1. A New Horn. Still Thorny

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The Horn of Africa at the Beginning of the 2020s

The Horn of Africa (HoA) is going through a delicate time of change, both actual and potential. Processes that originated in Ethiopia have been shaking the country while also generating repercussions across the region at large, a reflection of both Addis Ababa's heavyweight role as well as of the deep interconnections that historically characterise states and societies in the area. After a long period during which regional developments were essentially shaped by the legacy of the 1991 events – if definitely not without a rich texture of new and unpredictable occurrences ever since – the Ethiopian leadership transition of 2018 opened up an entirely new phase, dense with both promise and uncertainty. Where this new phase will lead to is bound to affect – and to be affected by – not only domestic and regional dynamics, but also the international relations of a region whose strategic relevance is like no other's in Africa.

A number of quite extraordinary features have long made the Horn an outstanding region in the continent and beyond. A land straddling Africa, the Middle East and Asia, it shapes a key shipping route between Asia and Europe – the shortest, cheapest and busiest – via the Indian Ocean, the Gulf of Aden, the Bab el-Mandeb Strait and through the Red Sea, all the way to the Suez Canal, whose opening, one hundred and fifty years ago,

had crucially increased the importance of this sea lane. A naval itinerary China's Maritime Silk Road initiative is currently adding extra relevance to. But the region's geographic location also makes the Horn a major access gate to African markets in the Eastern part of the continent and further inland, for Asian and Arab states in particular, prompting developments in a wide range of sectors, from agriculture to industrial de-localisation, from ports and railway facilities to ICT and submarine cable connectivity.[1] In addition, proximity to multiple crisis scenarios – notably jihadism in Somalia, the Yemeni civil war, and piracy in the Indian Ocean (the latter drastically declined due to international patrolling) – raises external interests and stakes in what goes on in the area and along its coasts. Saudi Arabia and its Gulf allies, for example, see Eritrea and other Horn countries as key partners in ensuring control and security on the Western side of the Arabian peninsula, particularly with regard to the Saudi-led intervention in Yemen. Similarly, Ethiopians are the United States' established regional ally in countering Somali armed fundamentalism. Thus, complex local developments and growing international attention make this a region of great dynamism that demands constant effort to monitor, analyse and understand it.

The Horn of Africa is a roughly triangle-shaped peninsula that primarily consists of Ethiopia, Eritrea, Somalia, and Djibouti. Sudan is at times added to the four, as are on occasions Kenya, Uganda and South Sudan within a "Greater Horn of Africa" notion. The eight are the members of IGAD – the Inter-Governmental Authority for Development –, the sub-regional organisation officially-recognised by the African Union and tasked with addressing common issues in three key priority areas, namely food security and environmental protection; economic cooperation, regional integration and social development; peace and security – a short inventory of the many deep, structural challenges the region faces.

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[1] See, for example, Oxford Business Group, "Djibouti to utilise geostrategic location to develop ICT connectivity hub", 2016.

In substantial tracts of the HoA, development progress has long been limited, with today's living conditions in some countries arguably worse than they were in the past, particularly for war-torn Somalia and reclusive Eritrea. Food security remains an issue across the area, partly because the latter is especially vulnerable to substantial climatic and environmental threats. Worldwide, the last two officially-declared famines occurred in this area (Somalia in 2011 and South Sudan in 2017), which is also often subject to flooding and, in 2020, saw the vegetation, agriculture and pasture land of vast zones ravaged by the worst locust infestation in 70 years. Meanwhile, the population has been rising fast, along with urbanisation processes, increasing the pressure on land and water resources and feeding into social tensions, particularly in Ethiopia, a country of over 110 million people and by far the region's demographic giant. Primarily driven by limited economic prospects, political repression and instability, contemporary migration from the Horn has also been very substantial – north-eastbound towards Arab countries, northbound towards north Africa and Europe, and southbound towards South Africa. Finally, domestic tensions between different groups and communities, and transnational ones between states and nationalities, have historically crisscrossed the entire Horn, frequently escalating into inter- and intra-state conflicts.

As much as its countries are the prized target of external attention, the overarching feature distinguishing the Horn from much of the rest of Africa is the prevalence of regional dynamics – largely drawing from past events and historical patterns – over pressures originating from outside the region, with competition for state territories and boundaries more intense than anywhere else on the continent. The Horn hosts the one non-colonised African country – Ethiopia, which was able to defeat the Italians in 1896 and was only briefly occupied by them some forty years later – as well as sub-Saharan Africa's only large, 'classic' interstate wars for territorial annexation (between Ethiopia and Somalia in the late 1970s and between

Ethiopia and Eritrea in the late 1990s). It is also home to the only case of a fully collapsed state (Somalia) and the first case of successful secession on the continent (Eritrea, with the only other one not far away, namely South Sudan).

Numerous motives thus make the Horn's evolving scenario relevant beyond the region as such, both as a key area for Africa's development and stability as well as for international trade and geopolitics.

Post-1991 Political "Order"

The beginning of the 1990s was a revolutionary, defining moment for the politics and development of the contemporary Horn of Africa.[2] The end of the Cold War coincided with a time of major political destabilisation and fragmentation, including state reconfigurations and regime changes, as well as the emergence of entirely new regional and external relations in a context that, following Soviet disengagement and America's loss of interest, initially saw the relevance of the HoA decline.

In Ethiopia, Mengistu Haile Mariam's *Derg* regime, in power since 1974, had been weakened during the 1980s by the military defeats suffered at the hands of the Eritrean People's Liberation Front (EPLF), by the end of Soviet support, and by two successive famines. It was eventually brought down on 28 May 1991 as a result of parallel insurgencies by the EPLF and the Tigray People's Liberation Front (TPLF). The regime that was then established under the Ethiopian People's Revolutionary Democratic Front (EPRDF) – an umbrella organisation for a Tigrayan-led coalition – turned out to be one of Africa's most successful development stories of the past thirty years – with annual growth rates to the tune of 9% for the entire 2000-2019 period – if long criticised for only allowing a strictly-controlled

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[2] Cf. M. Guglielmo, *Il Corno d'Africa. Eritrea, Etiopia, Somalia*, Bologna, Il Mulino, 2013; and C. Clapham, *Horn of Africa. State formation and decay*, New York-Oxford, Oxford University Press, 2017.

opening up of the political sphere. Economic progress was not primarily driven by any mineral or energy resource wealth, but from the firm implementation of a pragmatic, hybrid development model for which comparisons have often been drawn with Asia's "developmental states". Relying on an established tradition of functioning state institutions and bureaucracy as well as on an ethnic federal set up as the chosen strategy to address its complex domestic diversity,[3] the new government in Addis Ababa retained not only monopolistic control of key economic sectors – notably energy, telecoms, logistics and airlines – but formal ownership of the country's land too. The latter also aimed to limit speculation on land and the related risk that, if dispossessed of land, Ethiopia's massive and fast-growing rural population would be driven towards urban centres at an unsustainable pace. Reviving agriculture and agricultural exports by supporting both small farmers, particularly in the highlands, and large commercial enterprises in the lowlands was central to the regime's strategy of Agricultural Development-Led Industrialisation (ADLI). Large investments were meanwhile undertaken to develop Ethiopia's physical infrastructure, particularly the transportation network (roads and railways), as well as industrial parks and energy plants.[4] The strategies adopted essentially paid off. Besides the impressive national growth rates, absolute poverty was also dramatically reduced, from about half of the population in 1995-1996 to a quarter of it twenty years later, in 2015-2016.[5] The fight against destitution has been a constant concern and a priority in the national budget, as manifest in efforts to promote food security as well as health and education. Overall, the EPRDF was able to move beyond its Marxist roots and, while retaining

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[3] C. Clapham (2017), pp. 65 ff.

[4] J. Mosley, Ethiopia's transition: implications for the Horn of Africa and Red Sea region, SIPRI Insights on Peace and Security, 2020/5, March 2020, pp. 9ff.

[5] T. Woldehanna and M. Araya, "Poverty and inequality in Ethiopia, 1995-1996 and 2015-2016", in F. Cheru, C. Cramer and A. Oqubay (Eds.), *The Oxford handbook of the Ethiopian economy*, New York-Oxford, Oxford University Press, 2019.

the hegemonic role of a vanguard party firmly led by Meles Zenawi, who managed to assert his leadership in the 1990s and to consolidate it in the subsequent decade, to adopt a pragmatic and adaptable approach towards both domestic as well as external issues.

The emergence of a new Ethiopia went hand in hand with the birth of Eritrea. The coastal region had been annexed to Ethiopia in 1962, putting an end to ten years of "federation", which spurred the creation of armed liberation movements. Isaias Afwerki's Eritrean People's Liberation Front ultimately came to control the region's territory and, with the collapse of the *Derg* regime in Addis Ababa, set up a new, separate state in 1991 that formally became independent via a 1993 referendum. Despite a relatively more promising beginning, Isaias's regime saw a gradual deterioration in relations with Ethiopia. This escalated into fully-fledged war – independent Africa's worst international conflict based on death toll – between 1998 and 2000. The end of the war did not imply a normalisation of Ethio-Eritrean relations, rather the opposite. The strains between the Horn's largest state and its comparatively tiny neighbour remained and dragged on for twenty years. Eritreans were the main casualties. While Ethiopia aptly manoeuvred to have Asmara internationally isolated – including by twice managing to have the UN impose sanctions on it – Isaias' regime used the rhetoric of an external existential threat to build an increasingly secluded and cruel state. A period of economic fragility and declining prospects ensued, resulting in massive flows of people fleeing the country's dire political and socioeconomic living conditions, year after year.

Several developments in contemporary Somalia have been a quintessential denial of Africa's post-colonial expectations. Long seen as one of the most viable states on the continent as the vast majority of the population shares a language, religion and lifestyle, the country's institutions and society have actually fragmented since the 1980s, following armed reactions to Siad Barre's repressive and discriminatory regime.

Somali's traditional clan-based structure and relations did not prove a sound constitutive element on which to build, as they ultimately nurtured the ever evolving nature of the country's identities and identity politics.[6] Siad himself fled the capital Mogadishu at the beginning of 1990, notoriously leaving the country with no central government at all. One of sub-Saharan Africa's most ambitious independent nations – the only one that renounced a continental agreement to accept and stick to inherited colonial borders, and openly claimed parts of Ethiopian, Kenyan and Djiboutian land – was turned into the most classic case of a failed state. Despite significant progress, it has essentially remained so ever since. The long process of reconstructing a national government and infrastructure was not simply challenged by breakaway Somaliland in the northwest, but, over the past fifteen years or so, primarily by the al-Shabaab militias operating at the opposite extreme of the country's territory. In the central and southern regions, jihadism has proven a successful mobilisation tool, cutting across clan affiliations and appealing to Somali nationalist sentiment and common Islamic identity as a response to external interference. In a clan-structured society dominated by the elderly, a promise of social change have proven particularly attractive to the youth.

The Federal Government of Somalia, set up in accordance with the 2012 Constitution and led by a president indirectly-elected via a byzantine, clan-based procedure – currently Mohamed Abdullahi Mohamed "Farmajo" –, still struggles to transform its control of the capital and other major towns into a stable and functioning presence across substantial tracts of the national territory. Backing by the African Union's 20,000-strong AMISOM mission, Ethiopian and Kenyan troops, alongside a growing string of drone strikes by the US, has not been enough to terminate the conflict with the jihadists and restore nation-wide stability in Somalia.

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[6] D. Laitin and D. Posner, *The implications of constructivism for constructing ethnic fractionalization indices*, APSA-CP, Winter, 2001, p. 13-17.

A little-known country outside the region, Djibouti has seen its international geopolitical relevance escalate over the past two decades. The smallest among the Horn of Africa's states is also the most strategically located. A potential gatekeeper and launchpad, it lies both where the waters of the Red Sea and the Gulf of Aden meet – on the narrow Bab-al-Mandeb Strait – as well as where the sub-Saharan landmass gets closest to the Arabian Peninsula and thus the Middle East. It is this position that led to a dramatic surge in international attention in Djibouti, transforming it into a veritable military hub (see below) while also emphasising the key role of its port facilities for serving global and continental trade routes. Besides its outward orientation, however, the country ruled by Ismaïl Omar Guelleh for over two decades retains innate and dense relations with all its neighbours – Djibouti shares borders and ethnic ties with Eritrea, Ethiopia and Somaliland/Somalia – in what remains an unstable region.

International Geopolitical Competition in the Horn

The geostrategic relevance of the HoA is primarily structural, rather than a new or recent phenomenon. Yet, since the turn of the millennium both international and African developments greatly raised external interest in the region. Nothing illustrates this better than the crowded foreign military presence in Djibouti, continental Africa's tiniest state after the Gambia and Lesotho and now a veritable hub where several non-African armed forces are stationed. Besides hosting a French military base since independence in 1977, the country today accommodates German and Spanish troops – also in the French base – but, most notably, the largest and only permanent US army barracks on the continent, set up in 2003 and also home to a smaller British unit, as well as, since 2017, China's only foreign military base. Italy has troops too, contributing to the EU anti-piracy initiative in the Indian Ocean, as has Japan (aimed at countering pirates as well as responding to Beijing's growing influence in

the area), whereas Saudi Arabia is in the process of establishing its own foothold. Geopolitical, commercial and military competition has driven the deployment of foreign soldiers to the region beyond Djibouti too, with Turkish troops stationed in Mogadishu, Israel in Eritrea, and the United Arab Emirates present both in Eritrea and Northern Somalia (in Boosaaso, in the Puntland semi-autonomous region).[7]

In the past, the HoA was a ground for confrontation, turns and twists of events between major international powers during the Cold war. The US was originally close to Hailé Selassié's Ethiopia, only to gradually turn its back on the communist regime established after the emperor was ousted in the early 1970s. At that point, Washington became closer to Somalia. The Soviet Union had meanwhile abandoned Mogadishu – which it had hitherto supported to gain influence and control over the Gulf of Aden and Red Sea maritime routes – to become a key ally of Addis Ababa in its response to Somalia's invasion of Ethiopia's Ogaden region. In the Horn, as across the rest of Africa, however, the end of the Cold War led to a decline in the region's relevance.

Today, an expanding number of global, emerging and regional powers have become increasingly engaged in the region. The overarching concern is the protection of key, strategic sea trade routes in a historically turbulent area straddling distinct world regions. That Saudi Arabia was recently forced to temporarily suspend oil shipments through the Red Sea lane, following Houthi rebel attacks on two Saudi tankers, illustrates the point. Even before the Yemeni crisis began, however, international schemes had been launched to counter piracy in the Indian Ocean and Gulf of Aden, including the EU Naval Force (Operation Atalanta). Yet, as Alex de Wall noted, while "all players have a shared interest in maritime security … the mechanisms for coordination and implementation are lacking".[8]

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[7] N. Melvin, *The foreign military presence in the Horn of Africa*, SIPRI Background papers, April 2019.

[8] A. de Waal, *Horn of Africa and Red Sea Synthesis Paper*, Conflict Research Program,

China's Maritime Silk Road initiative further increased the strategic relevance of the Horn of Africa region. Beijing, for whom Eastern Africa represents a natural entry point to the continent, aims at ensuring privileged access to port facilities along the coast for merchant vessels flying its flag. But landlocked Ethiopia is also very much part of the picture, with China having developed close economic and diplomatic ties with the HoA's colossus and providing it with substantial financing for strategic infrastructure, particularly the new Addis-Djibouti railway and the Grand Ethiopian Renaissance Dam currently under construction on the Blue Nile. Energy resources are an additional inducement. The HoA region is not currently a major area of origin for oil and natural gas supplies. But important reserves have been discovered in the Ogaden region, with the gradual stabilisation of the area meaning the prospect of extraction and commercial exploitation is nearer, again with China already on board. Financial involvement in strengthening regional infrastructure and resource potential has come under scrutiny of late for fear that large borrowing on the part of African governments, should the latter at some point no longer be able to meet their repayments obligations, may leave them and their newly built transport, energy or mineral infrastructure prey to Chinese control and pressure.

The region's closeness to the Middle East has exposed its countries to the goals of wealthy Gulf states, driven, on the one hand, by a desire to diversify their national economies away from oil and to improve food security, and, on the other hand, by an effort to expand their political influence in a nearby and increasingly relevant area. They have thus grown prominent among investors in the Horn over the last ten years or so. Industrial and agribusiness ventures, alongside large land acquisitions, have been pursued by many Arab states. Sudan, historically closely linked to them, has been singled out as a major target. The reverberation of Middle Eastern rivalries into

London School of Economics, 2017, p. 13.

the Horn of Africa has been a growing feature of the external presence in the region, pitting the likes of Saudi Arabia and its Arab partners against Iran (the latter, on the defensive, lost its previous allies of Eritrea and Sudan) but also the so-called Arab Quartet (the Saudis, UAE, Bahrain and Egypt) against Qatar, accused of standing too close to Iran and the jihadists. Similarly, Turkey – which gained a solid foothold in Somalia[9] – and Israel have also joined the ranks of those drawn to the area with the aim of earning influence in the region. Egypt, on the other hand, stands as a case apart. Bordering the region, it has a vital interest in the Horn as the source of the Blue Nile, one of the two main tributaries to the river on whose waters the country's population and economy so entirely depend. A dispute about the filling of the new Grand Ethiopian Renaissance Dam, which grants Ethiopians control over the downstream flow of water, has heightened tensions and caused increasing wars of words between Addis Ababa and Cairo, with international mediation efforts failing to help the two strike a compromise thus far.

Besides geographic, economic and political drivers, a human mobility factor is at play too. Migration flows originating from the region have become a major concern for European nations (as well as for some more nearby states, including South Africa). While, in recent years, migrant routes from West Africa via the Western Sahel have attracted the lion's share of media attention, large numbers of Africans hailing from the Horn have crossed the Sahara to reach the southern shores of the Mediterranean Sea via Sudan and then Egypt or Libya. Middle Eastern countries themselves are also major destinations for HoA migration, although, on the whole, they respond to it with relatively more open approaches. Sudan, Ethiopia, Somalia and Eritrea all traditionally have large diasporas. The European Union set up an EU-Horn of Africa Migration Route Initiative (the Khartoum Process) to bring together origin, transit and

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[9] B.J. Cannon and F. Donelli, *Involvement in the Release of Silvia Romano in Somalia*, ISPI, 26 May 2020.

destination countries to cooperatively address migration-related issues. The EU Emergency Trust Fund for Africa, established at the Valletta Summit on Migration in 2015, devolved some €1.9 billion to humanitarian and development projects in the Horn of Africa region to improve local conditions so as to limit migration.

Despite relations with non-African nations often including asymmetric elements, Horn of Africa countries have, to different degrees, repeatedly shown they want their own agendas to be part of the process. At least for a time, for example, Eritrea and Sudan exploited external rivalries to hire port facilities or even their own troops – notably with regard to the war in Yemen – with a view to gaining external support from Saudi Arabia and circumventing international isolation. The very fact the 2018 peace deal between Ethiopia and Eritrea was officially signed in Riyadh testifies to the close relations between Asmara and the Saudi regime. In Somalia, Northern regions aiming at distancing themselves from Mogadishu have worked towards obtaining external sponsorships. Ethiopia, on the other hand, has often travelled a path of neutrality, one of its major mid-term goals being the opening of alternative trade routes to the sea – via Berbera in Somaliland and Assab in Eritrea – that would reduce its heavy reliance on the port of Djibouti.

Another Turning Point for the Region? The Changes Ignited in 2018

Abiy Ahmed's rise to power in Ethiopia was a surprising turn in a complex rebalancing of the political scenario that had dominated the country for the better part of three decades. What over time had asserted itself as the pivotal element of that scenario – i.e. Meles' leadership – vanished with the Prime Minister's sudden death in 2012. Political continuity itself had begun to be questioned with the choice of Hailemariam Desalegn as a new, non-Tigrayan head of government, stripping the ethnic minority that was closely identified with Ethiopia's

post-1991 regime of formal control over the reins of power. The move was forced upon the Tigrayan ruling elite by the need to respond to growing unrest among key sections of the Ethiopian populace who had grown increasingly frustrated as they felt essentially excluded under the existing political settlement. Popular discontent, however, did not abate but rather spread further, particularly among the Oromos – the country's largest community – with major protests taking place in both 2014-15 and 2016-17. The confrontation did not seem to lead to any softening of the regime, as a state of emergency was declared that would last ten months (October 2016 to August 2017) and result in a crackdown and some 11,000 arrests. A second state of emergency followed in the first half of 2018. Yet, the fact that demonstrations had led the government to abandon the controversial Addis Ababa Master Plan – a scheme meant to expand the capital territory and seen by the Oromos as a Tigrayan and Amhara plot that would leave local farmers dispossessed of their land – was not simply unusual. As observers pointed out, the "rejection of official plans by government members is unprecedented in Ethiopia. It is … historic, as it could be seen as acknowledging the legitimacy of the protests".[10]

The deteriorating situation convinced Hailemariam to resign to open the way for a different political solution. Few, however, envisaged this would lead to a figure like Abiy Ahmed taking over. The country's first-ever Oromo Prime Minister emerged as the result of the Oromo and Amhara components of the ruling EPRDF coalescing in a move aimed at dismantling Tigrayan control of the dominant alliance.

Abiy went further as he quickly moved not only to usher in a series of wide-ranging political and economic reforms, but also to dissolve the EPRDF itself and replace it with a new Prosperity Party – with the Tigrayan People's Liberation Front opting for staying out of it – as a platform to run in the election

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[10] "Ethiopia cancels Addis Ababa master plan after Oromo protests", *BBC News*, www.bbc.com, 18 January 2016

scheduled for 2020, which he promised would be the country's first free and fair election. While political space for dissent was dramatically expanded, it did not prevent a new wave of protests from emerging in 2018 and 2019, with a mixture of community clashes and centrifugal demands for the creation of new ethnic regions. A failed coup in the Amhara regional state, in 2019, was a further warning of the risks of a weakening power at the centre. Domestic unrest thus led Abiy to make more assertive moves, apparently in line with the idea that Ethiopia, in the words used by an observer half a century ago, is "a 'tough-man system'. At every level, and most of all in the national central government, it depends on powerful authority figures … In times of imperial weakness, the different elements in the state immediately start to drift apart ... There are indeed roots of national unity … but a powerful man at the top is needed to draw on them".[11] Persisting structural challenges add to the complex evolution of Ethiopia's internal politics, notably huge demographic pressures and key environmental challenges. In its external relations too, the impact of China's slowdown is still to be fully assessed, and growing national debt has also raised concerns.

Ethiopia's leadership transition acquired crucial regional importance the very moment Abiy reached out to Eritrea to strike a peace deal, an initiative that set the entire Horn of Africa on a new course, albeit undoubtedly neither a trouble-free nor a predetermined one. The détente in Ethiopia-Eritrea relations after two decades of latent war – tensions have eased enormously, although the border issue has not been fully normalised – was bound to generate spill-over effects across the region, notably in terms of a possibly broader stabilisation of the Horn and of new potential for regional economic integration, both formal and informal.

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[11] C. Clapham, "Imperial leadership in Ethiopia", *African Affairs*, vol. 68, no. 271, 1969, p. 111.

Addis Ababa itself was quick to induce the Ogaden National Liberation Front (ONLF), up to that point backed by Eritrea itself, into ending a long rebellion in the country's Somali-inhabited South-eastern region. Abiy also assumed a high-profile mediatory role across the region, with involvement in mediation between Eritrea and Djibouti, Kenya and Somalia, as well as in peace talks between South Sudan's warring factions and in domestic negotiations in post-Bashir Sudan.

Eritrea is the country most directly affected by domestic changes in Ethiopia. United Nations sanctions were lifted in late 2018 after almost a decade. To the extent that it seizes the opportunity to adapt its course and end its international isolation, the small coastal state stands to gain both politically and economically. Eritrea and its ports are a natural export and import transit zone for the vast and expanding Ethiopian market. Asmara also agreed with Djibouti to normalise diplomatic relations that had soured since 2008 due to a border dispute. Sudan, on its part, reopened the frontier with Eritrea, which had been sealed in 2018 to stop arms trafficking. But any economic advances will require Asmara to directly address a number of domestic issues, including freeing up the extensive economic and human resources still devoted to the country's defence and removing the constraints that make it the second-worst business environment in the world (only followed by Somalia).[12]

Authorities in Mogadishu also stand to benefit from regional developments in terms of their efforts to stabilise Somalia and expand government control over the national territory. The ample al-Shabaab presence continues to feed the region's most prominent crisis. Since the turn of the millennium, the country has become the ground for a proxy war between Addis Ababa and Asmara, with the former backing the fragile central government, including through participation in the African Union's AMISOM mission, and the latter clandestinely

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[12] See World Bank, *Doing Business 2020*, 2020.

supporting al-Shabaab (which led the UN Security Council to impose sanctions on Eritrea). Following Ethiopia's openings, it did not take long for Eritrea and Somalia to re-establish diplomatic relations for the first time in about twenty years. Isaias Afwerki's first-ever visit to Mogadishu, in late 2018, testified to the new course between the two countries. Any progress in Somalia – home to jihadism and a key source of refugee flows, kidnappings and piracy in the region – would in turn have a broader stabilising effect across the HoA. A degree of stability in Somalia is also a near necessary condition for Ethiopia to exploit the recently-discovered oil and natural gas fields of the Calub and Hilala reserves, in the Ogaden region.

That a new era has been opened is also reflected by the regular meetings held by the leaders of Ethiopia, Somalia and Eritrea since 2018, as they established an alliance aimed at fostering comprehensive trilateral cooperation on political, economic and security issues. The alliance itself may favour Eritrea's return to IGAD after more than a decade, but it also raises questions about the relationship between the new grouping and the wider regional body.[13]

Horn of Africa in the Time of the Pandemic: 2020 and Beyond

The Horn of Africa region, an area in which stability and democracy fared poorly for the better part of the post-independence period, is going through a time of political transformation that was ignited by the domestic leadership transition in Addis Ababa. While the latter ushered in a phase of social and political uncertainty in Ethiopia – including the opening up of the political space and rising ethnic tensions – the Horn region as such appeared to embark on promising processes towards the normalisation and stabilisation of relations

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[13] S.T. Demissie, *Is another regional alliance what the Horn needs?*, ISS Today, Institute for Security Studies, 24 March 2020.

among the countries belonging to it. Then Coronavirus disease 2019 (Covid-19) hit. In an area with a number of structural weaknesses – including endemic poverty, comparative state fragility, and challenging environmental conditions – the potential for the pandemic to become a most dangerous stress test for both domestic as well as regional dynamics is high.

In spite of the initial doomsday expectations, in terms of official numbers, Covid-19 in the Horn has not reached the kind of diffusion and lethality shown elsewhere – at least for now. Numbers of cases and deaths are still relatively low when compared to hard-hit countries in other world regions. The extent to which this is the result of weak testing and reporting or of an actually more limited presence and impact on health of the virus partly remains an open question. In the Horn as in much of Eastern Africa, food security in 2020 has already suffered a hit due the locust invasion.

Besides the health and economic impact, however, the pandemic could have major implications for governance, security and politics. Governments have become more inward looking – their primary concerns being the social and economic impact of the Covid-19 emergency and the responses required to limit the spread of the virus and protect the most vulnerable sections of the population, including the need to implement lockdowns and other measures – with bilateral and regional meetings, diplomatic initiatives, and discussions within the Horn being delayed or placed on hold. Similarly, relations with international donors and multilateral organisations are also suffering a slowdown if not a standstill.

Domestically too, the political price of Covid-19 could potentially be high. In Ethiopia, one major effect of Covid-19 was the postponement of a key election. This immediately spurred further domestic political developments, with opposition parties ratcheting up the pressure to go to the polls and Abiy somehow caught between the need to legitimise his initiatives and rule (the mandate for MPs has formally exceeded the five years envisaged by the constitution, and the PM's stay

in office was allowed to be extended by parliament) and the responsibility not to force through a vote in unsafe health conditions. Frustration and tension have grown, with violence ensuing. The stand-off with Tigrayan regional authorities, in particular, led the federal government to start a military intervention that risks igniting full-scale civil war. Anti-Abiy forces may try and seize this opportunity. Somalia followed suit: it abandoned plans for a definitive return to direct elections with universal suffrage – still difficult to arrange in a highly troubled and unstable country much of whose territory is hardly under government control – and postponed the entire multi-stage voting process for one year to 2021.

This Report digs into the recent developments in the Horn of Africa region, a traditionally highly dynamic area – and one of greatly increased international interest – where the turn of events was initially accelerated by Ethiopia's 2018 domestic leadership transition, before it had to face new challenges due to the advent of the pandemic. The book starts out from this last topic, with a chapter framing and examining the impact of Covid-19 in the region. It then moves on to individually deal with each of the four core Horn of Africa countries. But it does so by inverting what would be a more conventional order. Djibouti and Eritrea are examined first, in an effort to place more attention on them too and to stress how minor players are highly relevant to the political evolution of a historically intertwined region. Attention finally shifts to Somalia and Ethiopia, that is, the two countries that remain, respectively, the most unsettled state in the area and the political, economic and social giant in the region.