My presentation will address:

1. Salient Features of the Horn of Africa
2. Present State of Play in the States of the Region
3. Potential Flashpoints in the Region
4. Eritrea-Ethiopia Relations: a Factor of Stability or Instability
5. Prospects for Regional Cooperation and Integration
## 1. Salient Features of the HoA

### Estimated Populations (2019)*

<table>
<thead>
<tr>
<th>Country</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Djibouti</td>
<td>0.97 million</td>
</tr>
<tr>
<td>Eritrea</td>
<td>3.4 million</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>112 million</td>
</tr>
<tr>
<td>Kenya</td>
<td>52.5 million</td>
</tr>
<tr>
<td>Somalia</td>
<td>15.4 million</td>
</tr>
<tr>
<td>South Sudan</td>
<td>11 million</td>
</tr>
<tr>
<td>Sudan</td>
<td>42.8 million</td>
</tr>
<tr>
<td>Uganda</td>
<td>44.2 million</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>282.2 million</strong></td>
</tr>
</tbody>
</table>

**HoA Coastline is approx. 4800km long**

- Somalia 3,333 km
- Eritrea 1,151 km (of Red Sea coastline)
- Djibouti 314 km

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* Source: United Nations Population Division, Department of Economic and Social Affairs. World Population Prospects 2019

** Sources: UN Environment Programme and CIA World Factbook
2. Present State of Play in the States of the Region

2.1 Horn of Africa (Proper): Weak and Fragile States

Eritrea
- Political, economic and societal paralysis
- Precarious peace with Ethiopia
- Regional and international isolation, despite the formal lifting of sanctions

Ethiopia
- Unstable domestic situation and inter-ethnic strife
- Weak Federal Government lacking authority over its entire national territory
- Unfinished peace with Eritrea & tensions with Egypt over Nile waters (GRD)

Somalia
- Weak Federal Government lacking authority over its entire national territory
- Regional military presence and rivalry for hegemony: risk of fragmentation

Djibouti
- Precarious internal situation
- Military & naval base of major world powers
2.2 Greater Horn of Africa

Kenya – Relatively stable and prosperous: regional economic powerhouse

South Sudan – Wracked by civil war and internecine conflict
  – 2018 Revitalised Agreement unravelling

The Sudan – Heroic popular struggle produced a new Transitional Government
  – Hopeful prospects, serious challenges to building democratic governance

Uganda – Relatively stable and prosperous
  – Precarious internal situation in the run-up to 2021 elections

2.3 Institutions

Intergovernmental Authority on Development (IGAD)
  – Weak and ineffective as a forum of regional cooperation and integration
  – Vulnerable to instrumentalisation by bigger member states

African Union – Essentially a talk shop: poor track record defending/advancing African interests
3. Potential Flashpoints in the Region

- **Horn of Africa**
  - Weak, fragile and impoverished states with a history of wars & conflict, large population displacements and irregular migration

- **Eritrea-Ethiopia Rapprochement**
  - Underlying issues of conflict remain unresolved
  - Settlement of boundary question still pending
  - Ethiopian army and settlements on sovereign Eritrean territory
  - No Institutionalisation of state-to-state relations: customs, immigration, trade, etc.

- **Horn of Africa Conflict Matrix**
  - Interstate conflicts: Eritrea-Ethiopia, Eritrea-Djibouti
  - Intrastate conflicts: inter-ethnic territorial and boundary disputes
3. Potential Flashpoints in the Region

- Arabian Peninsula spill-over effects: Shia-Sunni divide, Saudi-Iran rivalry, Yemen War
- Major Power Projections: Proliferation of military & naval bases on both sides of Red Sea
- China: (1) growing presence in HoA, (b) Sino-American Rivalry, (c) Belt and Road Initiative
- Large & growing youth population, mass youth unemployment
- Environmental degradation:
  (a) Climate change: irregular rain patterns, drought, pests affecting food and water security
  (b) Pollution: air, water, land resources;
  (c) Unsustainable exploitation of natural resources
- Competition for water and grazing lands
  - Regional: Upper vs. Lower Riparian States for Nile waters
  - Neighbouring nomadic communities
- Interstate and intrastate conflicts
- Destabilising impact of large population movements/displacements
4. Reconciled Eritrea-Ethiopia Relations: A Factor of Stability

**Essential conditions for durable peace between Eritrea and Ethiopia**

1. A viable resolution of the boundary issue in line with the African policy and practice
2. Reciprocal respect for sovereignty and territorial integrity
3. Institutionalised, rules-based *State-to-State* relations
4. Stable, inclusive democratic governance in both States
5. Possible areas of cooperation include trade, security, environment, tourism
6. Stable democratic Ethiopia & Eritrea: a factor for regional cooperation & Integration
5. Prospects for Regional Cooperation & Integration

• Normalisation of bilateral and multilateral relations among countries in the HoA crucial for:
  - *peace, security, stability and development*.

• Foundation for co-prosperity based on closer political cooperation and economic integration.
  - Large markets (HoA and the Continental Free Trade Area (CFTA))
  - Economies of scale, specialisation based on comparative advantage

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**TABLE 9 Intraregional trade in East Africa, 2012–17 (% of total exports)**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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<tbody>
<tr>
<td>Burundi</td>
<td>8.9</td>
<td>8.3</td>
<td>9.5</td>
<td>10.2</td>
<td>9.8</td>
<td>6.6</td>
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<td>Comoros</td>
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<td>0.1</td>
<td>0.4</td>
<td>0.1</td>
<td>0.1</td>
<td>0.7</td>
</tr>
<tr>
<td>Djibouti</td>
<td>39.3</td>
<td>34.9</td>
<td>38.1</td>
<td>38.3</td>
<td>39.4</td>
<td>38.8</td>
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<tr>
<td>Eritrea</td>
<td>1.1</td>
<td>1.1</td>
<td>1.2</td>
<td>1.3</td>
<td>1.0</td>
<td>0.7</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>16.1</td>
<td>25.6</td>
<td>21.9</td>
<td>21.2</td>
<td>20.7</td>
<td>21.0</td>
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<tr>
<td>Kenya</td>
<td>33.9</td>
<td>25.8</td>
<td>27.1</td>
<td>28.6</td>
<td>29.9</td>
<td>25.1</td>
</tr>
<tr>
<td>Rwanda</td>
<td>36.8</td>
<td>41.3</td>
<td>29.3</td>
<td>13.6</td>
<td>15.2</td>
<td>14.3</td>
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<tr>
<td>Seychelles</td>
<td>0.5</td>
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<td>0.1</td>
<td>0.4</td>
<td>0.1</td>
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<tr>
<td>Somalia</td>
<td>0.1</td>
<td>0.5</td>
<td>0.0</td>
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<td>0.6</td>
</tr>
<tr>
<td>Sudan</td>
<td>2.6</td>
<td>2.2</td>
<td>2.3</td>
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<td>Tunisia</td>
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<td>7.9</td>
<td>10.1</td>
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<td>Uganda</td>
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<td>15.5</td>
<td>17.8</td>
<td>17.6</td>
<td>16.6</td>
</tr>
</tbody>
</table>

*Note: South Sudan had no exports to East African countries, but its imports from other East African countries are included as intraregional trade in those countries’ totals.*

The HoA and the Arabian Peninsula straddle one of the busiest maritime trading routes in the world.

Opportunity to create a lucrative market of maritime trade, service hubs and strategic access ports.

**4.8 million barrels per day of oil pass through the Bab el-Mandab strait**

*Source: US Energy Information Administration, International Tanker Owners Pollution Federation; Reuters*
5. Prospects... (continued)

**Tourism:** unique biodiversity, history & culture, pristine maritime & terrestrial environments.

**Opportunity:** An untapped potential for eco- and sustainable tourism

**Security:** Proliferation of military bases on both sides of the Red Sea Basin.

**Opportunity:** Financial gain, infrastructure development

**Risk:** Dependency, getting drawn into regional or international conflicts
The States and peoples of the HoA have more that brings them together than sets them apart.

*Peace, stability, security, and cooperation are regionally indivisible and vital for economic development & prosperity*

Thank You!

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