Scenari

Report for decision makers

ISSN 2785-3217

N° 9/2026
January



NAVIGATING THE RED SEA CRISIS: MIGRANTS, INFRASTRUCTURE, AND CRIME

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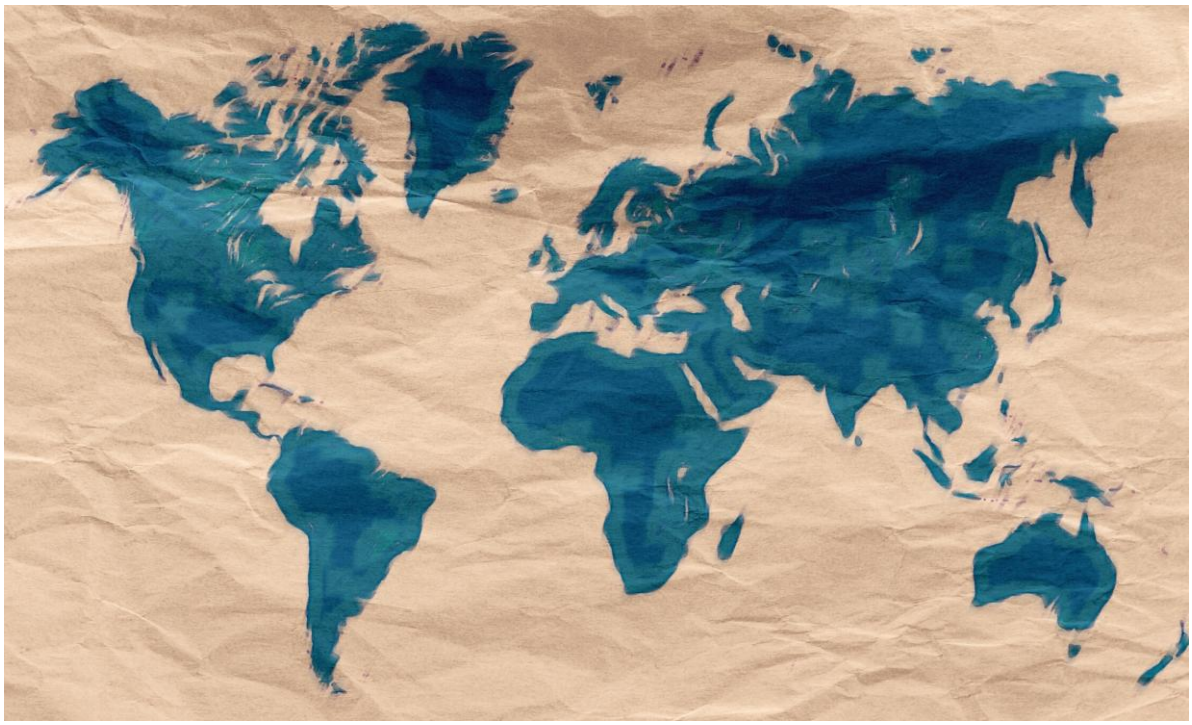
AMIStaDeS

Centro Studi AMIStaDeS APS, was founded in 2017 in Rome and is committed to the dissemination of international culture.

The center deals with research, dissemination and training on international issues, with a particular focus on geopolitics and international law.

It provides training courses for schools, students, professionals and companies; it carries out geopolitical analyses and reports; it organizes institutional events and conferences and informal meetings to approach the subjects covered.

At the time of this publication, more than 50 young professionals are part of AMIStaDeS, including board of directors and analysts. All animated by the same thirst for knowledge and sharing.



Scenari

Scenari is a line of reporting aimed at decision-makers of different kinds, such as companies, institutions, NGOs and other bodies operating nationally and internationally. The analysis of the present, combined with the awareness and knowledge of the past and the evolution of societies, relationships and phenomena, allows us to identify the most probable hypotheses of the context.

Scenari is a compass to guide decision-makers in the actions they decide to take. Scenari provides perspectives and visions using the multiple nuances borrowed from different fields such as social sciences, law and geopolitics. Scenari is a spectrum of possibilities from which decision-makers will be able to choose.



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Abstract

Migration flows, critical maritime infrastructure, and illicit activities are aspects that unfold within the complex system of the Red Sea, in a multifaceted and multi-level crisis.

The Red Sea, a vital crossroads for global trade and a stage for geopolitical tensions, emerges as a critical area for African, Middle Eastern, and European stability. The so-called "Red Sea Crisis," marked by Houthi attacks and competition over access to resources, highlights the need to anticipate global risks and to coordinate security and development policies.

This paper analyzes the strategic dynamics of the Horn of Africa and the Red Sea through a cross-sectoral collaboration between geographic and thematic Monitoring Units. The integrated approach combines vertical perspectives (the stances of individual countries) with horizontal ones (migration flows, organized crime, the maritime dimension).

From the geographic factors that determine geopolitics, through the dynamics analyzed according to the macro-themes mentioned above, the work progresses to the construction of future scenarios based on three competing hypotheses, differentiated by probability, that model macroeconomic, political, and military variables relevant for decision-makers.

Methodological approach

This work is the result of the collaboration between geographic Observatories, specifically Sub-Saharan Africa and the Sahel, and thematic Observatories: the Sea, the Migratory Flows and the Organized Crime. This cross-cutting collaboration highlights the internal determinants that explain the external manifestations of a highly strategic area like the Horn of Africa and the Red Sea. The cooperative approach between Observatories adds value to the research, as it combines a vertical perspective (dynamics and postures of individual countries) with a horizontal one (cross-sectional analysis by thematic areas), creating an integrated and multilevel framework.

The methodology adopted is that of Political, Economical, Social, Technological analysis (PEST), useful for breaking down the respective factors that influence countries' positions. The internal complexity of each country requires taking the official position of central governments as a reference, serving as a pivot for interpretation: from this, the main internal dynamics are inferred, which in turn shape external projections in the Red Sea geopolitical arena.

In addition to the PEST components, common points of intersection between geographical factors and thematic dynamics, the following were taken into consideration: internal and external pressure indicators, observable events capable of modifying the posture of external projection policies and their modalities and limits. Conversely, for the thematic analysis, maps of the areas and countries involved, lines of fracture and cooperation, structural determinants are addressed; and finally the main trends with probabilities and the elements necessary for building potential scenarios.

The construction of Scenarios is introduced by three competing hypotheses developed on the basis of macroeconomic, technological, political, and military information and trends, discussed and compared with macroeconomic and political indicators. The three scenarios are divided according to High, Medium-High, Medium-Low Probability. They represent models, therefore they are simplification, as they reflect some indicators and develop some variables, the most relevant for the problem addressed, as well as for the reader who uses them for decision-making purposes.

At this stage, the focus was chosen on the Horn of Africa, postponing the MENA component to a second edition of the publication Scenarios. Report for decision makers. The last update to this job was on January 30, 2026.

Context Analysis

by Lisa Borlotti, F. Adele Casale

Red Sea: crossroads of men, routes, interests and instability

Among the main *chokepoints* of the globe, the Red Sea represents one of the most sensitive theatres of global competition. Approximately 15% of the world trade crosses this sea, a share that makes the region one of the vital arteries of globalization. However, its importance is not only economic: it is geopolitical, humanitarian, and security-related. The tensions that cross (wars, trafficking, migration, cyber threats) directly impact on the stability of the Mediterranean, European energy supplies, and the incoming and outgoing flows of people and goods, which impact the stability of the African continent, the Middle Eastern countries, and the rest of the European area.

The area is both strategic and critical, due to instability, poverty, and internal inequalities that find their deep psychological, political and economic causes in the phenomenon of colonization[1], causes repeated over time, and which fuel a complex picture. Beginning in 2023, the term "Red Sea Crisis" emerged in the press, among strategic analysts, and within international bodies to describe the Houthi rebels' attacks on maritime trade in Yemen. This series of events should be interpreted within a multifaceted and multilevel system involving local, regional, and global aspects as the result of synchronic and diachronic dynamics, primarily around the issue of resource access.

Understanding the dynamics of the Red Sea means: **anticipate global risks** (energy, logistics, food, migration); **protect infrastructure and strategic routes**; **coordinate security and development policies**.

Therefore, the aim of this analysis is to navigate the issue of the Red Sea Crisis through its various facets, including African projections of power, migratory and economic-political dynamics, in a context of contention for access to resources in a broad sense, including, for example, mineral resources, social resources, economic resources, sea routes, military outposts.

[1] S. Kessi, F.Bean seed, B.S. Gekeler; Pan-Africanism and Psychology in Decolonial Times, Pan-African Psychologies, Palgrave Macmillan, Cham, 2021.

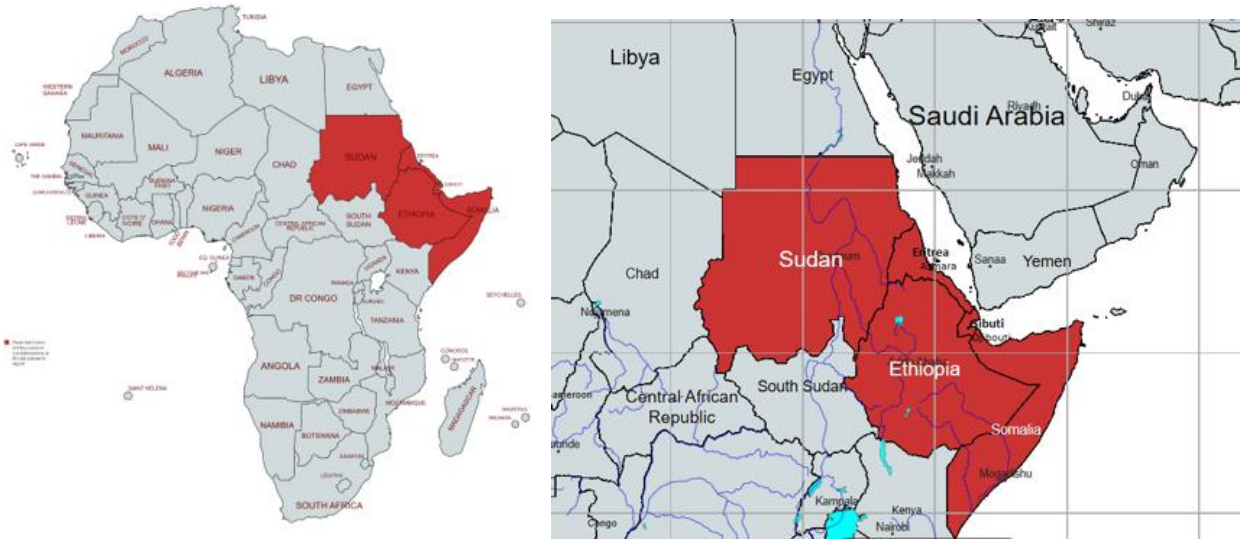


Image 1: Location of the covered countries in the Horn of Africa, and enlargement of the area. Map created by Andrea Speziale.

1. The Geopolitics of the Horn of Africa in the Red Sea

by F. Adele Casale

The Red Sea is a narrow strip of water that extends southeast from Suez, Egypt, for about 1,930 km to the Strait of Bab al-Mandeb, which connects it to the Gulf of Aden and the Arabian Sea, the gateway to the Indian Ocean. Characterised by high salinity (35- 41 ppt) and warm temperatures (21-34 C°), this sea divides the coasts of Egypt, Sudan, and Eritrea to the west from those of Saudi Arabia and Yemen to the east. Its maximum width is approximately 350 km, its maximum depth is approximately 3 km, and its surface area is 438,000 square kilometers.

An ancient strategic outpost, it has allowed the expansion of trade and commerce and the Arabic and Muslim sociopolitical exchanges through the founding of colonies in the coastal areas between Sudan and northern Somalia, since the 8th century.

The Horn of Africa is both a geographical space primarily encompassing the countries bordering the Red Sea, and a cultural region sharing many historical traits, including countries such as Sudan and Chad more broadly. Culturally, linguistically, and in terms of lifestyle, the populations of Somalia, northeastern Kenya, the Ogaden region of eastern Ethiopia, and southern Djibouti constitute a largely pretty homogeneous group.

For the purposes of this report, the Horn of Africa, including Sudan, is taken as the geographical basis. Concerning Somalia, the focus will be primarily on the northern portion corresponding to the Gulf of Aden and the state of Somaliland. The specific treatment of states is dictated both by analytical needs to address an extremely complex geopolitical arena, and to



Image 2: Geographic map of the Red Sea area on the Horn of Africa side, including the disputed areas (x) and the main geographical locations covered. Image by Andrea Speziale.

allow a specular analysis from the MENA point of view in the next edition next, as mentioned.

Historical, cultural, political, economic, social and technological elements contribute to the definition of the geopolitical region which sees various initiatives of collaboration, cooperation, mobile alliances, which, in turn, fit into a fundamental arena in the more global shift of the ***balance of power*** **towards Asia and the Indo-Pacific.**

The emerging axes: Somalia, Eritrea, Djibouti in an anti-Ethiopian key, on the one side, and Ethiopia supported by actorsextra-regional (such as the United Arab Emirates, Israel) on the other side.

1.1 Ethiopia

Ethiopia is a landlocked Parliamentary Federal Republic that aspires to regional *leadership* with a *Great Ethiopia* posture. Pushed by economic crises and internal conflicts, the Prime Minister Abyi Ahmed (since 2018) focuses on access to the sea to strengthen national cohesion and external projection.

MoU of January 2024 signed with Somaliland and the series of agreements on security and infrastructure with Djibouti, especially between 2024 and 2025, mark a strategic repositioning in the Horn of Africa, with the aim of diversifying maritime access under the pressure of an expanding industrial sector, according to the Grand Strategy of Two Waters announced in 2024.

In this regard, Israel's recognition of Somaliland on December 26, 2025, brings Israel closer to Ethiopia precisely at a time when the latter is embroiled in disputes with Egypt, Sudan, Somalia, and Eritrea over border issues, water security, and access to maritime outlets.

Capital: Addis Ababa.

Politics

(active diplomacy, cultural soft power, infrastructure cooperation).

- Domestic politics: process of Oromization > latent internal and border ethnic conflicts (Amhara, Tigray, Oromia, Ogaden);
- Corruption Index 37/100 (TransparencyInternational2024);
- Grand Strategy of Two Waters (Nile and Red Sea);
- Economic diplomacy aimed at new logistics and infrastructure corridors;
- Seeking energy and infrastructure partnerships with Gulf countries.

Through active diplomacy, soft power, and infrastructure cooperation, Ethiopia has the following main objectives:

- diversify access to the sea;
- consolidate regional leadership;
- reduce economic isolation.

Economy

- GDP per capita $1,011.1 (World Bank2022);
- Annual growth 7.3% (World Bank2024);
- Inflation 21% (WorldBank2024);
- Unemployment 3.4% (WorldBank2024);
- Poverty rate 38.6% (WorldBank2021);
- Gini index 31.1 (CIAFactbook2021);
- Foreign direct investment (FDI) $3.26 miliardi (Macrotrends2023).

Society

- Population: approximately 132.060 mln (WorldBank2024). Second most populous country on the African continent;
- Annual growth 2.6% (WorldBank2024);
- Average age: approximately 19 years (WorldPopulationReview2025);
- Ethnic groups: >80. Major groups (approx.): Oromo 35%, Amhara 17–27%, Somali and Tigray 6%, Sidama 4%, Gurage 2.5%, Welayta, Afar, Hadiya, and Gamo approx. 2%
- Migration 30.069 (WorldBank2024);
- Predominant religions (approx.): Christians 63%; Muslims 34%. (WorldPopulationReview2025);
- Urban population 24%, rural 76% (WorldPopulationReview2025);

Technology

(Following the Digital2025 strategy, the Digital2030 strategy was announced in October 2025).

- Renewable energy infrastructure (hydropower and wind power) > emerging regional hub;
- Renewed investment in digital technology across various sectors, including infrastructure, with the help of extraregional partners;
- Growing export-oriented industry.

Environment

- Tropical monsoon climate with specific topographic variations;
- Diverse terrain: desert areas in the east, tropical areas in the south, mountainous areas in the north;
- Vast chain of plateaus interrupted by the Rift Valley, which crosses the country from southwest to northeast;
- Mountain range surrounded by steppes and desert expanses;
- Main river: Blue Nile;
- Natural resources: minimal reserves of gold, platinum, copper, potassium, natural gas, hydroelectric power > gas reserves in the Ogaden Basin.

The environmental risk due, in a macro sense, to climate change is also significant in Ethiopia.
Recently (on November 25, 2025), the Hayli Gubbi volcano, in the Afar region on the border with Eritrea and Djibouti, erupted after approximately 12,000 years of inactivity.

In summary, the internal ethnic instability reduces Ethiopia's capacity for external projection, but it uses regional tensions to strengthen the central power political legitimacy, alongside selective cooperation. Ethiopia is close to the Gulf countries, China, Israel for their strategic investments. For these main reasons, on the one hand, the **increasing regionalization of the Ethiopian maritime strategy** may be a highly probable consequence, as well as assertiveness towards Somalia, or rather, Somaliland, and Eritrea. On the other hand, the **internal fragility** represents a force in the opposite direction.

1.2 Eritrea

De facto authoritarian regime. With independence from Ethiopia in 1993, it took control of the main ports of Massawa and Assab to the latter, thus assuming a strategic role in the Horn of Africa. Despite the 2018 peace agreements that put an end to the twenty-year conflict in Tigrai, and the consequent normalization of relations with Addis Ababa (allies in Tigray) the tensions between the two countries, which periodically escalate, remain a point of concern for monitoring tensions around Eritrean ports.

With reference to two significant border areas next to each other, Eritrea maintains troops in Tigray, and appears to support the Amhara cause in Ethiopia bordering Sudan. US sanctions (2021) due to the conflict are impacting on economic stagnation, poverty, political repression, emigration, and international isolation.

Capital: Asmara

Main ports: Massawa to the north, the main commercial and military port.

Assab to the south, with a logistics and energy vocation.

Politics

(Strengthening and diversification of the anti-Ethiopian diplomatic network to achieve strategic autonomy).

- A highly militarized, centralized, and repressive domestic system;
- Corruption Index 13/100 (TransparencyInternational2024);
- Exploitation of its maritime position to attract investments and military partnerships with Gulf and North African countries;
- Active diplomacy to mediate conflicts and position itself as a regional stabilizer.

Internal militarization and the lack of political openness prompt President Isaias Afwerki (in office since 1993) to use diplomacy as a tool for external legitimization.

Economy

(agriculture and mining)

- GDP per capita $688.7 (World Bank2011);
- Annual growth 3% (AfricanDevelopmentBankGroup2023);
- Inflation 7.4% (CiaFactbook2024);
- Unemployment 5.6% (WorldBank2024);
- High vulnerability to debt > debt trap;
- Significant regional and economic inequality;
- Foreign direct investment (FDI) $2.07mln (Macrotrends2023);

The weak economy and the climate risk restrict investment capacity, and drives the search for strategic partners, towards the Gulf countries and China

Society

- Population: approximately 3.535 million (WorldBank2024);
- Annual growth rate 1.9% (WorldBank2024);
- Average age: approximately 19 years (Worldometers2025);
- Net migration -12.696 (WorldBank2024);
- Balanced ethnic composition (Tigrinya 55%, Tigre 30%, minorities including Saho, Hedareb, Afar, Bilen, and Rashaida, Kumana, Narama, all approximately 2%, an aspect of vulnerability to conflict;
- Predominant religions: Islam 49%, Christianity 49%, traditional beliefs 2%;
- Population concentrated in the northern coastal area, urban 44%, rural 55% (WorldPopulationReview2025).

Technology

(infrastructural and selective weaknesses)

- Geothermal energy;
- Hydrocarbons.

Environment

(increasing environmental risk due to climate change).

- Hot, arid climate along the coasts; temperate in the mountainous region; semi-arid in the western hilly areas;
- Water scarcity;
- Disputed desert coastlines;
- Natural resources: gold, potassium, zinc, copper, salt, possibly oil, natural gas, and fisheries.

1.3 Djibouti

A small state in the Horn of Africa located in a highly strategic position on the Strait of Bab al-Mandeb, a junction between the Red Sea and the Gulf of Aden. The country thrives on port trade and foreign military bases, which make it a *hub* for maritime security, and economic relations mainly with Ethiopia and China.

Politically stable, but fragile due to external dependence and border tensions, its President Ismail Omar Guelleh (since 1999) maintains the balance of global powers He has assumed the role of regional mediator, and is interested in diversifying international relations. He is also behind attempts at reconciliation between Ethiopia and Somalia in 2024 following the signing of the MoU (see Ethiopia). Furthermore, he promoted the port sharing agreements for Tadjoura, in Addis Ababa, in 2024.

The goal is to preserve its security, especially in anti-terrorism terms, and its logistical centrality through the control of maritime routes

Porti principali: Djibouti; Doraleh.

Capitale: Djibouti(Djibouti).

Politics

- Domestically, authoritarian centralization under Guelleh;
- Stability achieved through co-optation and patronage among the elites;
- Corruption Index 31/100 (TransparencyInternational2024);
- Discontent and inequality;
- Foreign affairs attitude: a pragmatic, defensive foreign policy;
- Active multilateral diplomacy focused on mediation;
- Granting of military bases and infrastructure.

Although Djibouti is considered a stable country, the discontent - due primarily to internal socioeconomic inequalities - is a source of monitoring and control by the central government, which also fears possible resurgence of ethnically based conflicts. Djibouti's armed forces are largely focused on countering terrorism in border, coastal, and inland areas.
Competing with Ethiopia and Somalia for access to the sea, as illustrated in the section on *Maritime Routes and Infrastructure* in this paper, Djibouti relies heavily on the flow of trade and energy transits passing through Bab al-Mandeb. Any crisis, such as wars in Yemen, attacks in the Red Sea, increases in insurance premiums, or rerouting of shipping lanes toward the Cape of
Good Hope, reduces traffic in its ports, affecting customs revenue and foreign investment.

Economy

(90% dependent on food imports WFP2025).

- GDP per capita $3,496.5 (World Bank 2024);
- GDP composition (CIA Factbook2024) agriculture 2.6%, industry 15.4%, services 75.5%;
- Annual economic growth 6% (WorldBank2024);
- Inflation 2.1% (WorldBank2024);
- Unemployment 30%(WorldBank2024);
- Poverty rate 79%, of which 42% is extreme poverty;
- Gini Index 41.6 (CiaFactbook2017);
- Post-COVID-19 pandemic resilience;
- Foreign direct investment (FDI) $137.01 million (Macrotrends2023).

According to its Vision2035 plan and the National Development Plan 2020-2024, Djibouti aims to strengthen its internal cohesion to enhance its regional influence by building on a diversified and competitive economy, with the private sector as the main driver.

There is a selective opening to Chinese and Arab capital, with care taken not to compromise the economic sovereignty. Investments are focused on the modernization of logistics and digital infrastructure, sometimes linked to foreign debt.

Society

(discontent over internal inequalities and ethnic-based conflicts).

- Population: approx. 1.2 million (WorldBank2024);
- Annual growth 1.4% (WorldBank2024);
- Average age: approximately 25 years (WorldPopulationReview2025);
- Ethnic groups: Somalis 60%, Afars 35% are the largest groups (CiaFactbook2024);
- Migration -11% (WorldBank2024);
- Predominant religions (approx.): Islam 94% (WorldPopulationReview2025);
- Urban population 79%, rural 21% (Macrotrends2023).

Technology

Goal: to make Djibouti "the beacon of the Red Sea".

- Investments in technological innovation in telecommunications;
- Investments in technological innovation in logistics;
- Infrastructure investments (water, energy, sanitation, telecommunications);
- Small-scale solar and wind projects, signs of an energy transition aimed at reducing dependence on imports;
- Investments at debt trap risk.

Environment

- Desert climate, hot and arid;
- High seismic risk;
- Natural resources: geothermal energy potential, gold, clay, granite, limestone, marble, salt, diatomite, gypsum, pumice, oil.

1.4 Somalia

A coastal country for much of its length, it overlooks the Red Sea and the Arabian Sea. Despite its inaccessible and underdeveloped coastline, Somalia remains a key strategic outpost, especially for regional maritime security. The population, very young and largely Muslim, lives in a context marked by poverty and political instability fueled by fragmentation and clan-based conflicts. **Even if they are not the direct causes of the internal conflicts**, they fuel for it, alongside federalism, favoring divergent regional policies (Somaliland, Puntland, Jubaland.), to the detriment of national unity strongly desired and promoted by the central government, as reiterated in the National Transformation Plan 2024-2029. However, the unity has been recently further destabilized by Israel's official recognition of Somaliland on December 26, 2026[2], strongly condemned by the President Hassan Sheikh Mohamud (dal 2022).

The economy depends mainly on agriculture, pastoralism and remittances from the diaspora. The threat of al-Shabaab (especially in the central and southern areas), and 2024 MoU between Ethiopia and Somaliland accentuates the sense of encirclement and pushes Mogadishu towards new anti-Ethiopian regional alliances.

Main ports for access to the Red Sea: Zeila, Berbera, Bosaso.

Capital: Muqdisho (Mogadishu).

[2] This move by Israel carries with it the potential for destabilization in the region, both because it undermines the national unity so strongly defended by the current government, and because it becomes a competing player with those, like Ethiopia, who need to diversify their access to the sea, as well as setting a precedent for recognition by other states.

Politics

- Domestically, the central government promotes unity, stability, and territorial control;
- Institutional fragility, ethnically based conflicts, and the presence of armed and terrorist groups;
- Corruption Index 9/100 (TransparencyInternational2024);
- Foreign policy aimed at reaffirming its sovereignty over coastal regions;
- Strengthening cooperation with other regional actors in an anti-Ethiopian context (Ogaden border dispute).

Somalia tends to pursue multilateral diplomacy, participating in regional forums and forging regional and extra-regional alliances primarily focused on security. In fact, the objectives are:

- to preserve territorial integrity;
- to counter Ethiopian expansion;
- to consolidate international legitimacy, where humanitarian aid and international missions have a broad scope of action.

Economy

(predominantly agriculture and livestock farming; dependence on aid and remittances).

- GDP per capita $637 (WorldBank2024);
- GDP composition: agriculture and pastoralism 60%; fishing is significant, but data not available; services and remittances ($6.23 billion according to the Federal Republic of Somalia 2024);
- Annual growth 4% (WorldBank2024);
- Inflation 6.8% (CiaFactbook2022);
- Unemployment 19% (WorldBank2024);
- Poverty rate 54.4% (CiaFactbook2022);
- Gini index 37 (WorldBank2022);
- Foreign direct investment (FDI) $676 million (Federal Republic of Somalia 2023).

Society

(clan-based society; high internal mobility, seasonal pastoral migration, and external mobility)

- Population 19,009,151 million (WorldBank2024);
- Annual growth rate 3.5% (WorldBank2024); high infant mortality rate 65/1000 (Worldmeters2025);
- Average age approximately 15 years;
- Ethnic Groups: 4 predominant groups divided into sub-clans and further subdivided into Hawiye, Darood, Rahanweyn, and Dir;
- Migration 26.859;
- Predominant religions (approx.): Islam 99.9%;
- Urban population: 48%, rural population: 53% (Worldmeters2025).

Technology

(focus on digital telecommunications, but offshore reserves remain largely untapped).

- Lack of logistics and digital infrastructure;
- Modernization of the telecommunications network infrastructure to make it efficient and accessible;
- Ongoing development of e-commerce driven by increased access to online banking services;
- World Bank's ICT Sector Support Program (Phase 2);
- European Union's AfricaConnect 2 program;
- Small-scale solar and wind projects, signs of an energy transition aimed at reducing dependence on imports.

Environment

(high climate risk that also affects seasonal internal migration flows).

- A semi-arid territory that is predominantly flat in the south and mountainous in the north;
- A largely inhospitable coastline, rugged in the north and lined with sand dunes in the south;
- A primarily desert climate. Monsoon climate in the northeast (between December and February) and in the southwest (between May and October); temperate in the north; hot in the south;
- Major rivers around which agricultural activity is centered: the Giba and Uebi Shabelli;
- Natural resources: uranium and iron ore reserves (largely unexploited), tin, gypsum, bauxite, copper, salt, natural gas, and probable oil reserves.

1.5 Sudan

The eastern border overlooking the Red Sea makes Sudan a geostrategic hub for both international trade and illicit trafficking (see *Illicit Trafficking Routes*).

With increasing internal unrest and violence, since April 2023 it has been the scene of a civil war between the two main actors: the Sudan Armed Forces (SAF) led by Commander-in-Chief Abdel Fattah Abdelrahman Burhan and the Rapid Support Forces (RSF) led by General Mohamed Hamdan Dagalo (Hemedti). The civil war sees a further militarization of society (see *Illicit Trafficking Routes*) and the further escalation of ethnically motivated violence, mass displacement, and economic collapse. The clan-based militias and control over resources (oil, gold, minerals) make the conflict a complex reality characterized by political, economic, and identity-based dynamics.

The impact of the crisis is regional (involving Chad, South Sudan, Ethiopia, Egypt) and is felt most acutely in the most fragile areas, namely Darfur and South Kordofan. At the same time, the context attracts external actors interested in gaining control of the Red Sea coastline.

Main ports: Port Sudan.

Capital: Khartoum.

Politics

(fragmentation of power among the SAF, RSF, and local militias; competition for legitimacy; diplomatic and military relations with regional and global actors).

- Traditionally a dual strategy: exploiting the maritime front for trade and exports (Port Sudan) and using the coast as geopolitical leverage to attract external partners;
- Since the war, the focus has shifted to territorial control of the coast, driven by military needs and the need to attract external alliances (naval and logistical);
- Corruption Index 15/100 (TransparencyInternational2024);
- Both factions are conducting rival diplomatic missions to secure regional and international support and legitimacy;
- Exploitation of resources and war economies: trade in gold and minerals as a source of funding for militias and the informal economy.

Militarization of the coast, competitive negotiations with external actors, use of economic concessions to gain support, with the objectives of:

- secure resources to finance the fronts;
- get international/regional support;
- preserve seaways and infrastructure.

Important limitations identified include the loss of central control, economic collapse, and a serious humanitarian crisis, which reduce governance capacity and attractiveness for mainstream investment. The dependence of the SAF and the RSF on resources and weapons drives each faction to seek external support from neighbouring countries. Gulf countries, Türkiye, Russia which offer logistical and/or military support, resulting in opportunistic investments by external actors to further their interests of strategic influence on the coast. The humanitarian crisis causes displacement flows (*see Survival Routes: Migrations in the Horn of Africa and the Red Sea*) and requests for help that lead to mediation missions and ceasefire pressure by the UN, EU and regional countries.

Economy

(collapse due to the ongoing civil war, war economy).

- GDP per capita $989.3 (WorldBank2024);
- Annual growth -13.5% (WorldBank2024);
- Hyperinflation;
- Unemployment 11.45% (CiaFactbook2023);
- Poverty rate 71% (WorldBank2024).

The economic collapse paralyze all productive sectors, with repercussions primarily on food security, and promotes illicit trafficking(see *Illicit Trafficking Routes*). Furthermore, although investors are trying to mitigate the effects of international sanctions. These persist and are expected to evolve under the new US Presidency (2024). In this regard, mention is made of the will emerged for a peace plan, already brought to the UN Security Council (between December 2025 and January 2026).

The historical cross-border trade (Chad, South Sudan, Libya and Egypt, Eritrea, Ethiopia), both formal and informal, resists at the civil war and riots, despite the security implications, and since the beginning of the conflict many large companies have located towards Port Sudan, which remains an important and lively hub of exchange between inside and outside.

Society

(Ethnic-based militias in peripheral areas have played an important role in civil conflicts since the post-colonial period).

- Population 50,448,963 mln (WorldBank2024);
- Annual growth rate 0.8 (WorldBank2024);
- Average age approximately 18.5 (Worldmeters2025);
- Ethnic Groups <500 including Arabs 70%; Fur, Beja, Nuba, Ingessana, Uduk, Fallata, Masalit, Dajo, Gimir, Tunjur, Berti (CiaFactbook2024);
- Migration -544,257 (WorldBank2024);
- Main religions: Muslim majority, Christian minority;
- Urban population 35%, rural 65% (Worldmeters2025) and is concentrated in the southeast between the Blue Nile and the White Nile, and in southern Darfur).

Technology

- Disputed port infrastructures;
- Damage to infrastructure and fuel shortages have reduced what remains of industrial productivity in the cities of Khartoum, Bahri and Omdurman, where most of the factories are located;
- Major export sectors crippled, causing a significant decline in FDI.

Environment

- Hot and arid climate, rainfall varies depending on the region between April and November;
- Mostly flat, desert territory to the north;
- Natural resources: oil; small reserves of iron, copper, chromium, zinc, tungsten, mica, silver, gold; hydroelectric power;
- Main Nile River, fed by the Blue Nile and White Nile. The Nile flows northward through Egypt.

1.6 Regional Organizations

Finally, a brief overview of of the **major regional organizations**, often supported by the African Union (AU) to implement the Agenda2063, and with which countries interact. Within these organizations, they meet, clash and form alliances even with extra-regional partners (for example, on December 12th, news broke Eritrea has withdrawn from IGAD following escalating tensions with Ethiopia). As specifically mentioned in the section *Illicit Trafficking Routes* of this paper, these routes are intertwined with programs and projects. Among the most relevant and significant:

- The Eastern African Community (EAC) aims to strengthen economic, political, social and cultural integration in order to improve the quality of life of the populations of East Africa; its members include, for the countries covered in this work, Somalia and Ethiopia.
- The Intergovernmental Authority on Development (IGAD). Promotes joint and coordinated development strategies within the framework of macroeconomic policies across various productive sectors, as well as in the social, technological, scientific, infrastructural, commercial, and sustainable development sectors. It aims to create a free trade area, and an exchange and solidarity hub to handle environmental risks.
- The Horn of Africa Initiative, which for the purposes of this work includes Djibouti, Eritrea, Ethiopia, Somalia, and Sudan. The initiative defines the priorities of regional programs in the areas of infrastructure connectivity, economic integration, strengthening resilience, and human capital.

1.7 Scenarios

Scenario 1 – High probability	**Ethiopia.** In the medium and long term, Ethiopia is succeeding in diversifying its access to the sea, reducing its dependence on Djibouti and seeing positive effects on trade, resulting in a regionalization of its foreign policy. Domestically, it maintains a firm stance to contain both the consequences of the civil war in Sudan and the latent conflicts along disputed areas with its neighbors. These domestic situations contribute to pushing its foreign policy focus increasingly eastward. It remains a country attracting foreign investment that goes its own way, despite continuing to participate in regional initiatives through projects and programs that demonstrate leadership in the region. **Eritrea.** Driven by its internal militarized stance, the effects of climate change, and external pressure from Ethiopia, there has been a steady increase in regional diplomacy as the foundation of foreign policy, with consequent greater participation in an anti-Ethiopian coalition alongside Somalia and collaboration on regional projects and programs. This is despite its recent withdrawal from IGAD. Relations with Ethiopia (as well as those with Djibouti) continue to unfold amid competition and deterrence over access to the sea and the management of the conflict zone in Tigray. Despite environmental risks, **Djibouti** maintains and strengthens its logistical-military role, which is exploited by both continental and global actors, contributing to intensified regional competition for access to ports, with Ethiopia also at the forefront. Economic pressures linked to internal inequalities, debt, and dependence on external actors are pushing the country toward agreements further and further east. Despite chronic economic and political vulnerability, Djibouti continues to exploit regional rivalries without taking sides and to play an active role in this regard within regional organizations. **Somalia.** Domestically, the central government manages to cope with separatist pressures and the terrorist threat with the constant and chronic assistance of international missions, at least in the short term, even though it struggles to maintain control over the territory. The status quo of economic, political, social, and environmental vulnerability perpetuates Somalia's role as a strategic security hub on the one hand, and as an active player within regional organizations and initiatives on the other hand. Relations between Somalia and Ethiopia are becoming strained, leading to the consolidation of an anti-Ethiopian bloc on a regional scale. **Sudan**. Internally, the economic collapse is becoming chronic, and humanitarian conditions are deteriorating. External efforts to contain the conflict within Sudanese territory are fueling an escalation of competition for access to resources and of violence, especially in peripheral and more fragile areas. There is an increase in opportunistic extra-regional interventions aimed at controlling the coastline. Regional organizations are internally divided over which parties to engage with, driven by extra-regional interests.

Scenario 2 – Medium-low probability	**Ethiopia:** Trade diversification remains inconsistent, depending primarily on relations with Somalia, which are reflected in the implementation of the MoU with Somaliland, following Israel's recognition of Somaliland, although participation in regional programs and initiatives continues. The conflicts in disputed areas and along the border with Sudan remain at a standstill, resulting in areas of low-intensity conflict. The push eastward is slowing. **Eritrea:** Maintenance of the status quo. Economic isolation and sanctions persist, and the management of major ports has been outsourced in an effort to attract foreign investment. Internally, the country remains vulnerable to the impact of environmental risks, heavily militarized, and controlled by the central government; externally, it maintains a presence throughout its territory, including in areas bordering Ethiopia and in Tigray, and continues to participate in regional initiatives to stem its isolation. **Djibouti.** The erosion of port revenues due to regional instability and the lack of diversification of revenue streams is pushing Djibouti toward new trade agreements, especially with extra-regional actors, to preserve its role as a crucial hub. Its stance within regional organizations remains that of a (seemingly) neutral mediator. **Somalia.** A slowdown in the fight against terrorism and a loss of control by the central government, which is forced to delegate more authority to member states on purely local issues. Gradually, Somalia manages to break free from external humanitarian interventions and build its independence and identity as a regional actor in the Red Sea region, thanks in part to its involvement in regional organizations, attracting foreign investment for infrastructure suited to environmental risks. **Sudan.** In the long term, the Sudanese conflicts do not become chronic. With extraregional aid and the support of regional organizations, the SAF faction manages to take control, with the hope of continuing the original plan for a transitional military government, but power is not returned to civilians. Externally, Port Sudan gains increasing importance for both formal and informal activities, attracting ever-greater investment.

Scenario 3 – Very low probability	**Ethiopia.** Ethiopia is forced to scale back its foreign policy ambitions due to the loss of control over areas bordering Sudan and the escalation of conflicts in disputed territories. The country's isolation is also increasing within regional organizations; the economy is contracting; and domestic policies are becoming even more rigid, leading to a surge in domestic discontent and the escalation of latent conflicts along the entire border. **Eritrea:** The central government loses total control of the territory, leading to an explosion of internal discontent, the escalation of the latent conflict in Tigray, and a coup by the military in alliance with non-state actors whom they have armed. In the long term, this leads to the outbreak of a civil war, total loss of control over ports and climate risk management, and isolation within regional organizations. **Djibouti:** Loss of control and power by the elites, due both to public discontent and to the worsening of internal disputes. Due to the emergence of severe instability, both in Djibouti and in the region, extra-regional actors are driven to shift their attention elsewhere, resulting in a decline in the strategic importance of the Red Sea route. Djibouti loses its status as a mediator within regional organizations. **Somalia.** Explicit international recognition of Somaliland, which would set a precedent for other separatist movements. Dissolution of the federation and escalation of ethnically based conflicts over resources. Consequently, the deployment of humanitarian aid, military missions, and exploitation of the country by extra-regional actors who rely on isolated elites competing both on the ground and within regional organizations. **Sudan.** The conflict becomes chronic, leading to a deterioration of the direct and indirect effects on the entire Red Sea region, which loses its status as a crucial transit route. This new situation deters foreign investment but attracts humanitarian interventions from both extra-regional and regional actors, with a focus on stability in the Sahel rather than the balance of power in transit toward Asia and the Indo-Pacific.

In the following sections, the complexity of the Red Seas geopolitical region is analyzed through thematic "lenses" and cross-cutting analyses related to the issues of **migration flows**, **maritime infrastructure**, and ongoing **illicit activities**

2. Survival Routes: Migrations in the Horn of Africa and the Red Sea

by Danilo Trippetta

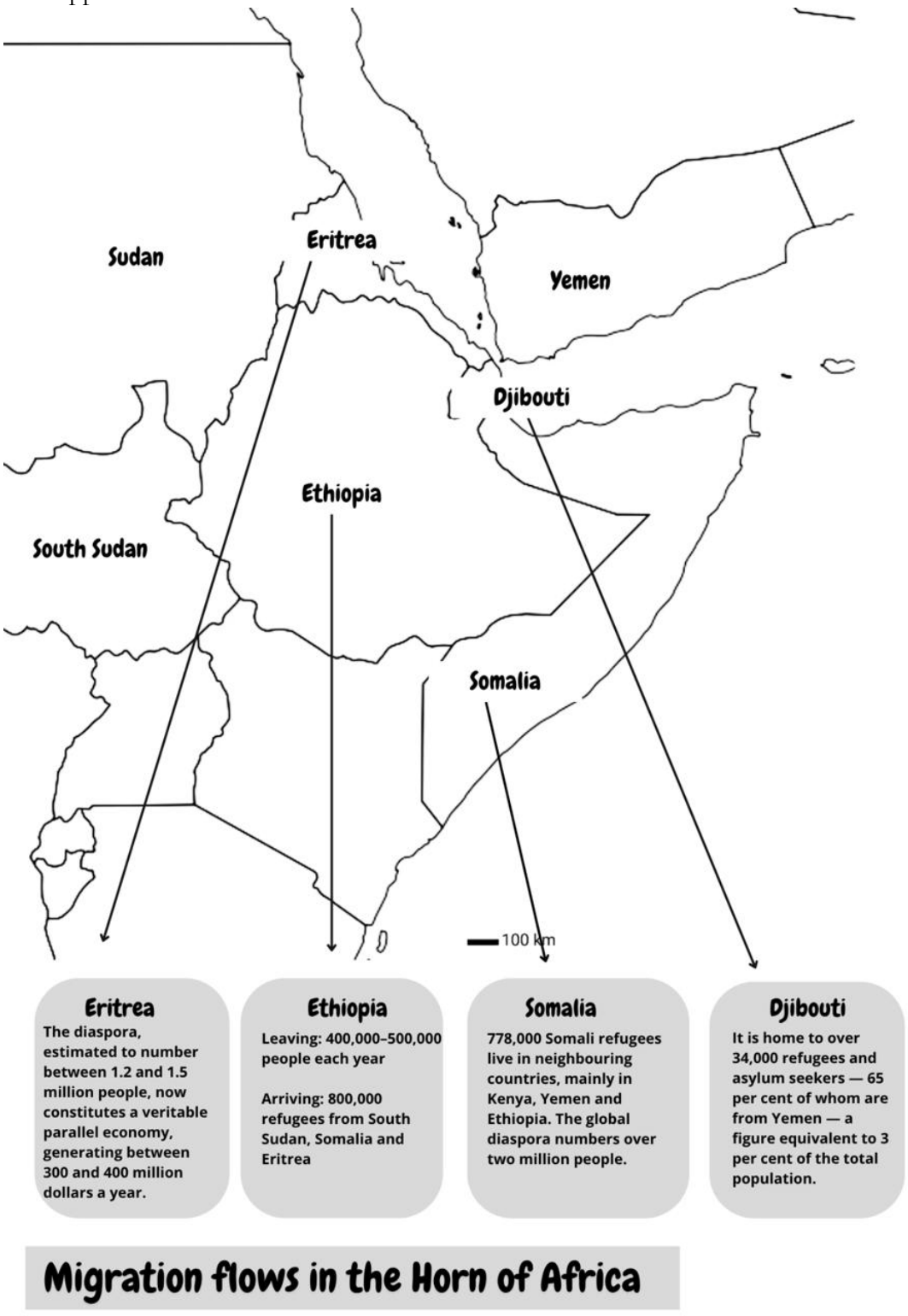


Image 3: Map: Migration Flow Numbers in the Horn of Africa, produced by the author.

2.1 The Eastern Route: The Bridge to the Arabian Peninsula

The most significant migration route in the Red Sea continues to be the one that crosses the Bab al-Mandeb Strait, connecting the Horn of Africa to the Arabian Peninsula. International Organization for Migration (IOM) data for 2024 reveal a dramatically evolving picture: **approximately 446,194 movements have been documented from the Horn of Africa to the Arabian Peninsula**, marking a 13% increase over the previous year.

This increase cannot be read simply as a consequence of the worsening of social and economic conditions in the countries of origin. Rather, it represents the emergence of new regional geopolitical dynamics that make migration an involuntary instrument of diplomatic pressure and destabilization. **Ethiopia** maintains its dominant position among the countries of origin, contributing approximately to **90% of the flows**, but the demographic mix of migrants is changing, increasingly including skilled professionals and urban youths, in addition to the traditional categories of rural refugees.

The journey through Yemen is confirmed as one of the most dangerous in the world. In 2024, **over 550 migrants died while trying to cross the Red Sea**, a figure that likely underestimates the true extent of the ongoing humanitarian tragedy. The persistence of these flows despite the risks highlights how pressure in countries of origin has reached such levels that even the risk of death is acceptable in attempting the crossing. Saudi Arabia remains the primary destination for these movements, but the Kingdom's migration policies have significantly become more severe. Hundreds of people were killed by Saudi authorities on the Saudi-Yemeni border between March 2022 and June 2023, configuring a violent deterrence strategy that, however, fails to completely discourage the flows.

2.2 The Western Route: Towards the Mediterranean and Europe

Alongside the eastern route, a migratory corridor is developing from the Horn of Africa to the Mediterranean, crossing complex and unstable territories such as Sudan and Libya. This route, traditionally considered secondary, has nevertheless acquired growing strategic importance in recent years. This importance is linked not only to the increase in flows, but also to diplomatic pressure exerted by European countries to externalize the border control and limit departures to Europe.

According to the data from the International Organization for Migration (IOM), **In 2024, over 181,000 people attempted to cross the central Mediterranean, including approximately 70,000 from eastern sub-Saharan African countries such as Eritrea, Somalia, Ethiopia and Sudan.** The route that passes through Sudan, crosses the Sahara Desert, and reaches Libya is now one of the main land

routes for irregular migration. The crossings take place under extreme conditions, often aboard overloaded trucks headed for transit centers located in Kufra, Sebha, and Bani Walid, which are crucial hubs in the Libyan migration network.

Before the outbreak of internal conflict in April 2023, Sudan played a central role as a transit and sorting country. Its strategic geographic position, at the crossroads between the Horn of Africa, the Sahel and the Middle East, made it a natural hub for the movement of people, goods, and capital. Thousands of migrants from Eritrea, Ethiopia, and Somalia crossed Sudan's eastern border and headed north through the country and on to Libya. In 2022, before the crisis, the IOM estimated that over 500,000 migrants were on Sudanese territory, many of them waiting for opportunities to continue on to the Mediterranean.

However, the outbreak of the conflict between the SAF and the RSF has radically transformed this fragile balance. In just a few months, Sudan went from being a transit country to the primary source of refugees in the entire region. Between April 2023 and September 2024, the United Nations recorded over **7.1 million internally displaced persons and more than 1.8 million refugees had fled to neighbouring countries, notably Egypt (about 480,000 people), Chad (about 580,000), South Sudan (over 600,000) and Ethiopia (more than 150,000).**

This new reality has triggered a domino effect: the closure of some traditional land routes and the emergence of new, longer and more dangerous routes through the Sahara Desert and southern Libya. The areas of Kufra and Sabha, once commercial hubs, have now become transit zones dominated by criminal networks that manage human trafficking, as analyzed in the chapter *Illicit Trafficking Routes*. The violence, kidnappings and abuses suffered by migrants are documented by numerous reports by UNHCR and Human Rights Watch, which estimate that approximately **60% of migrants crossing Libya are exposed to forms of exploitation or arbitrary detention**.

From Libya, the flows are mainly directed towards the coasts of Zawiya, Sabratha and Al Khoms, from where boats depart for Europe. The main destinations remain Italy and Malta, with **Italy, which in 2024 recorded over 155,000 arrivals by sea, of which almost 40,000 came from the central-western route.** However, some more recent flows have shown deviations towards Tunisia and Algeria, where tighter controls have prompted some migrants to attempt the crossing directly from the Tunisian coast to Lampedusa or from the Algerian coast to Sardinia and the Balearic Islands.

In this scenario, the Western route represents not only a path of escape and hope, but also a symbol of the contradictions of international migration governance. Containment policies, bilateral agreements, and economic support for transit countries, such as those between the European Union, Libya, and Tunisia, have

shifted the problem further south, without reducing migratory pressure. On the contrary, they have made the journeys longer, more expensive, and more dangerous, fueling a veritable "**geography of risk**" that affects millions of people and redefines migration routes between Africa and Europe.

Country	Main critical issues	Most relevant data	Inflow (origin)	Outflow (destination)
Ethiopia	• Dual exposure to migration (country of origin and host country) • Employment crisis and demographic pressure • Interethnic tensions in refugee camps • Institutional fragility and regional disparities • Impact of the war in Tigray • Increasing climate vulnerability	• 126 million inhabitants (2024) • 880,000 refugees present • Only 12% of adult refugees obtain a work permit • 2.1 million internally displaced persons • 70% under 30 • 2 million new workers/year for only 400,000 available positions	• South Sudan • Somalia • Eritrea	• 400,000 - 500,000 annual departures • 230,000 - 280,000 to Saudi Arabia, the United Arab Emirates, and Qatar • 45,000 - 60,000 to Europe via Sudan - Libya • 15,000 skilled workers to the United States, Canada, Nordic countries
Eritrea	• Indefinite and coercive military service • Political repression and lack of civil liberties • Systemic exodus of the population • Mandatory taxation of the diaspora • Refusal to cooperate with UNHCR and IOM	• 4,000 - 5,000 people fleeing each month • Diaspora: 1.2–1.5 million • 2% tax on foreign income: 300 - 400 million USD/year	• Ethiopia • Sudan (overcrowded camps)	• Europe (via Libya, Mediterranean route) • 13% of arrivals in Italy by sea in 2023

Somalia	• Political and institutional fragmentation • Presence of Al-Shabaab (20% of the territory) • Severe climate vulnerability • Biometric systems and incomplete data • Areas inaccessible for security reasons	• 778,000 refugees abroad • Diaspora >2 million • 3.8 million internally displaced persons • Floods 2023 - 24: 2 million people affected • Drought 2020 - 23: 43,000 deaths	• Kenya • Ethiopia • Yemen	• 40,000 - 50,000 to Gulf countries • Flows towards Europe via land and sea routes
Djibouti	• High climate vulnerability • Economic dependence on foreign military bases • Structural water scarcity • Tensions between local communities and refugees	• 34,000 refugees (3% of population) • 100,000 - 130,000 migrants in transit/year • Precipitation <150 mm/year • 60% drinking water comes from desalination	• Yemen (65% refugees) • Ethiopian migrants in transit towards the Arabian Peninsula	• Very low outflows • Main role: Transit country to Yemen - Gulf

Sources: see bibliography

2.3 Tensions and cooperation strategies in the Horn of Africa

Migration flows across the Red Sea and the Horn of Africa are the visible result of multiple fault lines that affect the region from a political, social, generational, and environmental perspective. **At the root of migration lie complex and interconnected causes: chronic instability in states, armed conflicts, political repression and the growing pressure of climate change**.

In Ethiopia, internal inequalities, ethnic conflicts (especially in the Tigrai, Oromia, Ogaden regions) and growing discontent with the central government's policies, both domestic and foreign, with which the population does not share its priorities, the Sudanese conflict, with over 11 million internally displaced persons caused from the intensification of urban and rural clashes along clan lines and the collapse of services, and the Eritrean dictatorship, built on heavy militarization reinforced by a "**besieged**

fortress" narrative useful for maintaining internal cohesion and that drives thousands of young people to flee indefinite military service are the most obvious manifestations of a region where instability has become the norm. However, this is not merely a matter of wars or governance crises: migration in the Horn of Africa is also the result of a generational shift.

Given the average age of the population of the countries under consideration, **young people now make up the majority of migrants today**: over 65% are under thirty, and in many cases, mobility is no longer merely a reaction to poverty, but an attempt of planning a different future. The lack of economic prospects, social exclusion, and mass unemployment make migration an almost natural response to a system that fails to offer opportunities for fulfillment.

At the same time, the increasing **climate pressure** is reshaping the socioeconomic balance of entire communities. Rural regions of Somalia, southeastern Ethiopia, and Sudan, affected by alternating cycles of extreme drought and flash floods, are witnessing the collapse of agricultural systems based on resources that are now insufficient. This context fuels massive internal migration to coastal cities or neighboring countries, where, however, economic opportunities remain limited and competition for scarce resources can lead to new outbreaks of conflict. Climate change therefore acts as a multiplier of instability, accelerating processes of impoverishment and unplanned mobility.

Another factor of transformation is represented by the growing **overlap between migration routes and economic routes**, especially in the informal sector. Many young people leaving Eritrea, Ethiopia, or Somalia do not simply follow traditional routes to the Gulf or the Mediterranean, but instead move through local trade networks that connect markets, ports, and transit zones. In some cases, migrants become part of the same informal economy that carries them: they work temporarily on construction sites, ports, or illegal trading zones to finance the next stages of their journey. This makes the geography of migration more fluid and less predictable, but at the same time reinforces the dependence of human movements on regional economic dynamics and fluctuations in cross-border trade.

The growing **militarization of borders**, particularly along the Yemen-Saudi Arabia axis, has added a further layer of risk. Testimonies and investigations gathered by international organizations show that armed repression, while aimed at curbing migration flows, has failed to stop mobility, but has instead contributed to making the routes more violent and clandestine. This confirms that deterrent policies, if not accompanied by legal alternatives and a strengthening of socioeconomic conditions in countries of origin, increase the vulnerability of migrants without producing lasting effects on the management of flows.

In this scenario, the fault lines are multiplying: between states and populations, between young

people and institutions, between those who stay and those who leave. However, **alongside these conflicts, opportunities for cooperation are also emerging, often promoted by international actors**. The European Union, through bilateral partnerships or platforms for political cooperation, attempts to manage flows by outsourcing border control; the AU, on the other hand, promotes initiatives for regular mobility and the protection of migrants. These forms of cooperation, while necessary, remain fragmented and marked by power imbalances: the security interests of European countries often prevail over the humanitarian or development interests of countries of origin. While trade or service exchange agreements follow a logic of economic utilitarism (*do ut des*), significantly involving private actors and investors as well, migration governance policies are, on the other hand, often a response to humanitarian emergencies or contingent events (such as armed conflicts or climate crises) and are therefore much less predictable or plannable.Thus, the Red Sea becomes a geopolitical laboratory where migration is not only a consequence of the crisis, but also a tool of diplomacy, pressure, and survival.

2.4 Structural determinants and PEST analysis

The analysis of migration flows in the Red Sea and the Horn of Africa requires a comprehensive reading of structural determinants from a PEST perspective, in order to understand how the various dimensions intertwine in shaping the pathways and dynamics of human mobility.

Politically, the region is marked by protracted conflicts, authoritarian regimes, and fragile institutions. The collapse of the Sudanese state, repression in Eritrea, and tensions between Ethiopia and Somalia are fueling flows of refugees and internally displaced persons that cross all national borders. Migration management has become an integral part of regional diplomacy: Ethiopia, for example, uses its position as a migration hub as leverage for negotiations with the European Union, while the Gulf States use African labor as a tool of economic and political power.

Economically, the lack of employment opportunities and increasing dependence on remittances (which in Somalia represent about 18% of GDP in 2024) are driving millions of people to migrate. Local economies, unable to absorb the youth labor force, turn mobility into a systemic safety valve, which nevertheless fuels new dependencies and vulnerabilities. Furthermore, the United States, China, Russia, Turkey, the European Union, and the Gulf States have established a direct or indirect

presence in the region, through military bases, infrastructure investments, and economic partnerships. As analyzed in the chapter *Maritime Routes and Infrastructure*, this dense network of global interests aims to protect the security of economic and logistical routes, but it is also extremely vulnerable to migration-related instability. The increase in irregular migration flows, the crisis in Sudan, and climate-related pressures are risk factors that could jeopardize the continuity of trade and maritime security.

On the social front, the generational factor plays a decisive role. A young and educated population, connected through digital and diasporic networks, sees migration as a path to personal and family emancipation. Mobility thus becomes not only an economic necessity, but a form of identity and global participation.

Finally, **from a technological standpoint**, innovations in surveillance and management of migration flows are profoundly changing the nature of migration.The adoption of biometric systems, digital databases and artificial intelligence technologies, supported by international programmes such as theEuropean Union Emergency Trust Fund for Africa (EUTF), aims to track and predict movements, but introduces new forms of control and digital inequality. Technological infrastructure, often imported and managed by external partners, not only fails to reduce migration flows, but risks creating new barriers for irregular migrants and widening the gap between security and rights.

Scenario 1 – High probability	The most likely scenario is one in which the status quo is maintained, with a focus on emergency management rather than structural governance. International powers continue to prioritize the stability of trade routes and maritime security, pushing comprehensive reforms of migration systems to the background. This results in largely uncontrolled and poorly monitored inflows and outflows, which are tolerated as long as they do not significantly affect the economic or logistical balance of the regions involved. The routes, rather than decreasing, tend to diversify and multiply, adapting to shifts in territorial control and to sudden crises. The increase in local conflicts and climate emergencies favors less-monitored and more risky routes, shifting the centers of pressure toward desert and coastal areas, with growing interconnection between eastern routes (toward the Arabian Peninsula) and western routes (toward the Mediterranean). Humanitarian crises are addressed with temporary interventions, while the root causes, such as political instability, economic inequality, and environmental degradation, remain largely unresolved. Overall, this scenario reflects a precarious balance, in which the geopolitical priority of maritime routes takes precedence over respect for rights and the integrated management of migration.
Scenario 2 – Medium-low probability	The medium-probability scenario envisages the establishment of agreements among African states for the shared management of migration flows. Initiatives of this kind may emerge under the decision of the African Union or through the strengthening or replication of regional partnerships that have already been tested, such as those active in some of the countries analyzed. However, their effectiveness depends heavily on the stability of governments, the availability of financial resources, and the administrative and managerial capacity of national and regional institutions. Recurring climate crises and the growing influence of younger generations could foster a shift toward more coordinated and inclusive migration policies. The younger generations in the Horn of Africa, who are graduated, more informed, and more digitally connected than in the past, are transforming migration into an intentional, planned, and transnational phenomenon. Online diasporas, communication platforms, and social networks are becoming tools for guidance and organization, reducing information costs and multiplying connections between countries of origin and destination. However, this growing digital mobility remains exposed to significant technological inequalities and the vulnerability of communication systems, which can be used not only to support mobility but also for surveillance and control. Despite the potential for greater regional cooperation, the process remains constrained by external pressures and internal structural limitations, producing uneven and geographically fragmented results, with progress varying depending on local political contexts and local institutional capacities.

Scenario 3 – Very low probability	In the low-probability scenario a multilateral governance system emerges based on agreements between African states and destination countries (in Europe, Middle East, or Asia) for the joint monitoring of regular migration flows, the creation of legal migration channels, the alignment of mobility with the needs of destination countries' labor markets, and the management of new push factors linked to climate change in countries of origin ("environmental migration"). At the same time, the major international powers (the United States, China, Russia, Turkey, the European Union, and Gulf States) continue to view the region as a strategic platform for the security of trade and maritime routes. Without structured agreements and shared governance of the phenomenon, migration risks becoming a source of political pressure, a factor of regional instability, and a systemic risk to global economic stability, especially if the management of migration flows remains fragmented and reactive. The model of multilateral governance implies more decisive intervention by international powers, not only as guarantors of security but also as agents of development, through bilateral agreements and partnerships with the UN High Commissioner for Refugees (UNHCR). Such cooperation requires, however, a level of mutual trust, political stability, and institutional infrastructure that currently seems difficult to achieve. The current regional fragmentation and the prevalence of immediate economic interests make this scenario, for the time being, more desirable than realistic.

3. Maritime Routes and Infrastructure

by Lisa Borlotti, Martino Fascendini

The Red Sea is at the center of delicate geostrategic dynamics in which actors, both state and non-state, compete for access to resources, control of shipping lanes, and the main channels of trade and communication. It is estimated that to date, approximately 15% of global maritime trade passes through the Red Sea routes, from the Suez Canal (an artificial waterway inaugurated in 1869 with subsequent expansions) to the Bab al-Mandeb Strait, making it a central hub for international telecommunications and a commercial chokepoint.

In addition to the African states analyzed in the introductory section, Russia, France, China, the U.S., and Italy also operate in the area. Among non-state actors, as discussed in the chapter on *Illicit Trafficking Routes*, groups and militias such as the Yemeni Houthis and Somali pirates are gaining ground, exploiting the region's instability to gain access to the strategic resources of the Red Sea.



Image 4: Map of the main ports, chokepoints, and strategic resources in the Red Sea, analyzed in this chapter. Map created by the Authors.

3.1 The Red Sea: From Maritime Security to Resource Control

Among the **factors (drivers)** that characterize the geostrategic dynamics in the Red Sea, and which manifest themselves continuously and consistently over time, two stand out as particularly relevant to decision-makers: on the one hand, **maritime security**, through the presence of ports (commercial and military), undersea infrastructure, and the trade routes themselves; on the other, **access to maritime resources**, in a contest played out between global interests and multilateral governance, through **agreements** entered into between local and international actors. These factors have a **two-folder nature**, in that they constitute simultaneously elements of friction and cooperation, thus giving rise to a complex and precarious regional balance with international implications. Within this analytical framework, it is through these elements that the strategic projections of the actors involved can be interpreted, revealing the extent to which the Red Sea constitutes an indispensable hub, to be considered simultaneously as both an element of cooperation and an element of division, as well as an arena of conflict over access to resources

A. Maritime Security: Ports, Infrastructure, and Shipping Lanes

The Red Sea's extreme geostrategic centrality is evident not only in the presence of commercial ports but also in the high level of military activity by the major global powers, which maintain numerous military bases in the area, of which Djibouti is a prime example. Furthermore, the presence of organized crime and terrorism in the Red Sea (see *Illicit Trafficking Routes*) has led to a growing increase in security threats and incidents, which has

further justified the construction of permanent logistical and military infrastructure along the coastal territories to control and protect commercial shipping routes. Therefore, the commercial and military naval presence exists not only to ensure commercial access but, above all, to guarantee the security of maritime routes. In fact, if access to the Red Sea were not guaranteed, as occurred in November 2023 with the disruption of transit and attacks

on routes through the Suez Canal, there would be 40% reduction in container traffic and a general increase in transportation costs. This is because shipping on these routes is diverted via the Cape of Good Hope, impacting global logistics, increasing transit times, and reducing the revenues of countries bordering the Red Sea. Not only that, but it is estimated that the increased distance would also necessitate the use of more containers with greater cargo capacity, effectively requiring transportation companies



Immagine 5: Djibouti - Source: Copernicus Sentinel 2A

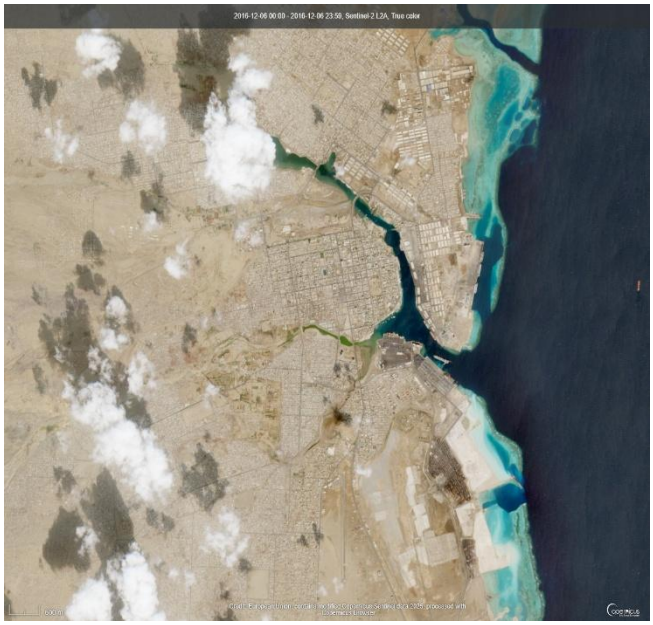
to adapt and make additional investments in their fleets. For these reasons, world powers view the Red Sea as an indispensable strategic, commercial, and military outpost, and the presence of international powers in the region is evident. In fact, the **competition for access to and the creation of new port and logistics infrastructure** through the evolution of these coastal territories over time are evident. This correlation is particularly evident in **Djibouti**, which hosts the largest US military base on the African continent, Camp Lemonnier, as well as the French naval base at Heron and the Italian military support base, Amedeo Guiglia. Over the last decade, the People's Republic of China has emerged as the key international actor demonstrating a high level of activity in the region; its military base is situated within the Doraleh Multipurpose Port, located 5 km west of Djibouti City[3]. Comparative satellite IMINT analysis derived from the European Copernicus constellation for 2016- 2025 period (see *Image 5*)

[3] China claims that its operations in the Red Sea are intended to promote peace and security cooperation. However, its expansionist ambitions and the dual-use nature of the port are fueling regional fears, increasing geopolitical instability and heightening the concerns of international actors in the area.

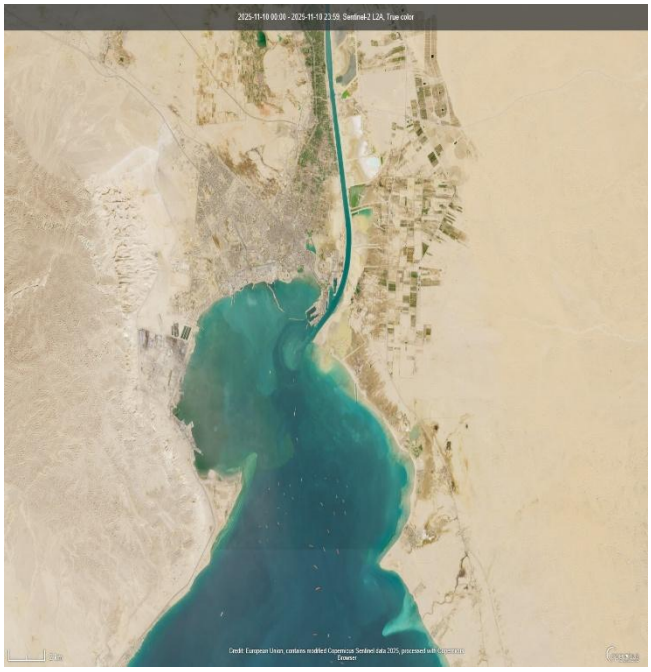
highlights both the recent construction, from scratch, of a mooring pier at the western end of the port (within the military zone) and the expansion of hinterland infrastructure serving the Addis Ababa - Djibouti railway, a vital transport artery in East Africa.

Also of particular significance in the Red Sea region is the port of **Port Sudan**; it is the country's main maritime gateway for international trade and currently serves as the *de facto* capital due to the ongoing civil war and intense fighting in Khartoum. Port Sudan's importance in the region is multifaceted: it is the primary maritime facility on the western Red Sea coast and a key node in the People's Republic of China's "One Belt One Road" project (i.e., the Belt and Road Initiative, BRI); it serves as a landing point for numerous telecommunications lines connecting to the undersea backbone; and it acts as a strategic transit hub for the flow of arms and influence driven by the interests of foreign powers.

The maritime hub also features, to the south, the "Port Sudan New International Airport", a railway connecting it to the continental hinterland (Khartoum), and a **maritime link to Jeddah**- Saudi Arabia's largest city after Riyadh and its primary port infrastructure, which also holds religious significance as a maritime crossroads for Muslim pilgrims traveling to Mecca. Jeddah lies opposite on the eastern coast of the Red Sea, hosting the "King Abdulaziz" airport to the north and the "King Faisal" military naval base to the south. Key northern hubs in the Red Sea region include the port of Suez, a crossroads and chokepoint linking the Mediterranean basin to the Indian Ocean, and the port of **Aqaba/Eilat**. Analytically, the high-probability scenario of escalating security tensions in this area, combined with the shifting *balance of power* toward the East and the pursuit of new maritime routes like the *Arctic Northern Route*, leads to the marginalization of the Mediterranean basin, with negative consequences for Europe. In this context, satellite analysis of infrastructure changes (multispectral band) and vessel traffic at Red Sea ports (radar band) over the medium-to-long term provides a significant *actionable forecasting* indicator; this allows for the extraction of operational data to shape commercial and military strategies for European governments and businesses.







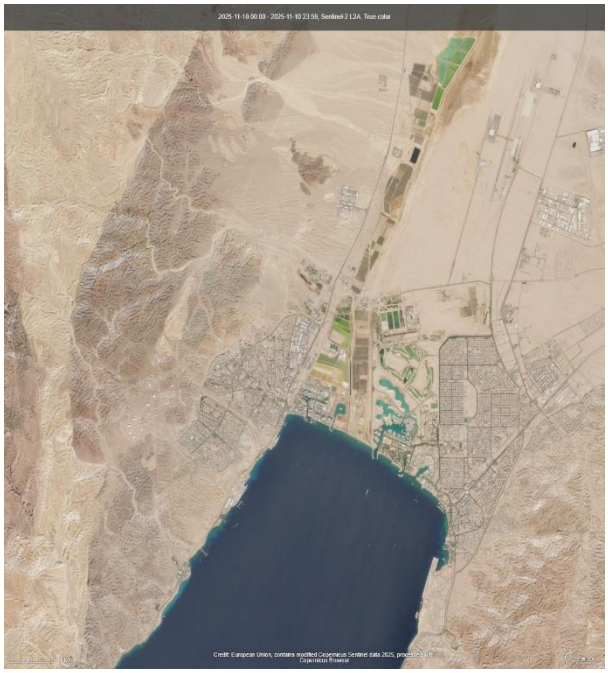


Image 6 (top left): Port Sudan - Source: Copernicus Sentinel 2A

Image 7 (top right): Jedda - Source: Copernicus Sentinel 2A

Image 8 (bottom left): Suez - Source: Copernicus Sentinel 2A

Image 9 (bottom right): Aqaba/Eilat - Source: Copernicus

The analysis reveals that the projection of national interests regarding access to port infrastructure, whether for commercial or military purposes, manifests primarily through the conclusion of bilateral or multilateral agreements with coastal states, as well as through the more or less veiled statements found in the preambles to such agreements. A case in point is Israel's recent recognition of Somaliland; this move highlights not only power projection in the Horn of Africa but also the significant vulnerability and volatility of regional balances, which risk being destabilized should these agreements trigger criticism, discontent, and chain reactions across the Red Sea region.

The case of Ethiopia is illustrative, as it lacks direct access to the sea (see *The Geopolitics of the Horn of Africa in the Red Sea*). This situation, combined with the need to diversify its reliance on Djibouti's ports, its traditional "Great Ethiopia" stance, and the desire to divert attention from domestic discontent, makes access to the Red Sea one of the country's primary objectives. To address this issue, Ethiopia pays Djibouti $1.5 billion annually for access to its port infrastructure. However, strong competition over maritime access persists between the two nations; Djibouti relies heavily on the flow of trade and energy transit through the Bab al-Mandab Strait, making it highly sensitive to regional changes. This sensitivity impacts both the stability afforded by its clientelist social structure and the credibility and stability that attract foreign investment. Meanwhile, Ethiopia harbors a strong desire to strengthen its presence in the Red Sea (see *The Geopolitics of the Horn of Africa in the Red Sea*) in order to lower the cost of goods for its population, which relies on seaborne imports for 95% of its supplies. Consequently, on January 1, 2024, Somaliland and Ethiopia signed a *Memorandum of Understanding* granting Ethiopia access to the port of Zeila (Seylac), including a 20 - kilometer stretch of coastline for a 50-year period, in exchange for potential official state recognition. A year later, on December 26, 2025, Israel also formally recognized Somaliland, driven by international geopolitical considerations and national interests regarding ports in the Horn of Africa. Both events sparked strong reactions from the Somali government and the international community, which decried the agreement as an assault on Somalia's sovereignty, territorial integrity, and maritime resources. The Somali federal union is already weakened by the separatist aspirations of various states; the recognition of Somaliland would set a precedent for other member states of the Federation and could encourage other international actors to recognize its independence.

However, strategic interests do not manifest solely on land. Indeed, the Red Sea is the **setting for veritable "sea channels"** that take the form of ever-expanding maritime routes, **both on the water and beyond it.**

Of these routes, the main ones are managed by about ten shipping companies, including

Maersk, MSC, CMA CGM, Hapag-Lloyd, and COSCO, that dominate containerized traffic. Furthermore, beneath the water's surface, the Red Sea plays a critical role. Indeed, approximately 20 submarine cables run along its seabed, carrying between 15% and 20% of global internet traffic and connecting Europe, Asia, Africa, and the Middle East. These cables transmit vital data for cloud services, financial transactions, military communications, and digital interconnections, making the Red Sea a genuine strategic bottleneck for global connectivity. This vulnerability manifests as a growing risk of sabotage by non-state actors; consequently, telecommunications operators face skyrocketing insurance premiums and increasing difficulty in finding vessels willing to carry out repairs in the area, leading to the suspension or delay of capital funding intended for the maintenance and reinforcement of these strategic segments. The two primary landing points for these submarine cables are Suez and Djibouti; their compromise would bring telecommunications across the Indo-Mediterranean region to a complete standstill, a scenario that must be considered a real possibility, given the high latency already caused by instances of tampering.

Therefore, strengthening satellite-based data transmission backup strategies, by promoting connectivity projects involving multi-orbit constellations such as the current European IRIS2 infrastructure (which, while unable to fully match the capacity of fiber optics, at least enables the management of emergency situations), constitutes a policy priority for the resilience of both military Command and Control (C2) systems and commercial and financial supply chains.

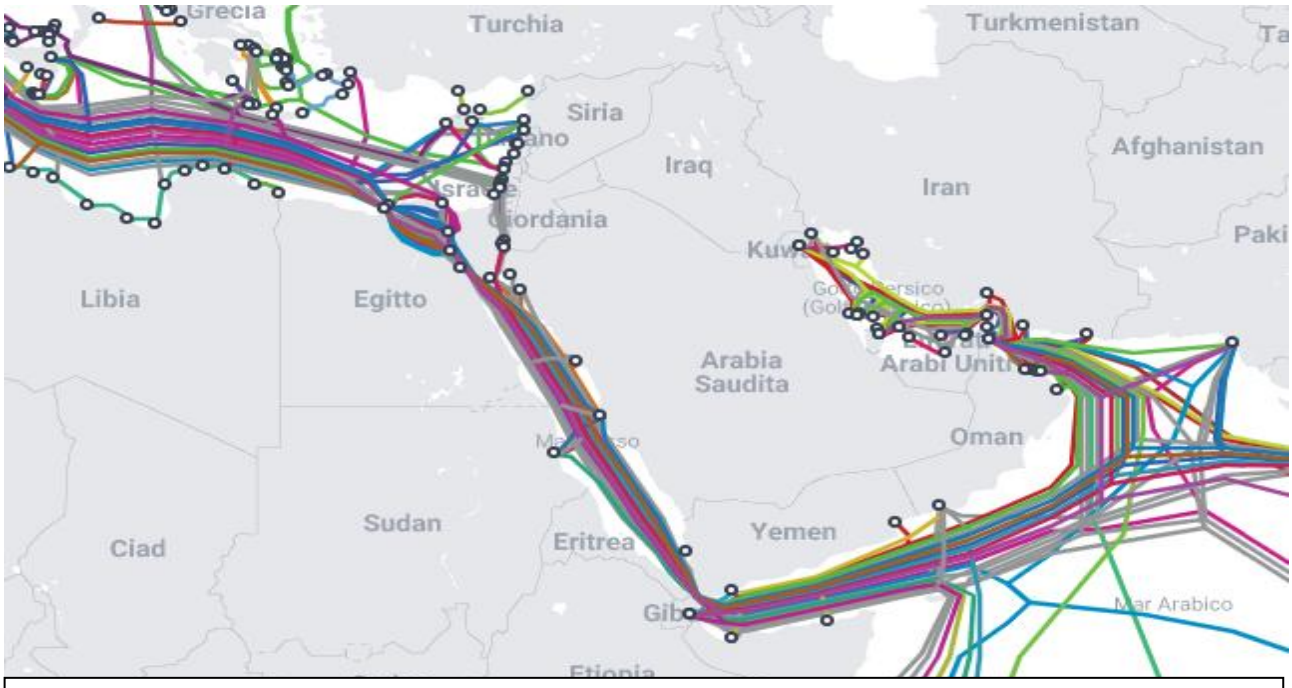


Image 10: Credit - Telegeography e Submarine Cable Map

B. Access to maritime resources: between global interests and multilateral governance

Defining what is meant by "resources" in the context of the Red Sea requires looking beyond the mere dimensions of maritime routes, infrastructure, and ports. The elements under analysis encompass both natural and strategic resources, ranging from fossil fuel and mineral deposits to international political recognition. Access to resources thus becomes a driver of socioeconomic development and, simultaneously, a tool for political and military projection. Furthermore, the Red Sea remains a critical artery for oil and gas while emerging as a hub for renewable energy and green hydrogen, with Saudi Arabia and Egypt leading the region's solar and wind transition. The challenge lies in balancing route security, sustainable investment, and international cooperation to transform the Red Sea from a traditional energy corridor into a laboratory for the global transition. International actors involved in the major strategic dynamics of the Red Sea must negotiate concessions, rights of passage, and port infrastructure development with the coastal states. In this context, alliances and development cooperation agreements take on a dual significance: on the one hand, they foster economic growth and regional integration; on the other hand, they serve geopolitical interests and foreign policy objectives, often linked to privileged access to resources.

However, the other side of the coin is the risk associated with resource access arrangements that disadvantage coastal states. Unfavorable concessions and unbalanced investments can lead to **debt-trap** situations, where the debt burden constrains economic and political sovereignty. Furthermore, the exploitation of coastal territories for the development of ports, military bases, and logistics hubs serving third-party states risks yielding only marginal benefits for local populations, as evidenced by the cases of Djibouti, Eritrea, and Somaliland.

In terms of energy, the Red Sea and the Horn of Africa present a mosaic of opportunities and vulnerabilities. Ethiopia holds gas reserves in the Ogaden Basin, with plans to export to the Red Sea; Eritrea is exploring its geothermal and hydrocarbon potential; Somalia possesses largely untapped offshore deposits and active exploration and production contracts; and South Sudan is already an oil producer but relies on export infrastructure passing through Sudan. Meanwhile, Djibouti and Somalia have launched small-scale solar and wind projects, signs of an energy transition aimed at reducing import dependency.

In this context, access to resources is not merely a matter of material availability, but one of multilateral governance and strategic partnerships. The ability to integrate global and local interests, balance development with political recognition, and avoid dynamics of asymmetric exploitation will be crucial for the

region's stability. However, the scarcity of shared maritime security initiatives in the Red Sea makes this a long and complex process. The PEST analysis presented below allows for the breakdown of the political, economic, social, and technological factors influencing these dynamics, highlighting how the internal stances of individual countries translate into external projections, alliances, and investments.

3.2 Structural determinants and PEST analysis

Analyzing maritime routes and infrastructure in the Red Sea and the Horn of Africa requires an integrated assessment of structural determinants through a PEST lens, in order to understand how these various dimensions intertwine to shape international and regional strategies.

Politically, the region is characterized by intense multilateral and bilateral competition for access to maritime routes and resources, with military and commercial outposts serving as instruments for projecting regional power. Access to the sea can act as either a stabilizing force or a source of potential fragmentation; in some instances, such as the case involving Ethiopia and Somaliland, it becomes leverage for securing political and state recognition. Against this backdrop, the sovereignty of coastal states remains a critical factor; foreign concessions and military bases can undermine this sovereignty, thereby compromising stability and autonomy, and influence international stances and alliances.

Economically, the Red Sea is a vital corridor for international trade (energy routes, container shipping, and general cargo); its ports and logistics infrastructure (Djibouti, Port Sudan, Berbera) serve as strategic hubs for the transit and storage of goods (see *Map 1*). However, amidst various soft and hard power strategies, African states face significant risks regarding *debt-trap diplomacy* linked to unfavorable concessions and external investments. In this context, opportunities for regional economic development, driven by regional cooperation and energy diversification (gas, oil, renewables), remain to be fully explored. Finally, renewable energy investment projects and programs offer prospects for an energy transition that benefits local and regional actors, supported by regional and continental organizations (see *The Geopolitics of the Horn of Africa in the Red Sea*).

Socially, the direct benefits of port infrastructure for local populations remain limited; furthermore, if access to resources is perceived as exclusive or imposed by external actors, it can give rise to social tensions. Nevertheless, the advancement of development cooperation initiatives lends legitimacy to the presence of external actors and can strengthen the countries' internal stability. Finally, maritime security plays a crucial role in facilitating migration routes and regional mobility. Port

security and access directly affect migrants' ability to move, whether legally or via irregular routes (see *Survival Routes: Migration in the Horn of Africa and the Red Sea*).

Finally, from a **technological standpoint**, ongoing investments in port modernization, the digitalization of logistics chains, and the development of communication channels are key factors for the region's competitiveness and strategic importance. However, it remains to be seen who the primary beneficiaries of these measures will be. Furthermore, the technological capacity to monitor and protect maritime routes is a crucial element for regional resilience and stability. The Red Sea thus confirms itself as a theater of contention for access to resources, where internal dynamics intertwine with external pressures, and where the energy transition compounds geopolitical competition. Future trajectories will depend on the ability of coastal states to transform resources into tools for inclusive development, avoiding the risk of becoming mere pawns in the global game.

Scenario 1 – High probability	Regarding maritime routes and infrastructure, the most likely scenario involves intensifying regional tensions over resource access, coupled with continued interventions by international hegemonic powers and security threats from non-state actors. A significant increase in investment is expected, driven by substantial programs and exclusive bilateral agreements with African coastal nations for resource access. These investments are aimed at upgrading or creating dual-use port infrastructure, undertaken by powers already established in the region. Simultaneously, new international players, such as India, are entering the scene in response to the area's growing security threats and instability. This dynamic creates fertile ground for increased risks of debt traps, escalation, and fragmentation, fueled by complex and volatile domestic politics, global strategic interests, and a lack of robust multilateral governance in the region. In this context, Red Sea trade routes are subject to frequent realignments and high volatility. This makes it impossible to replicate the resilience demonstrated in the past and leads to a slow deterioration of shipping activity, with a progressive decline in volumes. At the same time, some shipping companies are boosting their earnings by capitalizing on the longer travel distances; ultimately, however, this dynamic places the financial burden on the end consumer.

Scenario 2 – Medium-low probability a	Regarding maritime routes and infrastructure, high volatility in regional stability is anticipated; however, this does not pose a risk of increased costs or security threats in the short to medium term. A general status quo is expected regarding the presence of international actors and tensions over resource access, alongside a gradual, moderate increase in maritime infrastructure interventions and investments. Trade routes demonstrate medium- to long-term resilience, effectively containing regional uncertainties and disruptions to ensure the continued operation of these routes. The strengthening and expansion of bilateral agreements on regional aid are taking place in exchange for resource access granted by international hegemonic powers to African coastal states, accompanied by a persistent presence and the risk of debt traps. There is a gradual move toward multilateral governance regarding access to maritime resources, with international and regional organizations intervening only in cases of severe security crises that affect international trade and the security of shipping routes.
Scenario 3 – Very low probability	Regarding maritime routes and infrastructure, a gradual easing of regional tensions is anticipated, paving the way for dialogue on cooperation and multilateral governance concerning access to maritime resources. The improved security stability of trade routes creates fertile ground for establishing multi-level forums, launching development cooperation programs, managing trade routes in a controlled manner, and limiting the presence of foreign military infrastructure in the region. This shift opens the door to additional commercial actors, moving away from an oligopolistic situation toward pluralistic commercial competition and more equitable control over trade routes.

4. Illicit Trafficking Routes

by Marisa Cocchiaro

The East African region generally presents the highest levels of crime in the continent, due to armed conflicts, often fueled by ethnic divisions, and the presence of armed groups and non-state militias. This is not surprising, as the same actors who manage conflicts also control the trafficking that finances and supports them. Furthermore, by observing the migratory routes and maritime infrastructure established previously, it is possible to understand the volume of illicit flows navigating these same corridors. The prevalent criminal activities in this area include illicit arms flows, people and goods, human exploitation, illegal resource extraction, and complex extortion schemes. The actors involved range from state actors to transnational criminal networks to international actors. All these elements contribute to a complex picture. To avoid analyzing a multitude of heterogeneous criminal manifestations, the following section aims to focus on arms trafficking. The latter, being influenced by institutional corruption, infiltration of regional and extra-regional actors, exploitation of trade routes and the growing militarization *leakage* systemic analysis of the arsenals present in the area, sheds light on a series of structural elements that explain the criminal dynamics of the Horn of Africa. The phenomenon of arms trafficking, which is constantly increasing, also highlights the failure of the states involved in its fight and their mutual distrust which limits any attempt at cooperation.

The governance of traffic is driven by the political and strategic risk management that uncontrolled proliferation entails: arms trafficking is both a cause of the crisis, since it supports the non-state actors involved, and an effect of it, given the increase in militarization in the area and the reduced control of shipping routes in the Red Sea. Beyond strategic considerations, arms trafficking has tangible human consequences: Barbara Frey, UN Special Rapporteur on the prevention of human rights violations committed through small arms and light weapons (SALW), highlighted how the uncontrolled spread of small arms can be responsible for levels of suffering and mortality on a mass scale, equal to those of an armed conflict, even in the absence of a declared war. This is demonstrated by how the humanitarian crisis in the area appears to date aggravated by the increase in weapons in the hands of civilians.

4.1 Mapping arms flows in the Horn of Africa

To understand the role of each country analyzed, the following table provides a summary framework through the organized crime index of each country, adjusted for arms trafficking. The index takes into account the distinction between cross-border trafficking and internal diversion of weapons from legal to illegal channels, including import, export, acquisition, sale, delivery and transfer, components and ammunition. It also takes into account the geographical spread of the networks, the human involvement in the transport, brokerage and diversion phases, the violence associated with the flows, the type of weapons involved (*firearms,* SALW,*dual-use technologies*) and the availability or scarcity of the goods. The degree of corruption necessary for the functioning of the networks and the regional context are assessed in line with the operational definition of *organized crime* adopted by the index, based on illegal activities conducted by groups acting in concert to obtain material benefits through violence or corruption

The factors are described in terms of social impact and coordination with maritime routes (see *Maritime Routes and Infrastructure*) including those that facilitate both transnational trafficking and internal dispersion. The table therefore includes ports, areas, and key players, with the role each country plays in the trafficking networks.

Country and the crime index adjusted for arms trafficking	**Key ports/areas**	**Function:**	**Key actors:**
Sudan 9.50 (+0.50 compared to 2023)	**On the Red Sea**: Port Sudan, Suakin, Tokar; **Conflict Areas**: Darfur, Khartoum **Border areas**Rashaida, border with Egypt, Chad, Libya	• Crucial point of arrival and internal redistribution of SALW that fuel the civil war: internal redistribution is strongly mediated by RSF and actors embedded in the State. • Proxy battlefield shaped by external military support for the SAF and RSF. • Weapons are destined not only for armed groups, but also for civilians and criminal actors, fueling illicit sales and secondary redistribution. • Arms flows made possible by regional transit channels and cross-border logistics.	**Internal**: • State security and justice institutions that are permeated, ineffective and complicit. • SAF e RSF. • Tribal networks control routes especially in conflict and border areas (e.g. the disputed area on the border with Egypt). **External**: • Türkiye: Illegal weapons for SAF. • Iran: drones, training, intelligence for Burhan's faction to secure control over the Red Sea. • United Arab Emirates: key supplier to RSF via Chad, Libya, Uganda; linked to gold-financed networks. • Russia/African Corps: strategic military aid and illegal energy for the RSF in exchange for access to gold. • China: documented source of weapons.

Somalia 9.00	**Key ports on the Gulf of Aden**: Zeila, Bosaso, Berbera, Qandala **Secondary corridors**: routes between the coasts and the hinterland with junctions controlled by local networks, leakage points from official stocks.	• Acts as primary maritime hub and as a crucial transit point for transnational maritime networks. • Weak stockpiles and systematic leaks from official arsenals fuel the flow of weapons. • Diverting point for Iranian supplies destined for Yemen. • Centralization of surplus weapons from regional conflicts (e.g. Ethiopia, Yemen). • Logistical integration with other smuggling activities that share routes and intermediaries.	**Internal:**[4] • Clan militias in Puntland and Somaliland. • Local intermediaries along the coast • Institutional actors that facilitate leakages from official stockpiles. • Private business networks providing logistics (through freight handling and informal financial services). **External:** • Transnational criminal networks. • Ansar Allah (Houthi) as the main recipient. • Iran: source of weapons destined for the territories of Yemen. • United Arab Emirates (UAE) and Oman: routes of origin and transit of cargoes. • Ethiopia: contribution of Ethiopian war surplus entering Somali markets through secondary routes.
Ethiopia 8.50	Tigrai, Amhara, Afar, Oromia, Dire Dawa, Moyale, Ogaden, **border areas with:** Sudan, South Sudan, Kenya, Somalia, Djibouti	• Fundamental land corridor along the main traffic routes (northern, western, southern, eastern). • Internal latent and not latent conflicts (Tigray, Amhara and Oromia) increase the availability of weapons *battlefield-grade* on the internal market, promoting organised crime and generating threats to regional security.	**Internal**: • State actors, often involved in illicit activities, and federal/regional police commissions responsible for the administration and control of weapons. • Oromo Liberation Army and Amhara militias involved in kidnappings, extortion and arms trafficking to finance the insurgency. • Criminal networks operating in border regions. **External**: • Groups from neighboring countries exert their influence in the border regions, • Transnational criminal networks. • Extra-regional actors involved in the arms trade.

[4]For the purposes of the analysis, it was decided to avoid discussing al-Shabaab, the Islamic State in Somalia, and piracy, which will be covered in the next edition of Scenarios.

Eritrea 8.00 (+0.50 compared to 2023)	Massawa, Assab, Isole Dahlak	• The Red Sea coast serves as a major transshipment hub for weapons destined for conflict zones such as Sudan and Ethiopia. • Key link in the maritime arms smuggling chain between the Arabian Peninsula and the Horn of Africa. • Recycling of war stocks. • Actively injects weapons into the regional system. • Connection with Sudan and Central Africa. • Eritrean military vehicles looted during the conflict in Tigray are being refurbished and sold.	**Interior:** • State actors involved in illicit activities. • Structural collaboration between the State and criminal networks of weapons, gold and people. **Exterior:** • Groups linked to transnational maritime crime, which use dhows for smuggling along the Horn of Africa. • Rebel groups supported by Eritrea - e.g. Amhara militias. • Sudan, particularly active in gold flows that serve to finance the arms market. • Iran, Ansar Allah (Houthi) and Yemen remain potential[5] actors in 2025
Djibouti 8.00 (+0.50 compared to 2023)	Port of Djibouti, UNVIM, GMCP, Doraleh, area Obock / Bab al-Mandeb, small coastal islands porous borders with neighboring countries	• Critical point on the eastern cross-border trafficking route for illicit weapons and sophisticated equipment bound for Ethiopia, Sudan, South Sudan and Somalia. • Use of small coastal islands from which traffickers operate, the same actors who rely on smaller ports on the coast opposite the Yemeni port of Mokha. • Significant increase in arms flows linked to instability in the Red Sea and the intensification of Houthi hostilities.	**Internal:** • Military personnel, officials, and executives of public companies who actively facilitate trafficking. • Secret police and security forces corrupt people who facilitate the transit of weapons. **External:** • Arms trafficking networks towards clan militias and jihadist groups controlled by mixed actors operating on coastal islands and minor ports linked to multiple trafficking operations (arms, drugs, migrants, counterfeit goods, gold, money). • Iranian and Yemeni actors pass through Djibouti to supply African armed groups. • Chinese actors linked to shipments to conflict zones in Sudan and South Sudan.

Sources: see bibliography

[5] The presence of Iran, Houthis and Yemen as actors involved in arms trafficking in Eritrea is supported by journalistic sources documenting Iranian routes to Ansar Allah through the Dahlak archipelago in Eritrea, in the lower Red Sea (Maritime Executive, 2025)

Although not included in the table, it is important to keep in mind that situations of conflict in neighboring countries[6] tend to exacerbate the vulnerability of border areas to crime. The border areas between the countries of the Horn of Africa are among the most vulnerable in the region, as they are contested by peoples often separated by artificial post-colonial borders.

These neighboring areas are on the fringes of state authority, often structured on clientelism and corruption (see *corruption rate in geographic box*). Their centrality in cross-border movements, chronic marginalization, institutional weakness and protracted conflicts contribute to creating an environment in which criminal networks can operate with limited state interference. (*cf. The Geopolitics of the Horn of Africa in the Red Sea*). These areas have historically received little investment, declining since 2022 (see *The Geopolitics of the Horn of Africa in the Red Sea*), and governance structures at national, regional and local levels remain economically weak. Conflicts and institutional weakness further reinforce this vulnerability. Porous borders amplify the dynamics: regions like Gedo or the Ethiopia-Sudan-Somalia corridors serve as key transit points for arms and human trafficking (see *Survival Routes: Migrations in the Horn of Africa and the Red Sea*), and smuggling. Clan militias, transnational networks, and corrupt state actors exploit the geography of border areas to transport weapons, collect illegal taxes at checkpoints, and profit from smuggling.

In this framework, the Red Sea crisis and the militarization of the Bab el-Mandeb Strait, triggered by Houthi hostilities, are acting as a multiplier of arms trafficking, opening windows of logistical opportunity, weakening maritime interdiction capacity, and impacting land flows through Sudan, Ethiopia, Somalia, and Djibouti. Additionally, the civil war in Sudan, regional conflicts in Ethiopia and Somalia, the easing of some UN embargoes, and the growing involvement of extra-regional actors, which together amplify the demand, availability, and regional circulation of weapons along increasingly integrated networks.

In addition to geopolitical shocks, structural factors ensure the continuity of the illicit arms market in the region: financing networks based on gold and fuel smuggling, parallel economies entrenched in border areas, and logistics networks that connect the flow of arms, as well as people and high-value goods. In this regard, illegal trafficking contributes to the degradation of ecosystems through direct contamination caused by attacks on ships, the illicit extraction of fossil materials, extraction and smuggling techniques, the use of trafficked technologies, and increased carbon emissions due to changes in maritime routes.

Although varying degrees, arms trafficking has undergone considerable changes in the countries analyzed. In Sudan, the increase in weapons on the black market is having long-term effects on internal security. Since mid-2023, demand has increased, with arms shipments from abroad

entering the country on a regular and consistent basis, approximately twice a month. Meanwhile, the trafficking is fueled precisely by the smuggling of gold and fuel along the same routes used for arms and people. In Somalia, weak maritime controls and coastal vulnerabilities facilitate the entry of weapons and their redistribution inland, in a context where maritime smuggling remains a key vector. In Ethiopia, trafficking is fueled by rising internal tensions. Between 2023 and 2025, Eritrea and Djibouti have assumed an increasingly central role in arms trafficking, due to their strategic location on the Red Sea and the growing use of their coastlines, ports, and islands as operational corridors linked to the instability in the region. The entire region is affected by instability in the Red Sea and the presence of the Houthis, both targets and as a contextual factor, along with widespread corruption among the police, military, and intelligence services and a selective use of repression, often directed at the internal opposition rather than trafficking.

In the governance of illicit arms flows a series of lines of cooperation and fracture intersect, influencing the stance of the Horn of Africa. These countries are aligned, at least in part, with UN and AU standards regarding the non-proliferation of firearms. Their alignment is manifested primarily through participation in interstate cooperation mechanisms (see *The Geopolitics of the Horn of Africa in the Red Sea*). At the international level, the commitment to the non-proliferation of firearms is guided by the UN Programme of Action (PoA) to Prevent, Combat and Eradicate the Illicit Trade in Small Arms and Light Weapons (2001) and by their Arms Trade Treaty (ATT). The countries covered in this analysis have all implemented regulatory measures in line with the PoA, albeit partially and dependent on external assistance. Although their accession to the ATT is not yet complete, the countries' commitment to implementing its principles is evident. Eritrea, Ethiopia, Sudan and Somalia are not part of the ATT as they are or have been at least partially subject to an arms embargo; Djibouti, however, is the only signatory state in the geographical area of interest, even if it has not yet adopted ratification instruments. All countries have expressed their willingness to align with the measures proposed by the Treaty, as evidenced by the other non-proliferation instruments adopted at the regional level. Among these are Nairobi Protocol and participation in the Regional Centre on Small Arms (RECSA). The former, signed and ratified by all countries (with the exception of Somalia which is a signatory but has not yet adopted instruments of ratification), promotes intelligence sharing, cooperation, accountability, law enforcement, control, and management of SALW held by governments and civilians. The latter aims to coordinate action against the proliferation of small arms and light weapons in the Great Lakes region, the Horn of Africa, and neighboring states. Regional cooperation for the traceability of civilian weapons, supported by RECSA and UNDP,

complements training programs to strengthen border control capacities conducted by multilateral actors such as UNODC and Interpol. Furthermore, the UN Convention against Transnational Organized Crime and the related Firearms Protocol establish significant criteria for the fight against organized crime and proliferation, but not all States adopt the necessary measures to ratify them, creating further imbalances between obligations and available tools. At the same time, Somalia, Djibouti, Eritrea and Sudan are parties of international initiatives dedicated to maritime security and cooperation, including the Red Sea Project, aimed at improving maritime security and border control. In addition, Somalia, Kenya and Djibouti are involved in the Global Maritime Crime Programme (UNODC), which aims to strengthen the capacities of the entire criminal justice system. Participation in these programs confirms the willingness to cooperate on maritime security, often to preserve international legitimacy in the face of external pressures. In this context, security remains one of the key factors in projecting influence into the Red Sea for countries in the region, which also engage in bilateral agreements that draw on regional frameworks such as the IGAD conventions on extradition and mutual legal assistance, although these are not yet operational. Taken together, these measures provide a shared legal frameworks with clear standards for marking, record keeping, destruction of excess arsenals, intelligence sharing and mutual legal assistance, which should facilitate disarmament programs with the technical support of the AU and the UN. Although almost all states in the region have ratified the Nairobi Protocol, only Djibouti and Ethiopia have ratified the IGAD conventions on extradition and mutual legal assistance, which were intended to bridge the gap between political intentions to combat trafficking and their effective enforcement.

Despite this, a recent assessment of the response to arms trafficking in the Gulf of Aden and the Red Sea highlights, however, that the naval and coastal capabilities remain insufficient, a heavy reliance on opportunistic patrols and *ad hoc* information sharing ad hoc, difficulty in monitoring small vessels such as dhows[6], and inconsistent cooperation between maritime police forces and coast guards in the region. These factors, combined with regional rivalries and international interference. (see *The Geopolitics of the Horn of Africa in the Red Sea*), limit any attempt at coordination. For example, the actions of Eritrea, Djibouti, Somalia, and Sudan to ensure the security of their Red Sea coastline are internally aimed at uholding the authority of central governments, but externally are intended to consolidate competitive positions, particularly

[6]Dhows are small, traditional vessels that sail the Red Sea and Gulf of Aden, generally for fishing. Their structure, lack of reliable records, and low operating costs make them ideal for illicit trafficking.

within Ethiopia. International embargoes represent another critical point: the embargo on Sudan suffers from minimal enforcement, while the lifting of the arms embargo on the Somali armed forces and federal government increases the risk of diversion and does not appear to have had a much impact on deterring proliferation to militias and non-state groups present in the country. At the same time, analysis of trade-based money laundering practices show how opaque trading schemes, the use of free trade zones and fluctuations in the invoicing of goods make it possible to shift value and conceal the proceeds of illicit trade, including those related to small arms. Furthermore, the presence of military bases and non-regional weaponry, while theoretically a deterrent, represents an additional source of leakage, especially where the political class is corrupt or involved in illicit trafficking.

The presence of extra-regional actors, which should facilitate coordinated efforts to control infrastructure and train local forces, in practice results in competition for bases and port access that contributes to hardening existing fault lines.

The same lines of cooperation and fracture explored apply equally to the proliferation of SALW as well as to large weapon systems and dual-use technologies, with amplified effects since the latter have the capacity to redefine regional power balances. With regard to dual-use technologies (such as engines, electronic and chemical components used for Unmanned Aerial Vehicles (UAVs) and other systems), the possibility of legal importation further increases the need for effective international cooperation to trace their supply chains, in compliance with export control standards and lists of sensitive goods.

4.2 Structural determinants and PEST analysis

The analysis of maritime routes and infrastructure in the Red Sea and the Horn of Africa requires an integrated assessment of the structural determinants from a PEST perspective, to understand how the different dimensions intertwine in shaping international and regional strategies.

On the political front, trafficking in SALW, large weapon systems, and dual-use technologies increase the fragmentation of political and military control over the Red Sea, strengthening the capabilities of non-state actors already present and creating opportunities for potentially emerging ones. From a diplomatic standpoint, the fragmentation and low controllability of the non-state actors jeopardize stabilization processes in the region, due to a major security dilemma among key regional actors (United Arab Emirates, Russia, People's Republic of China, United States, Saudi Arabia, Iran), greater risks of military escalation, as well as a wider range of opportunities for these actors. Furthermore, governance challenges in border areas lead to an intensification of uncontrolled cross-border movements and an expansion of criminal markets.

Economically, such trafficking contributes to a decline in confidence among investors outside the region, increasing transportation risks through the Red Sea and (drastically) raising insurance costs for local companies and those transiting the region.

Business continuity and supply chains are at risk due to the increasing variety of types of threats. Furthermore, criminal activities finance a sector of the informal economy, amplified by illegal extraction and trafficking raw materials.

On the social front, the rise in arms trafficking contributes to the exposure of local populations to humanitarian crises, which are often the primary cause of both regular and irregular population movements both within countries and across borders (see *Survival Routes: Migrations in the Horn of Africa and the Red Sea).*

Poverty, competition for resources and the presence of militias and deep-rooted criminal networks contribute to the increased proliferation of weapons in the hands of civilians within the region. This proliferation, in turn, has an enormous social impact, driven by the rise and normalization of violence. Conflicts generated by the heightened capabilities of non-state actors facilitate human trafficking and smuggling toward Europe, generating multiple social risks in the Old Continent. From an electoral standpoint, the risks for European policymakers are increasing both domestically and in terms of international engagement. Furthermore, companies operating in affected countries may suffer significant reputational and legal impacts, especially in light of potential ties to third parties over whom they have no control regarding financial and logistical flows.

From a technological standpoint, illicit trafficking endangers critical infrastructure such as submarine cables (see *Maritime Security: Ports, Infrastructure and Routes*), divert advanced technologies toward illicit military production and threaten the military-technological superiority of Western countries operating in the area, as well as coastal states. The technological risk can also lead to negative impacts in the cyber domain, with far-reaching global repercussions beyond the region. Furthermore, the presence of external actors who sell or divert advanced technologies into the hands of non-state actors technologically strengthens criminal networks.

Scenario 1 – High probability	With regard to criminal activities, particularly arms trafficking, an upward trend is observed between 2023 and 2025, and a steady increase can be expected in the coming years. Furthermore, the divergences between the plans of the countries involved render international and regional cooperation mechanisms ineffective. The growth in illicit arms supplies leads to a strengthening of militias and criminal networks in the region, which are thus able to consolidate their territorial control, accelerating the erosion of state authority and the gradual, yet steady, fragmentation of power. Criminal networks and illicit economies thrive under these conditions; meanwhile, arms trafficking fuels their growth and, at the same time, expands thanks to the profits it generates. The rise of armed groups and illicit arms trafficking normalizes violence at the local level and leads to increased risks for critical infrastructure in the area. Land and maritime infrastructure becomes more vulnerable to attacks by non-state groups, and the operational risks faced in this key area for international trade drive up insurance premiums and partially divert trade routes. Growing foreign involvement and the militarization of the area increase the risk of leakage and, with it, the presence of drones and advanced technologies in the hands of militias.

Scenario 2 – Medium-low probability	Foreign involvement is increasing considerably, and with it, ground-based weaponry as well. The militias thus have access to a greater quantity of military equipment, due both to systemic leakage and to direct interference by extra-regional actors in the conflicts in the Horn of Africa. In this context, advanced technologies and large weapon systems assembled using dual-use components have a significant increase on illicit arms markets. These markets, in turn, are expanding massively, both in terms of volume and in terms of the sophistication of the smuggled goods. Thanks to the availability of these weapons and the increase in profits and their logistical capabilities, non-state groups are becoming entrenched and acquiring capabilities equal to or greater than those of state forces, which are thus further weakened. Territories, resources, and logistics hubs fall under the control of parastatal regional cartels that facilitate the proliferation of advanced technologies and components through systematic sabotage of the region's key infrastructure. The high commercial risk leads to frequent disruptions in the Red Sea and the land corridors of the Horn of Africa, which result in severe disruptions to trade routes and insurance premiums reaching extreme levels, while global supply chains suffer a very severe impact. To counterbalance the disruption of supply chains passing through the Red Sea, there is a risk of significant infiltration of illegal economies into regional supply chains. Compounding the geopolitical, economic, and social situation, this scenario poses a risk of collapse for the region's ecosystems, exacerbated by illegal mining, maritime attacks, and new, high-emission trade routes.

Scenario 3 – Very low probability	Media attention and the intervention of extra-regional states acting as game changer in the region's conflicts, particularly in Sudan, lead to a gradual de-escalation of the conflict and, consequently, to a reduction in the immediate demand for weapons. The full implementation of the cooperation mechanisms outlined in the text improves intelligence sharing among countries and leads to a significant reduction in trafficking of SALW, dual-use technologies (primarily thanks to the cooperation of private actors involved in the supply chain), and, consequently, large weapons systems as well. The intensification of international cooperation is therefore accompanied by a strengthening of maritime capabilities throughout the region, more efficient controls, and active collaboration from private entities involved in the supply chain, driven by economic incentives, legal protections, and the need to safeguard their businesses in an area that is becoming increasingly stable. The lack of materials, funds, and logistical access available to them leads to the gradual dissolution of transnational criminal networks in this area and a systematic weakening of actors competing with central governments. Reduced internal violence allows for the resumption of forms of community-based governance both in the central areas of countries and in peripheral regions where state control has historically been weaker. The reduction in illicit trafficking and illicit financial flows allows, on the one hand, for the resumption of business continuity and the stabilization of insurance premiums, and on the other hand, for greater economic transparency. Environmental degradation slows thanks to the decrease in illegal extraction, trafficking, and maritime attacks.

Sources classification

Source reliability		
A	**Reliable**	**No doubt of authenticity, reliability, or competence**; it has a record of complete reliability.
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D	**Usually unreliable**	**Significant doubt** about authenticity, reliability, or competence; however, it has provided valid information in the past.
E	**Unreliable**	**Lack** of authenticity, reliability, or competence; record of non-valid information
F	**Not evaluable**	**There is no basis for evaluating the reliability of the source**

Content of the information		
1	**Confirmed**	**Confirmed** by other independent sources; **logical** in itself; **consistent** with other information on the topic
2	**Allegedly true**	**Not confirmed; logical** in itself; **consistent** with other information on the topic
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4	**Uncertain**	**Not confirmed;** possible but **not logical**; there is **no other information** on the topic
5	**Unlikely**	**Not confirmed; not logical** in itself; **contradicted** by other information on the topic
6	**Not evaluable**	**There is no basis for evaluating the reliability of the source**

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Data updated on 31/01/2026

Cover photo made with Artificial Intelligence

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Scenari

Report for decision makers

ISSN 2785-3217

Navigating the Red Sea Crisis: Migrants, Infrastructure, and Crime

Report
N. 9/2026
January

Edited by

Alessandro Vivaldi

Reviewer

Valentina De Matteis

Graphics

Andrea Speziale



Edited by

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