia. It is significant that for Ethiopia, Eritrea is part of the motherland. Djibouti is another port possibility, as Ethiopia can argue that ethnic links among the Afar justify cross-border sea access for that community. Somaliland is yet another possibility. Eritrea, meanwhile, is ready for a further round of combat. Afwerki sees fighting for his nation as his God-given role, and he intends to stay in power for life. He will resist any new war from Addis Ababa, and it will serve to keep his 300,000 strong army mobilized and engaged, even if Ethiopia would win in any long contest of attrition.

The Israel-Gaza violence and other recent developments will have major impacts on RSA security, but the ultimate outcome remains to be seen. The Hamas attacks of October 7, 2023, and the subsequent Israeli war in Gaza are reshaping the RSA. There has been a remarkable 'contraction of geography.' Many facets of conflict are emerging in the RSA. Ansar Allah in Yemen has launched rockets at Israel, the longest missiles ever fired in anger by the group, and some of these rockets have been intercepted by KSA and by Israel. In many ways these are unprecedented events. The Red Sea is one of Israel's strategic priorities, particularly with the port of Eilat as its 'back door.' More broadly, the shadow war between Israel and Iran continues and may escalate into and around the Red Sea. The Yemen conflict is paused but all belligerents retain a presence there (including KSA through its ties to the Yemeni government). It is hard to foresee who will invest in Yemen even if Ansar Allah fades. Any new Ethiopia-Eritrea war could divide the Gulf states and drag other actors into conflict, disrupting agreements and energy investments. Somalia will begin drilling for oil in 2024, and oil disputes in the Ogaden could spell trouble for its relations with Ethiopia. The RSA could also become entangled with the dynamics of Central Africa, North Africa, and the Sahel. For example, the Rapid Support Forces (RSF) in Sudan under Hemedti (Mohamed Hamdan Dagalo) have reportedly received aid through the Central African Republic and Chad and received money and supplies from Haftar in Libya. Gulf states' decision not to condemn or stigmatize coup plotters and leaders, like those in Niger, also sends a message to African forces and leaders in the RSA. So-called jihadists and other VNSAs might resurge, taking October 7th as an inspiration. In Somalia, a new wave of attacks could boost Al-Shabaab, which might finally take control of Somalia, as the African Transition Mission in Somalia (ATMIS) struggles to ensure its funding, mandate, and mission.

RED SEA ENTRY-POINTS

RSA nation-states must build capacity for strong cooperative security architectures in the region. There is a crisis of multilateralism in the RSA. Conflict and competition, especially among middle and regional powers, is putting common security under duress. Special envoys to the region, especially those accredited to the African side of the RSA, struggle to be effective, in part because they do not enjoy the robust staffs, expert advisors, and other resources and capabilities required to truly understand the situations they are entering. Special envoys have not been able to make peace in Sudan, Ethiopia, Yemen, and so on. Relations remain largely bilateral and ad hoc, rather than comprehensive. The RSA seems to be entering an age of ‘mini-lateralism.’ Some ‘mini-lateral’ initiatives may offer hope, such as the Jeddah talks on Sudan or the Somalia Quint efforts. Pre-existing multilateral institutions, including the International Maritime Organization (IMO) and DCoC, may no longer be driving the pace of events: decisions are generally made by a small number of connected leaders and stakeholders. However, the larger multilateral structures might still function well in specific areas (e.g., DCoC information sharing) and deserve additional support. If correctly configured, they can complement the newer ‘mini-lateral’ initiatives. A fully resourced RSC, for example, has significant potential to manage future tensions and to spur cooperation that would benefit regional and global actors. Through it consultations could be carried out with KSA and other key states on the RSA’s varied needs and ways forward.

Western actors would do well to articulate their goals in the RSA more clearly. Within the RSA, the West can be seen as ambiguous and unfocused. Is its key objective democracy, self-advancement, strategic competition, stability, something else? Different goals are stressed at different times, in different places, and through individual initiatives, in ways that can risk appearing contradictory. Western actors such as the United States have arguably struggled to conceptualize the RSA holistically, and their piecemeal investments tailored to one security concern can overlook corollary impacts. For example, counterterrorism cooperation with Sudan has not necessarily helped comprehensive security to emerge in that country; it may have in some ways undermined it. Moreover, security cooperation can at times look like support to a fragile and oppressive government, provided primarily to keep terrorists and migrants in place, even as crippling sanctions are enforced and democracy is demanded. The added value of Western actors in the RSA is less clear than before, and the EU’s role is in question. Key interactions take place in the region without the Europeans. Today, capable and proactive Gulf states deal directly with African governments in the RSA without intermediaries. Europe will continue to need the RSA, however, for critical minerals, oil and gas, supply routes, and so on. More work must be done to identify the EU’s comparative advantage; developing a refreshed approach should be a priority. Investments will also be key. For example, the days of under-resourcing bureaucracies that are inherently ill-equipped to approach the RSA in a joined-up manner should be limited.

Western actors need to find targeted, cost-effective opportunities to invest in RSA security. The multilateral institutions and initiatives ongoing in the RSA require resourcing, but it is unclear, with world attention directed toward Ukraine and elsewhere, that these funds will be forthcoming. Even as the West continues to identify entry-points for greater collaboration, such as working against IUU fishing or monitoring/governing unmanned seaborne vehicles, a stronger

focus will be needed on cost-effective measures and on priority interventions in times of competing crises and tight resources. Bringing Egypt into the Combined Maritime Forces (CMF) and Combined Task Forces (CTF) 153 has been a positive development. There may be ways to combine ship use by EU operations in the Gulf of Aden and in the Persian Gulf. Entry-points for Western support and improved cooperation could also include using unmanned vehicles to tackle IUU fishing, adjusting the mandates of different EU missions to increase overall coherence, and focusing on specific common concerns, such as trafficking in persons or drugs. The DCoC and IGAD Task Force on the Red Sea and Gulf of Aden offer opportunities to build capacity in a coordinated fashion and to boost projects that are practical but underfunded. Equally, these platforms present opportunities for de-escalating with potential rivals.

Conclusion

Since the conference was convened, events have further underlined the dynamism and instability of the RSA. Israel's war in Gaza has sparked mass protests across the RSA and evoked condemnations by regional governments. Further afield, the government of South Africa launched a case against Israel at the International Court of Justice (ICJ), claiming that 'genocidal acts' have been committed. In early December 2023, Ansar Allah in Yemen announced that it would target all shipping in the Red Sea until 'the entity' (Israel) ceases military action and permits entry of humanitarian aid to Gaza. To date, the group has scored notable successes via sea-borne, drone, and missile attacks, including against Israel itself. In response, a US-led counter initiative, Operation Prosperity Guardian, was announced in January 2024. So far, the outcome has been uncertain. Ansar Allah attacks have continued, including (it is claimed) against US and UK naval vessels, leading to a US-UK strike on Yemeni territory. A significant portion of maritime traffic, including shipping by major companies such as Maersk, has re-routed away from the Red Sea. At the same time, Iran and Lebanon, presumed allies of Ansar Allah, have seen attacks on their territory, claimed by or attributed to Israel and the United States. The Government of Iran, Hezbollah in Lebanon, and Ansar Allah leadership have issued stark warnings, underscoring their readiness to see off any military action against them. In the case of Ansar Allah, the group has threatened reprisals against US and UK assets. The prospects seem equally matched between further escalation and de-escalation. While attention has been focused on Israel-Gaza questions, a bilateral deal between the Federal Government of Ethiopia and separatist Somaliland has been signed. It provides Ethiopia with coastal access without the involvement of the Federal Government of Somalia, raising the prospect for recognition of Somaliland independence. With regional structures such as IGAD underperforming and the UN and major powers focused on other crises, conflicts, and concerns, RSA parties are for now left to wrangle, potentially drawing in Eritrea as tensions rise. Of the ten conflicts to watch in 2024 (identified by International Crisis Group), it is perhaps no surprise that four – Gaza, Greater Middle East, Sudan, and Ethiopia – lie within the RSA.

About the Authors

Mr. Simon Rynn is Senior Research Fellow for Africa at the International Security Studies department at RUSI. His experience covers conflict prevention and peacebuilding, stabilisation, security and justice, de-mining, humanitarian, governance and small arms control. His main research focus is on the security of East Africa and the Horn, particularly the security sector, external engagement with stabilisation and peace support operations, as well as economic security and the relationship between security and international development. Simon holds an MSc in International Relations from the London School of Economics and Political Science and a BA in Philosophy from the University of Leeds, UK.

Dr. Benjamin P. Nickels is Professor of International Security Studies and Director of the European Security Seminar – South (ESS-S) at the George C. Marshall European Center for Security Studies. He leads the Marshall Center’s resident, outreach, virtual, and partnership programming on European and U.S. relations with North Africa, Sub-Saharan Africa, and the Middle East.

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