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## RED SEA RIVALRIES: THE GULF, THE HORN, & THE NEW GEOPOLITICS OF THE RED SEA



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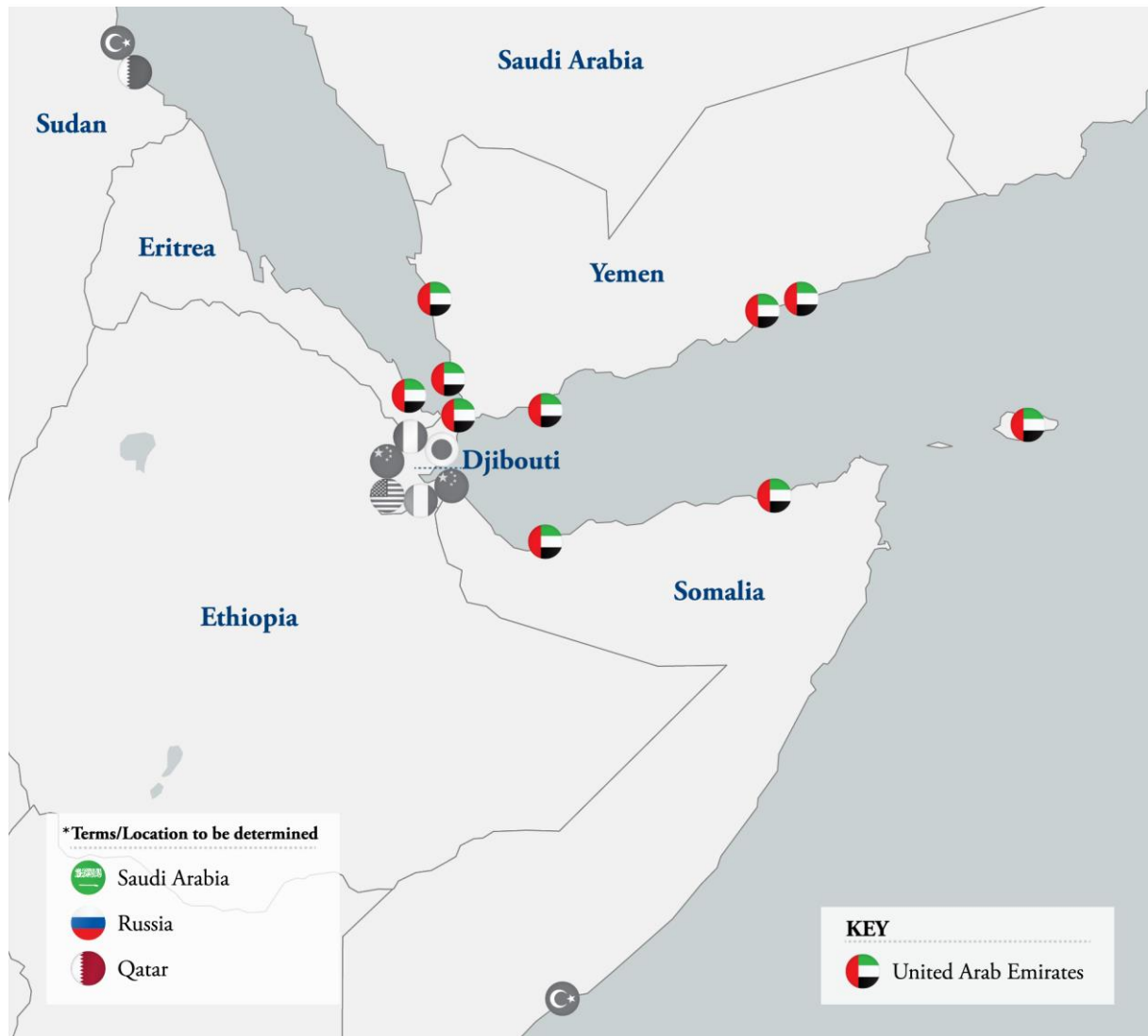
Zach Vertin<sup>1</sup>

### INTRODUCTION

Gulf states are asserting themselves in the Horn of Africa as never before. This unprecedented surge in political, economic, and strategic engagement across the Red Sea is challenging old assumptions and erasing old boundaries. As the United Arab Emirates (UAE), Saudi Arabia, Qatar, and Turkey seek to expand their spheres of influence—including through commercial ports and military outposts on Africa’s Red Sea coast—fierce Middle Eastern rivalries are playing out on a larger chessboard. Interest from great powers has further complicated the changing geopolitical landscape as China’s arrival in Djibouti brings the number of foreign militaries in the tiny port nation to five. China, France, Italy, Japan, and the United States are all now stationed at the fulcrum of the Red Sea and the Gulf of Aden. India and Saudi Arabia have also signaled interest in establishing bases in Djibouti, while Russia has flirted with its own strategic presence in the Horn. For the fragile African states on the western shores of the Red Sea, new engagement from outside powers presents both challenges and opportunities.

The most tangible manifestation of the so-called “new scramble for Africa” has been the proliferation of seaports and military facilities (or the rights to such perches) on the Red Sea coast. Much has been rumored about these acquisitions, though a holistic picture of the real estate bonanza has been lacking. This research report aims to fill that void. Included herein are facts about each site’s development, including stakeholders, contract terms, commercial or military uses, and relevant points of analysis. This report does not represent a comprehensive analysis of changing trans-regional politics, but rather offers a snapshot of the holdings now animating rivalries in the Red Sea.

Research for this report was conducted between October and December 2018. In addition to open source material, information and analysis in this report and the accompanying web interactive were derived from consultations with government officials and non-governmental actors from Ethiopia, Eritrea, Djibouti, Somalia, Somaliland, Sudan, United Arab Emirates, Qatar, Turkey, the United States, the European Union, and the African Union. An accompanying Brookings [web interactive](#), “Red Sea Rivalries,” was published in January 2019 in tandem with a *Foreign Affairs* article entitled “[Red Sea Rivalries: The Gulf States are Playing a Dangerous Game in the Horn of Africa](#).” This report draws directly on those publications.



## THE UNITED ARAB EMIRATES

Driven by commercial potential, regional security interests, and a desire to shape the future of maritime trade, the UAE has been the most assertive of Gulf states to date. In recent years, its engagement in the Red Sea has been further shaped by two events: first, its 2015 entrance into the war in Yemen, a conflict in which it remains a major player; and second, its rivalry with Qatar (and, by extension, Turkey), beginning in 2017.

### *MILITARY BASE AT ASSAB - ERITREA*

**Status:** Following the conclusion of a military cooperation deal reportedly brokered by Saudi Arabia's King Salman, in April 2015,<sup>2</sup> the UAE began using the old port of Assab as a launching point for its military campaign against Houthi forces in Yemen, including air and sea assaults.<sup>3</sup> The construction of a multi-faceted base promptly ensued.

**Terms:** In addition to allowing Saudi and UAE forces to operate inside Eritrea, multiple reports cite an agreement between Eritrea and the UAE on a 30-year basing lease at Assab.<sup>4</sup> Eritrean



government officials vehemently denied the arrangement, however.<sup>5</sup> The compensation package remains undisclosed, though unconfirmed reports cite financial injections and fuel supplies, as well as infrastructure improvements, including at Asmara airport.<sup>6</sup>

**Use:** Assab now hosts a substantial number of Emirati naval, air, and ground assets—including warships, unmanned aerial vehicles (UAVs), fighter jets, helicopters, and armored ground units. It is also able to accommodate large military transport aircrafts through a new channel, docking facilities, barracks, and hangars accompanying the existing runway.<sup>7</sup> Assab has also been used to train and dispatch Yemeni forces as well as troops and mechanized units from neighboring Sudan, who in 2015 were also enlisted by the Saudi-UAE coalition to fight in Yemen.<sup>8</sup>

**Analysis:** Saudi Arabia and the UAE turned to Eritrea only after initial plans to base their anti-Houthi campaign in Djibouti unraveled following a heated diplomatic row and an intensifying dispute over the operation of Djibouti's port container terminal by UAE giant Dubai Ports World (DP World).<sup>9</sup> The war in Yemen thus effectively served to bring a previously isolated Eritrea in from the cold. Experts believe the scale of new military infrastructure at Assab suggests that Abu Dhabi plans to maintain a presence beyond the war in Yemen and may view the site as providing strategic depth vis-a-vis Iran, and as a hub from which to project force across the Red Sea.<sup>10</sup> The Assab port was first used by Italian ships in the 19th century, and later served as a primary naval and trading port for Ethiopia until the advent of war between Ethiopia and Eritrea in 1998. The preliminary rapprochement between Ethiopia and Eritrea, which may yield plans to re-develop a commercial port at Assab, will have implications for Assab's stakeholders and for competing ports in the region.<sup>11</sup>

#### *PORT AND MILITARY BASE AT BERBERA - SOMALILAND*

**Status:** The UAE's DP World was granted a port concession at Berbera in 2016. Prior to October 2018's groundbreaking for Phase I of the Berbera port expansion, preliminary work began on an adjacent UAE military base, albeit amid local opposition, controversy, and reports of illicit payoffs.<sup>12</sup> These deals were part of a seven-point economic and military pact, which also included a major highway, cargo airport, dams, a series of development projects, and security guarantees for Somaliland.<sup>13</sup> Representatives of Somaliland assert the base is to be completed as soon as June 2019, though this remains unconfirmed.<sup>14</sup>

**Stakeholders:** DP World 51 percent | Somaliland 30 percent | Ethiopia 19 percent<sup>15</sup>

**Port Terms:** The deal envisions a \$442 million investment over three phases<sup>16</sup> and a 30-year concession with the option for extension. The Shafa Al Nahda Contracting Company (UAE) was awarded the port bid,<sup>17</sup> which is to include a 400-meter dock, yard expansion, cranes, and a free zone.<sup>18</sup> Work on the port is expected to begin in 2019.<sup>19</sup>

**Military Base:** Divers Marine Contracting (UAE) reportedly began construction of an adjacent military base for \$90 million in 2017; The 16-square mile facility has a 25-year lease and improvements have been made to the site's existing runways. As of December 2018, Somaliland officials acknowledged, however, that work on the naval base had yet to begin.<sup>20</sup>



**Analysis:** The UAE and Somaliland largely ignored angry protests from Somalia’s federal government in Mogadishu, as well as U.N. notifications of arms embargo violation, over port and base deals. Mogadishu says concessions constitute violations of sovereignty, as they cut the federal government out of profits and oversight while giving Somaliland a hook in its decades-old bid for international recognition. Ethiopia stands to gain from the port by diversifying from its near-complete reliance on Djibouti. However, nascent cooperation between the leaders of Ethiopia, Eritrea, and Somalia (as well as likely development of the port at Assab), could slow or otherwise alter initial port plans, as Prime Minister Abiy Ahmed has pledged to respect Somalia’s territorial integrity and work only with its federal government. Somalia’s president, Mohamed Abdullahi Mohamed (aka “Farmajo”), will ask his counterparts to support the demand that Mogadishu oversee the deal—something Hargeisa says it would never accept.<sup>21</sup> Somaliland’s leadership broke with Mogadishu at the onset of the 2017 Gulf crisis, signaling public support for Saudi Arabia and the UAE.

#### *PORT AT BOSASSO - SOMALIA (PUNTLAND)*

**Status:** Somalia’s Puntland region and a UAE ports conglomerate inked an April 2017 deal in Dubai to update and expand a multi-purpose commercial port at Bosasso, a facility first constructed in the 1980s to ship livestock to the Middle East.<sup>22</sup>

**Stakeholders:** The Puntland regional government and P&O ports<sup>23</sup>—a wholly owned subsidiary of the UAE’s DP world.

**Terms:** DP World was awarded a 30-year concession,<sup>24</sup> which includes \$336 million in two phases, with improvements to include port infrastructure, cranes, dredging, and construction of 450-meter quay.<sup>25</sup> Furthermore, communities residing in the expansion area are to be relocated as part of the deal.

**Analysis:** Bosasso further extends the UAE’s strategic footprint in the Horn of Africa; while the UAE has provided security training in Puntland, there appears no interest for now in using Bosasso for Emirati military operations. In reaction to the Berbera and Bosasso port deals, Somalia’s federal parliament also passed a resolution banning DP World from Somalia, citing violations of its sovereignty. Though prompting a public relations headache, DP World and local administrators have largely ignored Mogadishu’s protestations to date. As in Berbera, allegations of corruption surrounded Puntland’s approval of the deal. Puntland’s leadership likewise broke with a neutral Mogadishu during the 2017 Gulf crisis, voicing support for Saudi Arabia and the UAE.<sup>26</sup>

#### *CONTROL OF COASTAL PORTS - YEMEN*

Since its entry into Yemen’s civil war in 2015, the UAE’s military role has been second only to its coalition partner, Saudi Arabia. In addition to the coalition’s controversial naval blockade of the country, part of the UAE’s dictating terms in south Yemen has been via control of the coastline, including a series of port cities and island outposts such as Aden, Mokha, Mukalla, Perim, and Socotra. A battle over control of Yemen’s port city of Hodeidah also remains a central element of the war, despite a 2018 ceasefire agreement.



Unlike port and base deals agreed with African states on the western shores of the Red Sea, the UAE's presence at Yemen's coastal ports comes in the context of the war; it is both less formal and its future role less certain.

In the near term, UAE territorial control is about influencing the war—targeting al-Qaida in the Arabian Peninsula (AQAP), countering Houthi forces, and deterring Iranian influence along its 1200-mile coast. But Abu Dhabi's long-term plans remain unclear, and critics see their expanding presence as tantamount to occupation. It is unlikely that the UAE will relinquish control of these valuable perches when Yemen's war is over without, at a minimum, shaping political and commercial interests on the south coast. When combined with its commercial and military facilities at Assab, Berbera, and Bosasso, and Saudi Arabia's Red Sea port at Jeddah,<sup>27</sup> this constellation of overlapping military and commercial positions gives the UAE a notable edge in controlling seaways, shaping the future of maritime trade in the Red Sea and Western Indian Ocean, and maintaining its own Jebel Ali port in Dubai as a central hub of trans-regional commerce.<sup>28</sup>

### **Perim Island**

After establishing control of Perim in 2016, the UAE began building an airstrip on the small island that sits at the very center of the Bab al Mandab strait. Private satellite imagery showed, however, that construction was halted roughly six months later.<sup>29</sup> The rationale for withdrawal is unclear, though experts believe it may be related to shifting military priorities on the mainland and/or several Houthi missile attacks, which damaged coalition naval vessels in the Bab al Mandab.<sup>30</sup>

### **Socotra Island**

After several years establishing a foothold on the remote island—including renovating its Hawlaf port, providing social services, establishing direct flights to Abu Dhabi, training soldiers, and flying the Emirati flag<sup>31</sup>—UAE forces flexed their muscles in April 2018. Soldiers with newly arrived tanks and armored vehicles asserted control of Socotra's air and seaports, dismissing local administrators.<sup>32</sup> The unexpected move angered locals and the Yemeni government, prompting official complaints and stoking concerns about UAE occupation.<sup>33</sup> Saudi Arabia brokered a solution later that month, in which most UAE forces withdrew and were reportedly to be replaced by Saudi troops, but concerns persist.<sup>34</sup> Turkey drew attention to the unpopular move by expressing public opposition to the UAE's assertion of control.<sup>35</sup> Given its strategic location, its assets, such as a nearly two mile-long airport runway, the challenge of extending Yemeni authority to the island, and the fact that Houthi forces were never present on the island, some see the UAE's attempted Socotra grab as the most telling example of a strategy to monopolize military and commercial control of the entire Gulf of Aden.

### **Aden**

In July 2015, aided by a large-scale amphibious assault, UAE and allied forces captured Aden, Yemen's second city and its de facto capital. Assets deployed in the campaign were launched from the UAE's newly acquired base across the sea in Assab, Eritrea. Once among the world's busiest, Aden's natural port is located just 100 miles from the Bab al Mandab and the mouth of the Red Sea; it was once a centerpiece of the British Empire's commercial and military interests in the region. Today traffic at the multi-faceted cargo port, including container and refinery terminals, is second only to Yemen's Hodeidah port, and the UAE and Saudi Arabia have



pledged to fund improvements. UAE's DP World first secured a long-term concession to develop and operate the Port of Aden in 2008, but contract disputes with the Yemeni government led to termination of the deal in 2012.<sup>36</sup> Emirati interest in Aden continues, however, as port executives have reportedly revisited a potential partnership on several occasions since.<sup>37</sup>

### **Mukalla**

After AQAP established control of the port city of Mukalla in 2015 amid Yemen's unfolding civil war, UAE-backed Yemeni ground forces later ousted AQAP forces in April 2016. Emirati officials—for whom AQAP is arguably the top priority in Yemen—then surged aid to Mukalla, emphasized the restoration of basic services, and focused on revitalizing the local economy. This included boosting volume at Mukalla's modest-sized port—the main seaport in Yemen's largest governate of Hadhramaut.<sup>38</sup>

### **Shihr**

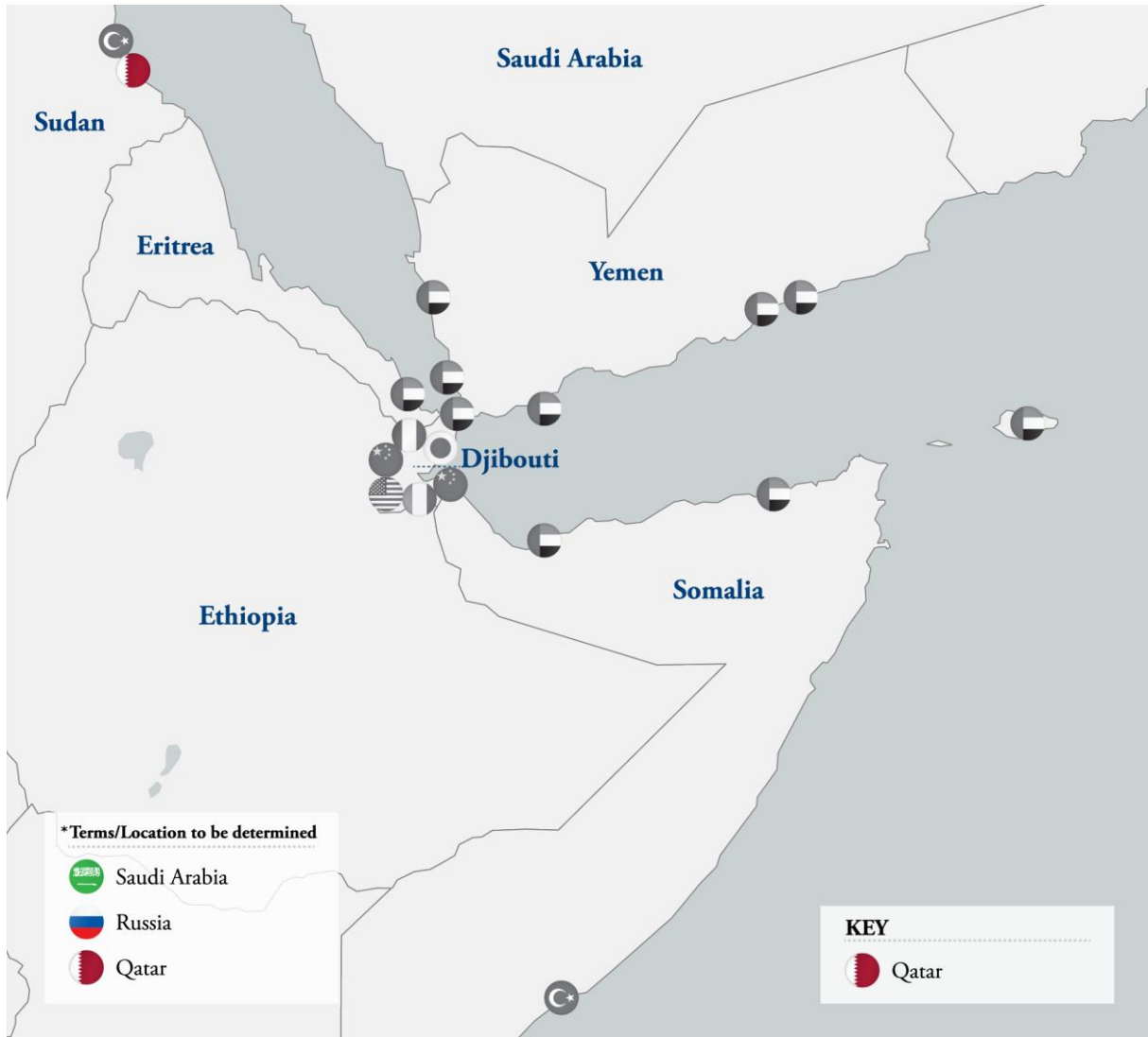
Likewise controlled by AQAP and re-taken in the same April 2016 campaign, Shihr houses an oil-export terminal that was reportedly closed in the spring of 2015.<sup>39</sup> The port terminal came back online when oil and gas exports resumed in August 2016 and is now controlled by UAE forces.<sup>40</sup>

### **Mokha**

The small port city of al-Mokha is situated directly on the Bab al Mandab, the narrowest point between the Arabian Peninsula and Africa and the gateway to the Red Sea. It was held by Houthi forces from early 2015 until February 2017 when Yemeni forces backed by UAE ground and air power re-captured the city. Now heavily fortified by UAE naval assets, Mokha acts as a forward maritime base from which the UAE patrols the shipping lane and denies the Houthis a supply route.<sup>41</sup> The seizure of al-Mokha paved the way for the UAE and coalition forces to advance on the country's main port city of Hodeidah, some 110 miles to the North.

### **Hodeidah**

A major strategic battleground in the war for control of Yemen, Saudi and UAE forces mounted a second offensive against Houthi forces at the port city of Hodeidah in September 2018.<sup>42</sup> The multi-purpose port at Hodeidah is the country's busiest and the primary source of commercial imports and humanitarian aid into Yemen. But according to Saudi Arabia and the UAE, it is also a source of Houthi arms supplies from Iran, and it has been closed on several occasions during the civil war. In November 2018, as some 14 million citizens faced famine, U.N. Envoy Martin Griffiths called for the UN to assume an oversight role of port operations; control of Hodeidah became a major sticking point in peace talks that began in December 2018. A ceasefire deal was signed shortly thereafter, though control of the port remains contested as fighting has broken out on several occasions in 2019.



## QATAR

The ongoing Gulf crisis has likewise catalyzed new Qatari activity and underscored Doha's desire to solidify partnerships in the Horn of Africa. For example, despite the UAE's experience and comparative advantage, Qatar has also attempted to enter the port development game. Planned projects in Sudan and Somalia would represent Doha's first foray into overseas port developments. The collapse of Sudan's ruling regime in April 2019 could jeopardize existing contracts, however, and Doha's future relationship with Khartoum will depend on the character of the transitional government that emerges.

### *PLANNED PORT AT SUAKIN - SUDAN*

**Status:** Doha and Khartoum penned a deal in the Spring of 2018 to develop what Qatari officials call "the largest container port on the Red Sea." Phase 1 (\$500 million) is to be completed by 2020. Work on the port reportedly began in April 2018, and Qatar's port authority delivered the first cranes and infrastructure,<sup>43</sup> but little has happened since.





**Stakeholders:** Sudan 51 percent | Qatar 49 percent

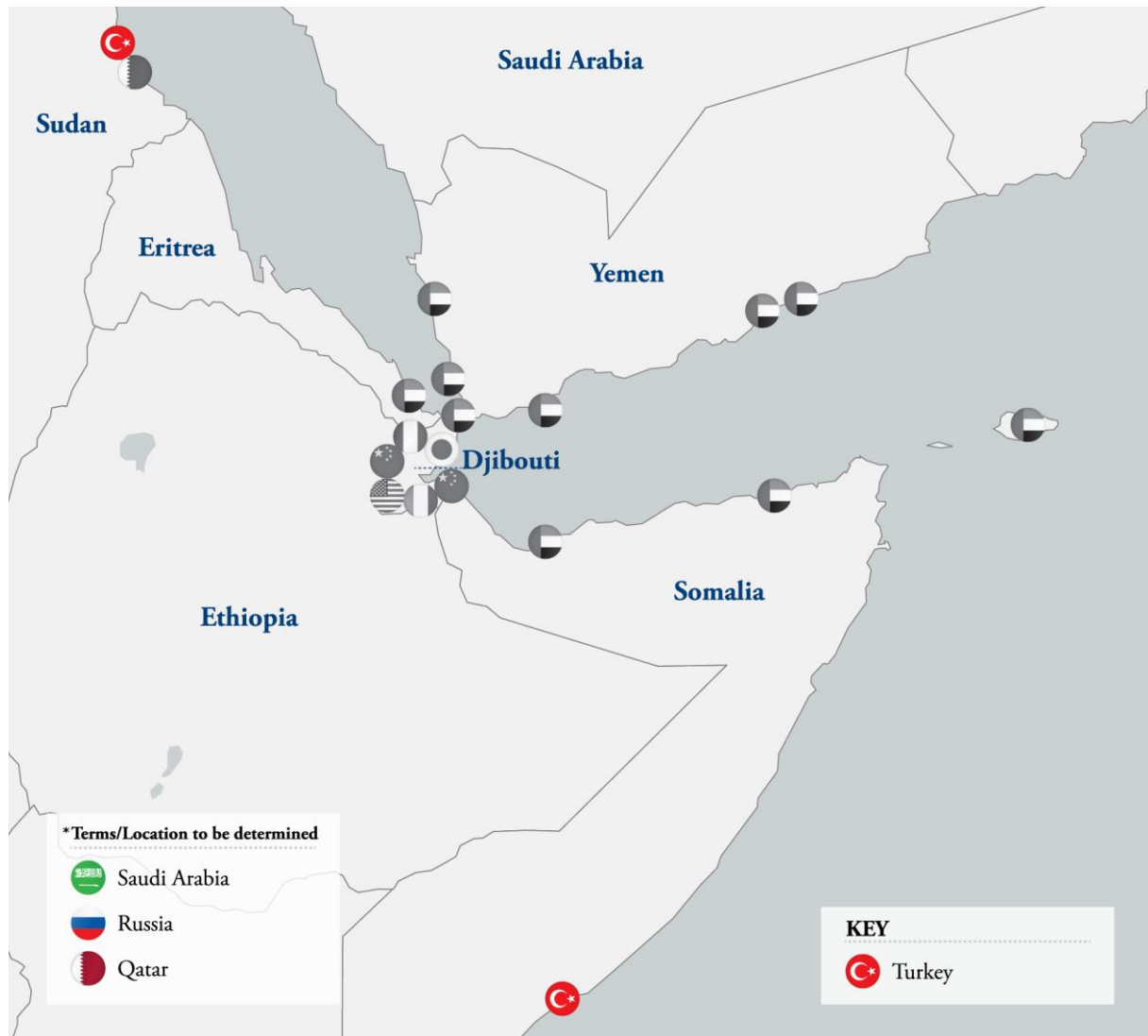
**Terms:** \$4 billion | To be managed by Qatar Ports Management Company (Mwani Qatar)<sup>44</sup>

**Use:** In addition to container traffic, plans for the multi-purpose development include an economic free zone and a new ferry from Suakin across the Red Sea to Jeddah.

**Analysis:** The deal would be Doha's first foray into international port development. Many see Suakin as Qatar's counter to rival UAE port acquisition on the Red Sea, and an attempt to fortify ties with regional neighbors following the Arab Quartet (Saudi Arabia, UAE, Egypt, Bahrain) blockade. Sudan has signed Suakin deals with both Qatar and Turkey, and while officials hint at a joint development, the relationship between the two projects is not yet clear. Both announcements have stirred anger among regional rivals, most notably in neighboring Egypt, where officials are wary of military cooperation between Turkey, Sudan, and Qatar. So far, public announcements about the Suakin deal have outpaced any progress on the ground.

*\*PLANNED PORT DEVELOPMENT AT HOBYO - SOMALIA*

In December 2018, Qatar and Somalia signed a series of new cooperation agreements, including on port development. Some reports indicate that this will include reconstruction of a port at Somali coastal city Hobyo, some 300 miles northeast of Mogadishu. Details of these recent arrangements are yet to be finalized or disclosed, however.<sup>45</sup>



## TURKEY

Turkey, too, has been active in the Horn and, in some cases, its engagement pre-dates recent Gulf interest and acquisitions. Having solidified an alliance with Qatar during the 2017 Gulf crisis, Turkey has also become a protagonist in the ongoing feud and, by extension, its manifestations in the Horn. Egypt and Saudi Arabia have expressed alarm over what they see as President Recep Tayyip Erdoğan's attempts to assert greater Turkish economic and military influence on their borders—a claim dismissed by Turkish officials.<sup>46</sup>

### *PLANNED PORT REHABILITATION AT SUAKIN - SUDAN*

**Status:** In December 2017, Erdoğan and (now former) Sudanese President Omar Bashir agreed that Turkey would redevelop the historic, but now defunct, Ottoman port city and shipyard, though the potential uses for the twelve-mile long island remain the subject of rivals' interest. However, the April 2019 collapse of Sudan's regime puts all such cooperation agreements in



doubt, as political and economic relationships may evolve in light of new governance arrangements in Khartoum.

**Terms:** This deal was part of a larger cooperation package totaling \$650 million with a 99-year concession lease, and includes the island being connected to mainland by causeway.

**Use:** Though President Erdoğan and his Sudanese counterpart emphasized the cultural heritage and tourism potential of the island, including as a possible gateway for Hajj pilgrims, plans to build a docking facility for military and civilian vessels were also acknowledged, as was the possibility of broader military cooperation.<sup>47</sup> The agreements also included a presence for Turkish forces at Port Sudan, who are ostensibly to train Sudanese forces in counterterrorism activities. In terms of commercial relevance, Suakin lies just 35 miles down the coast from Port Sudan, a modern port, which long ago rendered Suakin obsolete.

**Analysis:** Officials in Egypt and Saudi Arabia—already at odds with Turkey over the Gulf crisis—were alarmed by the deal, its potential military implications, and perceived attempts by Erdoğan to assert greater Turkish influence on their borders. Turkish officials, meanwhile, dismiss allegations of “neo-Ottomanism,” and Sudanese officials denied any interest in joining a Turkey/Qatar axis or in choosing sides in the Gulf crisis.<sup>48</sup> In the long run, the Suakin outpost could theoretically be used as a staging point for Turkish or allied military assets. But at present, those fears seem overstated. Given its relatively small size, capacity at Suakin will ultimately be limited. Moreover, there are no indications of planned military presence at Suakin and, given Turkish financial woes, that is unlikely to change in the near term.<sup>49</sup> In the wake of Bashir’s demise, Cairo, Riyadh, and Abu Dhabi nonetheless moved quickly to try to shape the new political dispensation in Sudan and curtail the influence of Turkey and Qatar.

#### *TRAINING FACILITY AND PORTS MANAGEMENT AT MOGADISHU - SOMALIA*

**Status:** Turkey opened a one and a half square miles military training facility in Mogadishu in September 2017 to train Somali military recruits. Meanwhile, Turkey’s Albayrak Group<sup>50</sup> secured control of operational rights at the Port of Mogadishu in 2014, an award subject to some controversy, while another Turkish venture, Favori LLC (Kozuva Group),<sup>51</sup> operates the city’s airport.

**Training Facility Terms:** Construction of the facility cost \$50 million.<sup>52</sup>

**Stakeholders:** Somali government 55 percent | Albayrak Group 45 percent

**Port Terms:** 20-year lease | Substantial upgrades to the comparatively rudimentary port facilities began in 2015.

**Analysis:** Turkey’s training facility—its largest such overseas investment—and its operation of Mogadishu’s air and seaports build on the back of increased humanitarian, political, and aid investments in Somalia since 2011. Though no Turkish military assets are hosted at the training facility, and the site is reportedly home to just 200 Turkish officers, rivals see Ankara’s unparalleled presence in Mogadishu as evidence of strategic expansion in the region. When questioned about their increasing military footprint on the Red Sea, UAE officials point to



Turkey's facility in Mogadishu to justify their own expansion.<sup>53</sup> Though traffic has increased, the Port of Mogadishu is comparatively modest in terms of volume; nonetheless UAE's DP World also reportedly showed interest in the port prior to its 2014 award.

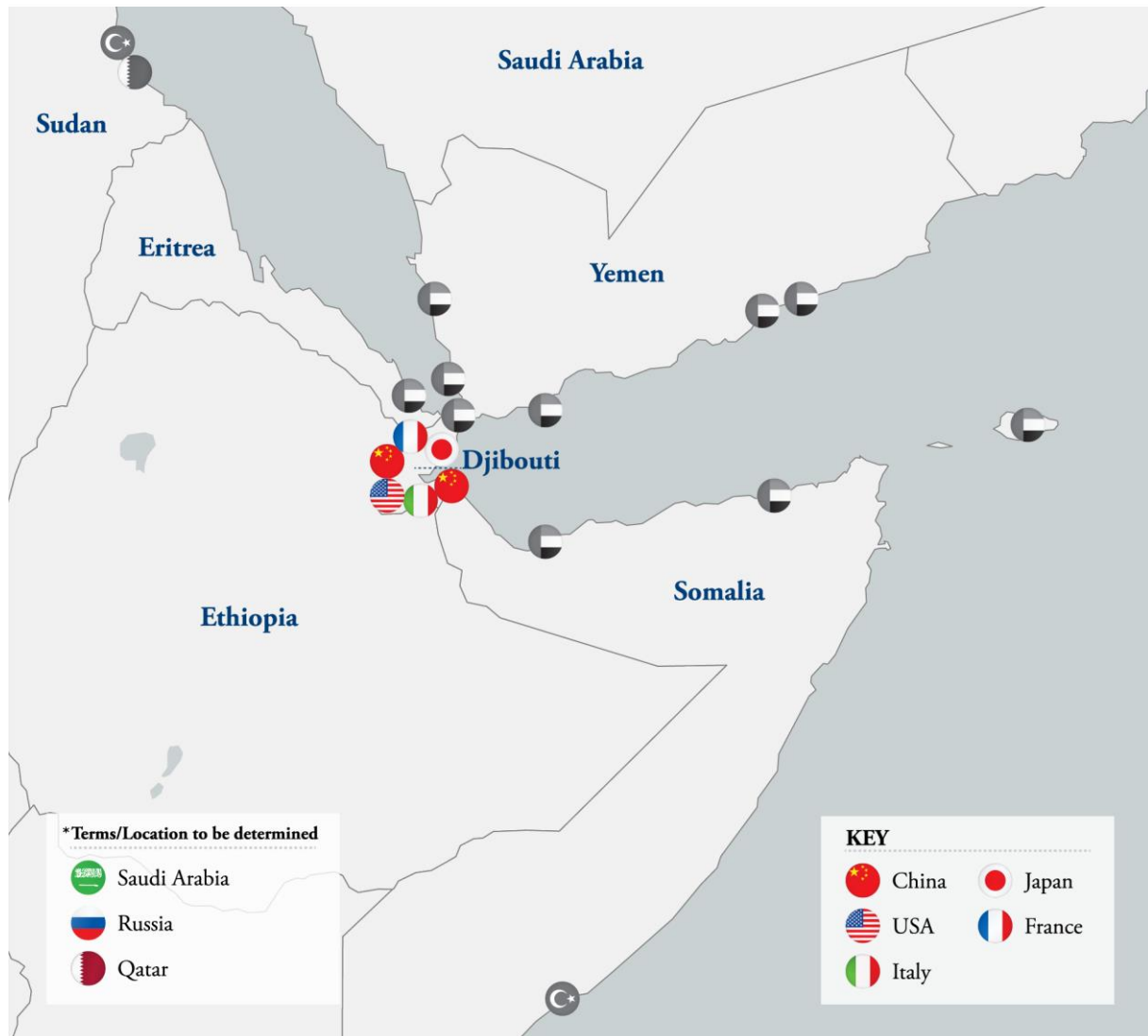
## SAUDI ARABIA

Saudi Arabia has cooperated with the UAE in the Red Sea, particularly with regard to prosecution of the war in Yemen and the establishment of a military base in Eritrea. Riyadh's engagement in the Horn has been comparatively inconsistent, however, due in part to emerging domestic challenges and international opprobrium on several fronts. Nonetheless, Riyadh made the first attempt to establish a multilateral forum of Red Sea states in December 2018.<sup>54</sup>

*\*SAUDI ARABIA: PROPOSED MILITARY BASE - DJIBOUTI (Location TBD)*

**Status:** After years of dialogue, media reports suggested an agreement to host a Saudi military facility in Djibouti had been finalized; however, Djiboutian officials and other local sources report that, while talks with Riyadh are ongoing, no site has been identified nor terms agreed.<sup>55</sup>

**Analysis:** Amid changing regional politics, and with the status of Saudi-Djibouti relations in flux, it is not clear whether such a facility will in fact materialize. Moreover, the crowded field means space near Lemonnier and the existing group of military facilities in Djibouti City is limited. Djiboutian officials have thus urged Saudi Arabia and others to consider sites at Obock, a small port city across the Gulf of Tadjoura to the north; the Chinese reportedly showed initial interest in Obock before joining the others already in Djibouti City. Obock's proximity to the Bab el Mandab makes it a potentially even more valuable site, though its existing facilities are rudimentary and considerable investment would be required to realize this potential.<sup>56</sup>



## CHINA, THE UNITED STATES, AND INTERNATIONAL PLAYERS

### CHINESE NAVAL MILITARY BASE - DJIBOUTI

**Status:** The Chinese People’s Liberation Army (PLA) Support Base opened in Djibouti City in August 2017. The 90-acre naval facility sits adjacent to Doraleh Multi-Purpose Port, a new facility operated and financed in part by a Chinese state-owned conglomerate.

**Stakeholders:** Djibouti and China’s PLA Navy

**Terms:** \$590 million investment; 25-year agreement | 10-year lease for \$20 million a year<sup>57</sup>

**Analysis:** This is China’s first-ever overseas military base, located just six miles from the United States’ only military base in Africa. Japanese and U.S. officials expressed both surprise and dismay over the deal in 2016<sup>58</sup> and have since registered official complaints about Chinese activities such as allegedly directing military-grade lasers at U.S. pilots.<sup>59</sup> Analysts also see the



two facilities as evidence of the integration of Chinese military and commercial interests, as the base could host Chinese expeditionary forces mandated to protect growing economic interests in the region.<sup>60</sup> Estimates for planned Chinese deployments range from several hundred to as many as 10,000. Amid all the attention, Chinese officials have repeatedly sought to downplay the strategic implications of their new “support facility,” emphasizing its support for China’s U.N. peacekeepers and anti-piracy efforts.

### *CHINESE PORTS - DJIBOUTI*

**Status:** Following a 2015 deal, China opened Doraleh Multi-Purpose Port in May 2018, which sits adjacent to its new naval base and has increased trade capacity at Djibouti’s ports. China also acquired a minority stake in the Djibouti Port Authority itself in 2013, the assets of which include Doraleh Multi-Purpose Port, the Port of Djibouti, and the Doraleh Container Terminal. The latter is subject to an ongoing legal dispute between the Djiboutian Government and long-time operator DP World. China also financed construction of a free trade zone and a new standard gauge railway to transport cargo from Djibouti to Ethiopia’s capital of Addis Ababa; the railway was inaugurated in January 2018, and daily volume is now increasing after early operational challenges.<sup>61</sup>

#### **Terms:**

- Doraleh Multi-Purpose Port: Jointly financed by China Merchants Holding<sup>62</sup> and the Djibouti Ports Authority<sup>63</sup>
- Port Authority (PDSA): Djibouti 76.5 percent | China Merchants Holdings Company 23.5 percent<sup>64</sup>
- The Doraleh Container Terminal (DCT) Jointly owned by Djibouti’s Port Authority (67 percent) and DP World (33 percent) since 2000, the Djiboutian government terminated DP World’s contract in February 2018.<sup>65</sup> (An April 2019 ruling from the London Court of Arbitration ordered Djibouti to pay DP World \$533 million for breach of contract.)

**Analysis:** A 2014 legal dispute over port operations and an increasingly testy relationship between the UAE and Djibouti led the government to seize the terminal in 2018 and terminate DP World’s 30-year contract. The disagreement included allegations that DP World was intentionally limiting expansion of port capabilities, so as to prevent competition with its own Jebel Ali port in Dubai. Despite ongoing legal battles, and rulings in the company’s favor by the London Court, reports surfaced suggesting Djibouti awarded operational control of the port to its Chinese Merchants Group. Djiboutian officials dismiss these reports as propaganda, arguing the gap has been filled by Djibouti alone.<sup>66</sup> DP World has also filed suit against China Merchants Holdings, claiming it unlawfully induced Djibouti’s breach of contract.<sup>67</sup> Two U.S. Senators, Marco Rubio (R-FL) and Chris Coons (D-DE), as well as the United States’ top military commander in Africa, General Thomas Waldhauser, expressed public concern in 2018 about China’s potential control of the port and associated national security implications.<sup>68</sup> (Waldhauser later testified that throughput at Doraleh Container Terminal for U.S. logistics and material was not impacted, and American officials later affirmed that such allegations were unfounded. Djiboutian and Western officials assert that the UAE was behind the effort to raise alarm about China).<sup>69</sup> U.S. National Security Advisor John Bolton echoed specific concerns about Djibouti during his announcement of the Trump Administration’s new Africa strategy in late 2018.<sup>70</sup>



### *UNITED STATES MILITARY BASE LEMONNIER - DJIBOUTI*

**Status:** The United States leased the former French Foreign Legion base from Djibouti in 2001 following the attacks of September 11, 2001. A Combined Joint Task Force-Horn of Africa was established and deployed to the renovated base in 2003, and expansions followed.<sup>71</sup> \$1.4 billion was earmarked in 2012 for planned upgrades, including a new headquarters, barracks, hangars, and airfield improvements.<sup>72</sup> The base is now controlled by AFRICOM, and it is the only U.S. military base in Africa.

**Terms:** The United States renewed a twenty-year lease in 2014 for \$63 million annually.<sup>73</sup> Now expanded to 590 acres,<sup>74</sup> the arrangement includes use of adjacent Djibouti airport and port facilities.<sup>75</sup>

**Use:** The base houses more than 4000 U.S. personnel.<sup>76</sup> Its primary focus is counterterrorism activities in the Horn of Africa and Yemen, including special forces operations and one of the U.S. government's most active UAV programs. A second, and unacknowledged, military facility was opened at Chabelley Airfield in 2013 to conduct drone operations following traffic incidents at Djibouti's Ambouli airport.<sup>77</sup>

**Analysis:** Since its opening, Lemonnier has transitioned from an expeditionary facility to a more permanent base. While U.S. forces have long operated in proximity to French and other Western allies, U.S. political leaders and military officials have become increasingly concerned about China's new presence in Djibouti and are reportedly considering adjustments to its wider military posture and operations in the region.<sup>78</sup> Djiboutian officials, meanwhile, have repeatedly sought to assuage U.S. concerns, arguing there is room enough for everyone.<sup>79</sup>

### *FRANCE: MILITARY BASE AERIENNE 188 - DJIBOUTI*

**Status:** First established in 1946, the French base remained by agreement after Djibouti gained independence in 1977. The Air Base 188 became a joint support base in 2000,<sup>80</sup> and is co-located with the U.S Camp Lemonnier and others near Ambouli International Airport. The base is home to 1,450 troops, and it remains one of the largest overseas French bases.<sup>81</sup> It is one of several areas where French forces are stationed in Djibouti.<sup>82</sup> Other French outposts have also hosted other European troops partnering in anti-piracy efforts.

**Terms:** 10-year base lease and defense treaty renewed in 2011 for 30 million euros per year.<sup>83</sup>

**Use:** The purpose of the base is the protection of French nationals and a wider area of security responsibility extending from Yemen to Kenya.<sup>84</sup> The air base is the only overseas French base that houses a permanent fighter squadron, as well as a transport aircraft and helicopters.

**Analysis:** The French presence in Djibouti pre-dates all others, and Paris has recently sought to emphasize its cooperation with Djibouti, including a March 2019 visit from President Emmanuel Macron—but France's relative importance has waned given the more recent arrival of bigger players, as well as its greater focus on West Africa and the Sahel.



### *ITALY: MILITARY SUPPORT BASE - DJIBOUTI*

**Status:** Located south of Djibouti City, the Italian military facility was established in 2013 and is the smallest of NATO country facilities.

**Terms:** Reportedly \$2.6 million annually<sup>85</sup>

**Use:** The support base can house up to 300 personnel as well as a UAV contingent.

**Analysis:** In addition to providing logistical and surveillance support to Italian warships and wider EU anti-piracy efforts in the Gulf of Aden and Indian Ocean, the modest Italian contingent focuses primarily on small-scale humanitarian and development projects for local communities.

### *JAPANESE MILITARY BASE - DJIBOUTI*

**Status:** The thirty-acre facility adjacent to Djibouti airport and Camp Lemonnier (United States) was opened in 2011; Tokyo reportedly agreed to lease seven additional acres in 2017,<sup>86</sup> and further upgrades are planned to enable a wider range of operational missions.<sup>87</sup>

**Terms:** As of 2015, Japan had spent \$40.1 million on construction work at the base.

**Use:** The base houses 600 personnel,<sup>88</sup> and is operated by Japan Maritime Self-Defense Forces, which have participated in multi-national maritime efforts to combat piracy in the Gulf of Aden and the Somali coast;<sup>89</sup> it also provides transport, logistical supply, and medical services.<sup>90</sup>

**Analysis:** Japanese assets first arrived in Djibouti in 2009 as part of global anti-piracy efforts, operating as a sub-tenant at Camp Lemonnier before establishing their own base, their first overseas, in 2011. Planned improvements signal a more permanent presence, possibly in response to expanding Chinese footprint in Djibouti.<sup>91</sup> Japan and India have also discussed an arrangement that would allow for co-location of Indian assets at the base in Djibouti, and reciprocal arrangements elsewhere, until such time that India could establish its own facility.<sup>92</sup>

*\*PROPOSED RUSSIAN LOGISTICS FACILITY- ERITREA*





**Status:** Russian and Eritrean officials agreed in September 2018 to establish a Russian logistics base at one of Eritrea’s ports, though the scope, location, and terms of the proposed arrangement were not disclosed.

**Analysis:** This development comes just before long-standing U.N. sanctions on Eritrea were lifted in November 2018, and after Moscow’s earlier attempt to join the club of foreign militaries in Djibouti was rebuffed. Russia’s Foreign Minister Sergey Lavrov also signaled intent to partner in developing infrastructure, regional transportation corridors, and cross-border pipelines.<sup>93</sup>

## CONCLUSION

African states on the Red Sea coast must find a way to harness this surge of new investment without surrendering their sovereignty or being drawn into political rivalries that offer little reward. They should further recently established regional dialogues to develop a shared vision for deepening relations with the Gulf, including articulation of a common development agenda. Gulf states, in turn, should move beyond paycheck diplomacy, and recognize that their long-term interests will be best served by developing a nuanced analysis of, and posture toward, domestic politics in the Horn. They should refrain from exporting the Gulf crisis to this region, while making their engagement with African partners deeper and wider—including investing not just in individuals but in public and private institutions. Together, the political, economic, and security interests in this emerging arena might be served by the establishment of a “Red Sea Forum,” where concerned states would come together to discuss common concerns, identify emergent threats, and fashion common solutions.<sup>94</sup> Finally, the United States and China, each with a military presence and interests in the region, should aim to achieve some kind of equilibrium as the Red Sea emerges as a potential theater for great power competition, while at the same time using their respective influence to urge Gulf states to resolve the ongoing Gulf Arab crisis.

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