

# The Abraham Accords: The Force Re-shaping the Gulf– Red-Sea– Horn [(Ethiopia (*Eritrea*))\*] Energy & Geopolitical Architecture (Part 1/4: Structural Order under NATO Crisis)

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## Preface: Sovereignty, Development, Democratic Unity and Generational Transition

In a recent article “*The Spirit of Adwa Must Carry Ethiopia Through GERD and the Red Sea*” [1], I argued that Ethiopia stands at a decisive historical juncture in which sovereignty, development, democratic legitimacy, and generational transition must be pursued simultaneously rather than sequentially. The article framed GERD and the question of the Red Sea access as existential components of national strategy, while identifying internal fragmentation and demographic imbalance as the principal structural vulnerabilities.

More importantly, the article situated Ethiopia’s current moment within a long historical continuum anchored in the legacy of Adwa, reframed not as a symbolic memory but as an operational doctrine. In this formulation, sovereignty is not merely a legal status but an actively maintained condition, requiring institutional strength, strategic coherence, and national unity. The GERD is presented as the modern embodiment of this doctrine: a project financed domestically, constructed under external pressure, and functioning simultaneously as infrastructure, economic catalyst, and civic contract. Its significance lies not only in its capacity to transform Ethiopia’s energy landscape but also in the political ownership it generates across diverse social groups, thereby making externally imposed concessions structurally difficult.

Parallel to GERD, the article advanced a forceful argument that Ethiopia’s lack of sovereign access to the Red Sea constitutes a historically engineered and strategically unsustainable condition. The loss of maritime access is framed not as an incidental outcome of Eritrean independence but as the product of deliberate geopolitical processes that have left Ethiopia economically burdened and strategically exposed. Continued dependence on a single transit corridor is described as imposing both measurable economic costs and latent coercive vulnerability. While the article prioritised peaceful negotiation as the preferred pathway to restoring access, it insisted that the underlying right is sovereign in nature and not contingent upon external recognition. A central an-

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analytical thread was also concerning Ethiopia's demographic structure. With a substantial majority (more than 68%) of the population under thirty, the article identified a structural misalignment between a youthful, technologically aware society and a political system - be it in power or in opposition, dominated by older generations. This imbalance is presented as a latent source of instability, particularly if the younger generation remains excluded from meaningful participation in governance and institutional design. The argument extends beyond representation, positing that the long-term viability of Ethiopia's strategic choices—on GERD, maritime access, and economic transformation—will ultimately depend on the generation that will live longest with their consequences.

Some tried to pigeonhole me as nothing but a champion of Abiy Ahmed. But, the article's treatment of the Prime Minister was deliberately dual in character. On one hand, he is portrayed as a transformational figure associated with major national achievements, including the completion of GERD, the pursuit of infrastructure-led development, and a strategic reorientation of the state toward technological and economic ambition. On the other hand, he is depicted as one of the most contested leaders in Ethiopia's modern history, presiding over significant internal conflicts, documented human rights concerns, and a perceived regression in democratic practices. The article explicitly rejects extreme characterisations of the Prime Minister while acknowledging that these criticisms carry analytical weight, particularly in relation to state legitimacy. However, only those who have political ambition but not an ounce of national interest will label Abiy with a blanket of cynicism, derogation and brutality. The truth is inbetween and we all need to contribute to help in guiding the existing political fireball towards a peaceful and pragmatic, not an end, but enduring solution.

Economically, the article framed Ethiopia not as a failing system but as a state undergoing a high-risk structural transition. It highlighted strong macroeconomic indicators, including growth projections and export performance, alongside serious internal weaknesses such as declining investment in education, inflationary pressures, and concerns over property rights and governance. A key conceptual contribution is the defence of infrastructure-led development, particularly urbanisation, as a necessary precondition for industrialisation rather than a misallocation of resources. GERD is positioned within this framework as the enabling infrastructure for a broader urban and industrial transformation.

Throughout, the article emphasised that Ethiopia's external position is inseparable from its internal condition. A state facing unresolved legitimacy disputes, ethnic fragmentation, and governance challenges is inherently more vulnerable to external pressure, particularly in negotiations involving strategic assets such as GERD or maritime access. Sovereignty, in this sense, is not defended solely through diplomatic assertion but through the credibility and cohesion of the state itself - politically, diplomatically, economically and militarily.

The article implied a nuanced assessment of Abiy Ahmed's role in Ethiopia's future. In the short to medium term, he is strategically important insofar as he embodies the continuity of the current national trajectory, particularly with respect to GERD, infrastructure development, and the assertion of sovereign interests - particularly Ethiopia's historical maritime access and ownership. His leadership provides a focal point through which these policies are articulated and pursued, and abrupt discontinuity could weaken both domestic coherence and external negotiating strength.

However, the article is equally clear that Abiy is not sufficient as a guarantor of Ethiopia's long-

term future. The persistence of internal conflict, questions surrounding democratic legitimacy, and the centralisation of political authority limit the sustainability of the current trajectory. These factors introduce structural vulnerabilities that cannot be resolved through leadership alone. In particular, the exclusion or marginalisation of the younger generation represents a long-term risk that extends beyond any individual administration. The decisive issue, therefore, is not the presence or absence of Abiy Ahmed as a political figure, but whether the strategic direction associated with his leadership can be institutionalised, corrected, and broadened. A scenario in which development continues alongside genuine democratic reform and conflict resolution offers a plausible pathway to stability and growth. Conversely, the continuation of current policies without substantive institutional reform risks stagnation and increased vulnerability. The abrupt removal of leadership without a stable alternative framework presents the highest risk, potentially leading to fragmentation and external leverage.

The central conclusion of the article was that Ethiopia's future cannot be reduced to a binary political choice between leadership and opposition. Instead, it depends on the simultaneous realisation of sovereignty, development, and democratic legitimacy within a coherent institutional framework. The failure to achieve any one of these elements undermines the others, creating a cumulative risk to the state's long-term viability. Within this context, Abiy Ahmed emerges as a significant transitional figure rather than a definitive solution. His importance lies in his role within an ongoing structural transformation, the outcome of which will ultimately be determined not by individual leadership but by the extent to which Ethiopia succeeds in aligning its internal cohesion with its external ambitions. These external ambitions are not isolated. In fact, they require careful navigation in a very peculiarly framed geopolitical sphere that will not reward bystanders but those with projections. This subject will be the focus for my current four sequel articles.

## 1 Introduction to the Abraham Accords

The Abraham Accords,<sup>1</sup> signed in 2020, are conventionally portrayed as a diplomatic achievement fostering Arab–Israeli normalisation. This article—the first of a four-part series—argues that the Accords are better understood as an evolving *transactional coordination platform* through which the United States and Israel are restructuring the security order of the Gulf–Red Sea–Horn of Africa arc. The argument proceeds in six steps.

First, the article defines the energy and geopolitical architecture as an interdependent system of maritime chokepoints, hydrocarbon political economies, and resource-centric diplomacy. Second, it re-reads the Abraham Accords not as a peace framework but as the institutional scaffolding for Trumpian transactional geopolitics—a mechanism designed to align Gulf states behind Israeli strategic dominance by offering selective economic and security incentives while eliminating the principal obstacle to that dominance: Iran. Third, it analyses Operation Epic Fury (launched 28 February 2026) as the kinetic validation of this logic—the destruction of a “friendless Iran” that demonstrates to every Gulf monarchy the cost

<sup>1</sup>In November 2025, I read an interesting but unfinished article on X entitled “The Consequences of the Abraham Accord in the Gulf–Levant and Red Sea–Horn Geopolitics and Energy Arc”. It was a thoughtful and timely piece from a person clearly knowledgeable on Red Sea maritime and regional geopolitics, as it foresaw the impact of the Accords well before most observers. I took the initiative to modify and expand the article while formally acknowledging it for its initial insight, despite disagreeing with some of its premises. In general, we Ethiopians often lack the wisdom to focus on what matters most, preferring to waste our capacity in very hermitised squabbles whose time have passed. Instead, having the mentality to win together as one nation rather than rejoicing in ethnic banana republics must be the way forward. I hope this series will provide a broader perspective.

of remaining outside the Accords' umbrella. Fourth, it examines the dilemma this creates for Gulf states: collaborate with the Accords architecture, submit to its terms, or seek alternative protection from Russia and China—each path carrying distinct risks. Fifth, it traces how the Accords' logic has already created an alignment that extended into the Red Sea–Horn corridor through Israel's recognition of Somaliland and the consolidation of an Israel–UAE–India–Ethiopia convergence that competes with a Turkey–Egypt–Somalia–Saudi balancing coalition. Sixth, it situates these dynamics within the broader erosion of NATO and Europe's marginalisation as a coherent actor, which removes the multilateral constraints that historically moderated middle-power competition in the Horn neighbourhood.

For Ethiopia (*Eritrea*)<sup>2</sup>, the structural question is whether this alignment can be converted into development leverage and sovereign coastline recovery, or whether it merely substitutes one form of dependency for another. That question—which turns on domestic institutional capacity and political legitimacy—is deferred to Parts III and IV. Part II first examines how the competing alignments described here consolidate under conditions of permissive disorder—the contested, multipolar environment in which middle powers operate with diminished great-power constraint. This first instalment confines itself to the external structural order: who is reshaping it, by what mechanisms, and with what consequences for the arc.

The analysis further notes that Ethiopia's ethnic politics remain a decisive variable for national stability, and that ethnic oligarchy—the conversion of identity into a permanent cartel of gatekeepers—operates as an internally destructive political technology that external actors have repeatedly exploited.

## 2 Defining the Energy and Geopolitical Architecture

The Gulf–Red Sea–Horn energy and geopolitical architecture denotes a convergence of maritime chokepoints, hydrocarbon political economies, and resource-centric diplomacy. This is not rhetorical flourish but a description of interdependent systems in which perturbations propagate across domains. Disruption at the Bab al-Mandab, for example, affects shipping routes, insurance premia, supply-chain timing, and energy pricing simultaneously—as the Houthi campaign of 2023–24 and its 2026 resumption have demonstrated at scale.<sup>[4]</sup>

The Red Sea is a pivotal conduit within this arc. SIPRI's 2024 analysis emphasises hybrid security vulnerabilities: Houthi attacks, resurgent piracy, and migratory pressures have transformed local instability into global economic disruption. The strategic position can increase leverage for littoral states and attract investment in security infrastructure; conversely, it accelerates conflict escalation by drawing in external powers and compounding local fragilities.

Gulf hydrocarbon influence endures amid diversification rhetoric. Sovereign wealth funds from the United Arab Emirates (UAE) and Saudi Arabia channel revenues into infrastructure, port development, and defence procurement, exercising influence through investment and contracting rather than direct coercion. The UAE's basing strategy in the Horn—exemplified by its 2016 lease of Assab in Eritrea—turns ports into power-projection nodes designed to secure trade routes and access. UAE's military base in Assab was primarily used in its involvement in the deadly war in Yemen. It was also used to help Abiy defeat TPLF before it was dismantled in February 2021.<sup>[6]</sup> For landlocked Ethiopia, control of key gateways by external actors can become leverage in disputes, intersecting with internal politics where borderland communities—particularly Afar populations—perceive exclusion.

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Within the Horn, the Grand Ethiopian Renaissance Dam (GERD) elevates hydroelectric development to geopolitical stature, linking Nile Basin bargaining to Red Sea security. Ethiopia's potential to export electricity and generate revenue is counterbalanced by heightened tension with downstream states, particularly Egypt, which treats the dam as a water-security threat. For landlocked Ethiopia, corridor reliance intensifies vulnerability: dependence on Djibouti for the vast majority of trade creates exposure to external leverage that recent port diplomacy—the Somaliland memorandum of understanding (MoU) and the Berbera corridor—has only begun to diversify.

These interlinkages create an architecture in which energy securitisation, security imperatives, and geopolitical manoeuvring reinforce one another. The crucial implication for the rest of this article is that the Abraham Accords do not operate in a diplomatic vacuum; they operate *within* this architecture, and their structural effects propagate through it.

### 3 The Abraham Accords as a Transactional Security Platform

The Abraham Accords are conventionally presented as a diplomatic breakthrough—a peace framework enabling normalisation between Israel and Arab states. That reading is not wrong, but it is incomplete. Read through the lens of Trump-era transactional geopolitics, the Accords are better understood as the institutional scaffolding for a restructured Middle Eastern security order in which Israel occupies the dominant position, the United States provides the coercive backstop, and Gulf states are incentivised—or compelled—to align.

#### 3.1 The Transactional Logic

The original 2020 signatories—the UAE, Bahrain, Sudan, and Morocco—each received specific inducements: F-35 sales for Abu Dhabi, US recognition of Moroccan sovereignty over Western Sahara, Sudan's removal from the state sponsors of terrorism list. These were not incidental sweeteners; they were the architecture's load-bearing elements. The Accords function as a market in which diplomatic recognition of Israel is the price of admission and US security guarantees, arms transfers, and investment access are the goods on offer. Chatham House notes expanding trade and technological exchange alongside persistent security linkages.<sup>[2]</sup> The Moshe Dayan Center's 2025 review confirms that the Accords' institutional channels endured even the stress of October 7 and its aftermath.<sup>[3]</sup> Kazakhstan's symbolic accession in November 2025 extended the framework's reach into Central Asia.

The deeper logic, however, is not bilateral normalisation but *collective alignment behind Israeli strategic primacy*. The Accords construct a network in which signatories share intelligence, coordinate air defence, conduct joint exercises, and—crucially—treat Iran as the common threat that justifies the architecture. Netanyahu articulated this vision in February 2026 as the “Hexagon”—an “axis of countries that see eye to eye” linking Israel, Greece, Cyprus, India, and unspecified Arab and African states into a networked security architecture designed to counter both a “radical Shia axis” and an “emerging radical Sunni axis”. Unlike NATO's treaty-based collective defence, the Hexagon operates through distributed partnerships: if one node hedges, others compensate through alternative channels. Israel functions as the central connector linking Mediterranean partners with states extending toward the Gulf and the Indo-Pacific. The Abraham Accords provide the institutional foundation; Morocco's 2024 acquisition of Israeli reconnaissance satellite capabilities illustrates how normalisation has moved beyond diplomatic symbolism into deep structural collaboration embedding Israeli defence industries into regional security institutions.

In Trump's second-term foreign policy, the Hexagon logic has hardened. The administration's posture is explicitly transactional: allies are valued to the extent that they contribute to American objectives; those that do not are punished through tariffs, troop withdrawals, or diplomatic isolation. The Accords fit this template precisely: they create a coalition that serves US and Israeli interests simultaneously, reduces the cost of American power projection, and generates revenue through arms sales.

### 3.2 Iran as the Organising Threat

The architecture requires an adversary, and Iran has been cast in that role since the Accords' inception. The elimination of Iran's capacity to project power—through its Axis of Resistance (Hezbollah, the Houthis, Iraqi militias, Palestinian armed factions)—is not a side-effect of the Accords but their strategic rationale. A strong Iran gives Gulf states reason to hedge: to maintain back-channels to Tehran, to avoid overt alignment with Israel, to preserve diplomatic optionality. A destroyed Iran removes the hedge. If Iran cannot retaliate, cannot sustain its proxies, cannot credibly threaten Gulf energy infrastructure, then the cost of *not* joining the Accords rises sharply while the benefit of remaining outside falls to zero. This is the logic that Operation Epic Fury made kinetic. The war launched on 28 February 2026 was not an impulsive escalation; it was the logical culmination of a strategy designed to render Iran “friendless”—isolated from its proxies, abandoned by hedging neighbours, and incapable of deterring the US–Israeli coalition. The strikes killed Supreme Leader Khamenei, degraded over ninety per cent of Iranian ballistic missile launch capacity, neutralised the operational naval fleet, and struck military-industrial infrastructure across twenty-six provinces.[19, 20, 21] The message to every Gulf capital was unmistakable: Iran cannot protect you, and neither can anyone else except the coalition that just destroyed it.

### 3.3 The Saudi Prize

The ultimate target of this transactional architecture is not Iran but Saudi Arabia. Riyadh has resisted formal Accords membership, insisting on conditions—Palestinian statehood progress, a US defence treaty, civilian nuclear cooperation—that Washington has been unwilling to meet on Saudi terms. The elimination of Iran changes the calculus. With Tehran's deterrent capacity shattered, Saudi Arabia's primary security rationale for hedging evaporates. The kingdom's 2019 experience—when Iranian-linked drones struck the Abqaiq processing facility and the United States declined to retaliate—had driven Riyadh toward diplomatic engagement with Tehran and strategic caution toward Washington. Epic Fury reverses that lesson: the US *will* use devastating force against Iran, and the Gulf states that hosted American bases bore the brunt of Iranian retaliation precisely because they were inside the US security perimeter.[23]

The paradox is sharp. Gulf states were punished by Iran for being American partners, yet the only credible protection against further Iranian retaliation came from American and Israeli air defence systems. Iran's retaliatory strikes—over 165 ballistic missiles and 541 drones intercepted by the UAE alone in the first days, with civilian infrastructure in Bahrain, Kuwait, and Qatar also struck—demonstrated both the danger of proximity to the US and the impossibility of self-defence without it.[20] Saudi Arabia, the UAE, Kuwait, and Bahrain reportedly pressed Trump to continue the war until regime change was achieved in Tehran—a remarkable shift from the cautious hedging of the pre-2026 period.[28] The Accords, stress-tested under fire, emerged not weakened but *validated*: no signatory withdrew, joint air-defence coordination functioned operationally, and the framework demonstrated that it was not merely a diplomatic brand but a transaction-ready security platform capable of absorbing major kinetic shocks.

### 3.4 The Post-Iran Dividend: An Alignment of Winners

The coercive phase of the Accords—the elimination of Iran as a credible counterweight—is, however, only half the architecture. The other half is the positive-sum settlement that makes Saudi accession rational rather than merely compelled. With the shadow of Iranian fundamentalism removed from his back, Mohammed bin Salman (MBS) gains the political space to pursue the modernisation programme that Vision 2030 promised but that regional insecurity repeatedly constrained. The Iranian threat was never purely military; it was ideological. Tehran’s revolutionary legitimacy narrative—the claim that Shia resistance to American and Israeli hegemony represented authentic Islamic governance—provided ammunition to domestic Saudi conservatives who framed MBS’s social liberalisation (entertainment, tourism, women’s rights, religious pluralism) as capitulation to Western values. With the Iranian theocracy decapitated and its revolutionary model discredited by military defeat, the ideological constraint loosens. MBS can modernise without the charge that he is abandoning the Muslim world to its enemies. Israeli technology is the accelerant. Saudi Arabia’s fundamental economic challenge is not oil depletion but *water scarcity and agricultural dependency*. The kingdom imports over eighty per cent of its food; its aquifers are depleting at rates that make current agricultural production unsustainable beyond mid-century; and its climate makes conventional agriculture progressively unviable. Israel has spent seven decades solving precisely this problem. Israeli drip-irrigation systems reduce water consumption by forty to sixty per cent compared with conventional methods. Israeli desalination technology (reverse osmosis, membrane filtration) produces potable water at costs that have fallen below \$0.50 per cubic metre. Israeli precision agriculture—satellite-guided, AI-optimised, sensor-dense—turns marginal desert land into productive farmland. A Saudi–Israeli agricultural technology partnership would not merely improve Saudi food security; it would transform the Arabian interior. The *Nafud* and the *Rub’ al-Khali* are not inherently barren—they are under-irrigated. With Israeli technology, Saudi capital, and Ethiopian labour (the youth bulge that the Horn cannot yet absorb domestically), the Arabian Peninsula’s agricultural frontier could expand dramatically.

Israeli communications and cyber technology adds a second dimension. Saudi Arabia’s NEOM project—the flagship of Vision 2030—is designed as a technology city competing with Dubai and Singapore. Its success depends on world-class telecommunications infrastructure, cybersecurity, and AI integration. Israel’s Unit 8200 alumni have built one of the world’s most productive technology ecosystems, with particular strength in precisely the domains NEOM requires: cybersecurity, autonomous systems, telecommunications, and fintech. A normalised Saudi–Israeli relationship, formalised through the Accords, would give NEOM access to this ecosystem without the political friction that currently forces Saudi technology procurement through circuitous intermediaries.

The most strategically consequential dimension, however, is *energy infrastructure*. A pipeline network from the Saudi Eastern Province through Jordan and Israel to the Mediterranean would provide Saudi and Gulf hydrocarbons with a route to European markets that bypasses both the Strait of Hormuz and the Suez Canal. The distance from Dhahran to Haifa is approximately 1,500 kilometres overland—shorter, faster, and cheaper than the maritime route around the Arabian Peninsula, through the Bab al-Mandab, up the Red Sea, and through the Suez Canal (approximately 6,500 nautical miles). An overland pipeline eliminates Houthi shipping risk, Suez congestion risk, and the insurance premia that have plagued Red Sea transit since 2023. It also eliminates Egyptian transit leverage: every barrel that flows through Suez generates revenue and political influence for Cairo; every barrel that flows through a Saudi–Jordan–Israel pipeline does not. The India–Middle East–Europe Corridor (IMEC), which the Accords were explicitly designed to facilitate, provides the multilateral framework for such infrastructure.<sup>[5]</sup>

The pipeline logic has a direct and devastating implication for Egypt. The Suez Canal generates approximately \$9–10 billion annually in transit revenues—one of Egypt’s largest foreign-currency earners and a cornerstone of its fiscal stability. An overland energy corridor that diverts even a fraction of Gulf-to-Europe hydrocarbon traffic from Suez to a Saudi–Israel pipeline would compress Egyptian revenues, weaken Cairo’s fiscal position, and reduce its geopolitical leverage as a maritime gatekeeper. Combined with GERD’s upstream water control, the pipeline would subject Egypt to a two-front strategic squeeze: Nile water managed from Addis Ababa, hydrocarbon transit revenues diverted through Haifa. For the Netanyahu–Abiy–MBZ triangle, this is not an incidental externality; it is a structural feature. The weakening of Egypt serves all three vertices simultaneously: Israel removes its most militarily capable Arab neighbour from a position of leverage; Ethiopia reduces the principal external opponent of GERD; and the UAE constrains a competitor for Red Sea influence and Gulf investment flows.

What emerges from the post-Iran settlement is therefore not merely an alignment of convenience but an *alignment of winners*—a coalition in which each member gains more from cooperation than from any available alternative. Saudi Arabia gets security, technology, and a modernisation pathway. Israel gets normalisation, strategic depth, and a pipeline to Europe. The UAE gets commercial primacy and reduced Egyptian competition. Ethiopia gets corridor options, GERD protection, and a pathway to Red Sea access. The losers are equally clear: Iran is destroyed; Egypt is squeezed; Turkey is marginalised; and the counter-alignment (Egypt–Turkey–Somalia–Qatar) is deprived of its organising threat. The question for Part II is whether this alignment of winners can hold against the resentments it generates and the internal contradictions it contains.

### 3.5 The Defection Risk: Russia and China

If the Accords’ logic is coercive alignment, the countervailing risk is defection. Gulf states compelled into an architecture that subordinates their interests to Israeli strategic primacy may seek alternative patrons. Russia’s 2025 strategic treaty with Iran, China’s infrastructure investments across the Gulf-Red Sea (including Djibouti’s military base and Belt and Road logistics), and both powers’ diplomatic positioning in the UN Security Council provide alternative patronage options.

Yet the 2026 war has, paradoxically, narrowed these options. Russia, consumed by the Ukraine war and its own resource constraints, made no move to defend Iran despite their strategic partnership—confirming that Moscow’s security guarantees are unreliable outside its immediate neighbourhood. China abstained on the Security Council resolution condemning Iran’s retaliatory strikes on Gulf states, signalling that Beijing will not risk its Gulf economic relationships to defend Tehran. For Gulf monarchies, the implication is sobering: neither Russia nor China offers a credible security alternative to the US–Israeli architecture. The choice is not between the Accords and a rival security umbrella; it is between the Accords and strategic exposure.

This does not mean Gulf states will accept the arrangement passively. Saudi Arabia in particular retains leverage through oil pricing, sovereign wealth investment, and its capacity to obstruct or facilitate regional initiatives. The Saudi–UAE rivalry—Abu Dhabi’s port-and-basing model versus Riyadh’s counter-partnerships—introduces internal competition within the Accords-adjacent system.<sup>[14]</sup> But the structural trajectory is clear: the elimination of Iran as a credible counterweight compresses the strategic space for Gulf hedging and increases the gravitational pull of the US–Israeli architecture. The question deferred to Part II is whether this compression produces durable alignment or accumulating resentment.

## 4 Operation Epic Fury: a Structural Reordering of the Arc

On 28 February 2026, the United States and Israel launched Operation Epic Fury—a coordinated campaign of nearly 900 strikes in twelve hours against Iranian leadership, nuclear sites, missile systems, air defences, naval assets, and military-industrial infrastructure.[19, 20] Supreme Leader Ali Khamenei was killed in the opening salvo. By late March 2026, Iranian ballistic missile launch capacity had reportedly fallen by over ninety per cent, and the entirety of Iran’s operational naval fleet in the Gulf of Oman had been neutralised.[21] Iran retaliated with missiles and drones against Israel, Gulf bases, and commercial shipping infrastructure, triggering oil prices above \$114 per barrel and partial fuel rationing in South-East Asia.[20] The Houthis in Yemen resumed attacks on shipping and launched missiles toward Israel, opening a new front in the Red Sea–Horn corridor.[20]

The war was launched during active nuclear negotiations. Oman’s foreign minister had announced that Iran had agreed to permanently forgo enriched uranium stockpiling and to accept full IAEA verification—terms that, if implemented, would have addressed the ostensible US concern. Trump dismissed the progress, and the strikes began within hours. The timing is analytically significant: it suggests that the war’s objectives extended well beyond non-proliferation to encompass regime change, the permanent degradation of Iran’s military capacity, and the consolidation of the Accords as the region’s dominant security architecture.

For this article’s thesis, the war is consequential in three structural registers.

### 4.1 Validating the Accords as a Security Architecture

No signatory withdrew from the Accords during or after the strikes. Joint air-defence coordination—extending informally to non-signatories such as Saudi Arabia—demonstrated that the Accords function as a transaction-ready security platform under fire. The operational integration that emerged in 2026 extended the framework from diplomatic normalisation into theatre-level military cooperation. The Accords are no longer an aspiration; they are an infrastructure. The Israeli war planes roaming the skies of Saudi Arabia and the Gulf states while European airspaces were denied for NATO ally US shows the strength of the Accords security architecture but also the informal commitment of the Saudis in degrading Iran’s capability.

### 4.2 Degrading the Axis of Resistance

Iran’s proxy network—the principal mechanism through which Tehran projected influence into the Red Sea–Horn theatre—suffered structural damage. Hezbollah’s renewed strikes on Israel, Iraqi militia attacks on US bases, and Houthi missile launches in late March 2026 are better read as symptoms of a force managing decline than of sustained operational capacity.[22] If the four-layered structure of strategic legitimation, operational coordination, financial-logistical distribution, and deniability calibration collapses, the Red Sea balance shifts decisively. Houthi capacity to disrupt Bab al-Mandab shipping diminishes over time, reducing insurance premia and increasing the attractiveness of corridor investments through the Horn. Conversely, a protracted conflict or Strait of Hormuz closure could amplify energy shocks and draw additional external military assets into precisely the zone where middle-power competition is already intense.

### 4.3 Accelerating the Transition to Contested Multipolarity

US resource diversion toward the Persian Gulf reduces bandwidth for Ukraine and the Indo-Pacific simultaneously, offering Russia operational space in Europe and China strategic latitude in East Asia. For the Red Sea–Horn, the immediate effect is permissive disorder: great-power attention is consumed elsewhere, and middle powers—Saudi Arabia, the UAE, Turkey, Egypt, Israel—face fewer stabilising constraints on their competitive manoeuvres in the Horn corridor.[23] When great powers are operationally absorbed, the cost of middle-power assertiveness falls. The premium on internal cohesion for states like Ethiopia rises correspondingly. Here is the wisdom where all Ethiopians - and in fact, all Africa must Unite to be on the table before they all become on the menu.

## 5 Gulf States' Dilemma: Collaborate, Submit, or Pivot

Iran's retaliatory strikes on Gulf states laid bare a structural contradiction that had been latent since the Accords' inception. The Gulf monarchies—conservative dynastic regimes for whom the revolutionary zeal of the Islamic Republic has always been anathema—had spent decades managing the Iranian threat through a combination of US military partnership, cautious diplomacy, and selective hedging. The 2026 war collapsed this carefully constructed ambiguity.

Iran struck every Gulf state hosting US forces. Airports, seaports, residential areas, and energy infrastructure were hit—not all accidentally. Iran's foreign minister insisted that the strikes targeted the American military presence, not the host nations, but the distinction was meaningless to civilians under missile fire. The Gulf states had gone to considerable lengths to signal non-participation in the US–Israeli campaign, yet they were punished for the mere fact of being long-term American military partners.

The result is a forced choice along three paths, each carrying distinct risks and implications for the wider arc.

**Collaboration.** The first path is deeper integration into the Accords architecture—formalising what the war already demonstrated operationally. This offers the most credible security guarantee against future Iranian (or successor-regime) retaliation, access to Israeli intelligence and air-defence technology, and preferential positioning within US arms-transfer pipelines. The cost is political: formal alignment with Israel remains domestically contentious across the Arab world, and it subordinates Gulf foreign policy autonomy to the priorities of the US–Israeli coalition. For Saudi Arabia, this path leads toward the grand bargain that Trump has sought since his first term: Saudi recognition of Israel in exchange for a US defence treaty and civilian nuclear cooperation.

**Submission.** The second path is acquiescence without enthusiasm—remaining within the US security perimeter because no alternative exists, but resisting formal Accords membership and preserving rhetorical distance from Israel. This is the path of least resistance and greatest fragility: it offers security without agency, and it leaves Gulf states vulnerable to further transactional pressure from Washington (tariffs, arms conditionality, diplomatic coercion) without the institutional protections that formal membership might provide.

**Seeking alternatives.** The third path is a strategic pivot toward Russia, China, or some combination of non-Western patrons capable of providing security guarantees outside the US–Israeli framework. This path has theoretical appeal—diversification reduces dependency—but the 2026 war has exposed its practical limits. Russia did not defend Iran despite a strategic treaty. China abstained at the Security Council and showed no inclination to provide military protection for Gulf energy infrastructure. Neither power possesses the force-projection capability or the political will to underwrite Gulf security against

a US–Israeli coalition that has just demonstrated its capacity to destroy a regional power’s military in twelve hours. The alternative-patron path is, for now, a negotiating posture rather than a viable security strategy.

The structural consequence for the arc is that the Accords’ gravitational pull intensifies. Gulf states may resent the terms, but the elimination of Iran as a credible counterweight—and the demonstrated inadequacy of Russian and Chinese security guarantees—compresses the strategic space for hedging. The Accords are becoming less a voluntary coalition and more a structural necessity, which is precisely the outcome that the transactional logic was designed to produce.

## 6 Red Sea–Horn Corridor Politics: Bloc Competition

The Accords’ logic has already extended into the Red Sea–Horn corridor through a series of moves that combine recognition diplomacy, port concessions, and security cooperation into a competitive system.

### 6.1 The Israel–Somaliland Recognition

Martin Plaut’s January 2026 analysis treats Israel’s formal recognition of Somaliland (26 December 2025) as a marker that the Accords’ strategic logic has moved decisively into the Horn.[11] The recognition operates across three domains: as a legitimating signal that changes expectations about risk and partner credibility; as a security and logistics move amid heightened shipping disruption; and as an alignment accelerator that hardens the practical Israel–Somaliland–Ethiopia–UAE convergence.[4] By early March 2026, Israeli teams had surveyed sites near Berbera—high ridges approximately one hundred kilometres west of the port and locations within the port area itself—for a potential intelligence-sharing and anti-Houthi operations facility, adjacent to the UAE’s existing Berbera complex with its deep-water dock and four-kilometre runway. Ethiopia’s 2024 memorandum of understanding with Somaliland, which provided for approximately twenty kilometres of coastline near Berbera in exchange for diplomatic backing on recognition, now sits directly atop this new Israeli military infrastructure. The convergence of Israeli basing, Emirati logistics, and Ethiopian corridor interests in a single geographic node demonstrates the architecture’s capacity to fuse commercial, military, and diplomatic instruments. Houthi leader Abdul Malik al-Houthi immediately declared any Israeli assets in Somaliland “legitimate military targets”—a threat that, while so far unrealised, underscores how the Horn has become an active front in the Iran war. Reuters reported that Somaliland’s leadership expects to finalise a trade partnership with Israel, marketing resource and investment opportunities—including minerals—as the basis for expanded ties.[17] Such moves are immediately contested by Somalia as sovereignty violations and prompt wider regional pushback.

### 6.2 Convergent and Balancing Coalitions

The Red Sea–Horn approaches are increasingly governed by continuous middle-power contestation over chokepoints, ports, recognition diplomacy, and security outsourcing.[14] Within this system, claims of a “new axis” linking India, Israel, the UAE, and Ethiopia should be read with methodological discipline. The relevant object is not a treaty alliance but a *convergent portfolio* of interests: protection of sea lines of communication; corridor optionality via diversified port access; security–technology complementarities (ISR, cyber, maritime domain awareness); and diplomatic coordination that turns local nodes into internationally legible partners.[13, 15]

The countervailing configuration is a *balancing coalition* rather than a fixed bloc. Corridor competition incentivises Saudi Arabia to constrain Emirati overreach by strengthening relations with actors able to deny or delegitimise UAE-aligned moves. In practice, this elevates Somalia's federal government as a sovereignty anchor, deepens Turkish involvement as a security partner, and raises the salience of Egypt's Red Sea and Nile security concerns.[14, 16] Eritrea's geography makes it a focal point for courting and counter-courting, while Sudan and Yemen remain coupled arenas where Gulf rivalry interacts with civil conflict and maritime insecurity.[18, 15]

The analytic importance is not that any single alignment becomes determinative, but that corridor politics now operate through portfolios of contracts, legitimacy signals, and security services. Where the pre-2011 order relied more heavily on state-to-state bargains under great-power management, the post-2020s environment is characterised by permissive disorder, competitive middle-power patronage, and the strategic use of sub-state nodes.[12]

## 7 NATO's Erosion and Europe's Marginalisation

The Iran war did not create the NATO crisis, but it crystallised it. Under the 2026 US National Defense Strategy, Washington has explicitly reordered its priorities: homeland defence and China deterrence sit at the apex; Europe is characterised as "capable, and therefore accountable for its own defence".[24] The conceptual framework advanced by Under Secretary of War for Policy Elbridge Colby—so-called "NATO 3.0"—envisions a partnership in which European allies assume primary responsibility for conventional deterrence against Russia while the United States concentrates on the Indo-Pacific and selective global engagements.[25]

Trump's 1 April 2026 address sharpened the message further. Having demanded that European allies support the Iran campaign through basing and overflight, and having been rebuffed notably by Spain, Trump publicly questioned the reciprocity of the Atlantic alliance.[26] The Greenland episode earlier in 2026—punitive tariffs on eight NATO allies and threatened annexation of Danish sovereign territory—had already eroded Article 5 credibility.[27] The cumulative effect is a transatlantic relationship in which the foundational assumption—that the United States underwrites European security in exchange for alliance solidarity—is no longer operative.

European responses oscillate between strategic aspiration and institutional paralysis. The June 2025 Hague commitment to five per cent of GDP on defence by 2035 sets an ambitious ceiling, but implementation lags.[24] An analysis by the European Policy Centre concludes that the 2026 NDS "ends the era of automatic American primacy", making European strategic autonomy unavoidable—not as separation from the United States, but as responsibility within the alliance.[24]

For the Red Sea–Horn theatre, Europe's marginalisation produces three concrete effects. First, *reduced European policy coherence*: to the extent that EU external action is consumed by rearmament, Ukraine, and intra-alliance management, its bandwidth for the Horn diminishes, creating space for middle-power patrons to operate with fewer multilateral constraints. Second, *energy price transmission*: oil above \$100 per barrel compresses Ethiopian fiscal space, raises transport costs, and exacerbates inflationary pressures. If Houthi attacks persist, insurance premia rise, supply chains re-route, and the strategic salience of alternative corridors (Berbera, Assab, Lamu) increases—heightening the very corridor competition this article analyses. Third, *multipolar vacuums*: Russia (via the Africa Corps successor to Wagner in Sudan), China (Djibouti base, Belt and Road logistics), and both powers' diplomatic positioning provide alternative patronage options for Horn actors—but, as the Iran war demonstrated, without credible security guarantees.

The net structural consequence is that the post-Cold War order—in which a broadly liberal multilateral framework mediated by Western institutions constrained regional actors—is functionally exhausted in the Red Sea–Horn theatre. What has replaced it is a contested, transactional system in which US-led security blocs, middle-power patronage networks, and opportunistic great-power engagement coexist without overarching governance.

## 8 The Netanyahu–Abiy–MBZ Convergence and Its Implications

To read Ethiopia as merely one more node in the Accords-adjacent alignment system is to misunderstand both the depth of the relationship and the scale of the actor. Ethiopia’s connection to Israel is not transactional in the way that Bahrain’s or Morocco’s is. It is civilisational. The Solomonic dynasty that governed Ethiopia for 3000 years grounded its legitimacy in descent from King Solomon and the Queen of Sheba—a founding narrative that intertwined Ethiopian statehood with the Israelite tradition long before modern diplomacy existed.[31, 32] The *Kebra Nagast*, Ethiopia’s royal chronicle, is not merely a literary artefact; it is the constitutional mythology of a polity that understood itself as a covenanted nation in a relationship with the God of Israel. Menelik I, who is traditionally said to have assumed the throne in Ethiopia around 982–957 BCE from his mother Queen of Sheba, bringing the Ark of the Covenant to Ethiopia, is the beginning of the legend which is chronicled in Holy Books. Menelik I (not Emperor Menelik II of Adwa) is portrayed a result of the encounters of King Solomon of Israel and Queen of Sheba of Ethiopia. This is not a metaphor. It is the political grammar through which Ethiopian sovereignty was articulated for centuries, and it remains operative in Ethiopian national consciousness in ways that no amount of secular modernisation has displaced.

The relationship has a living demographic dimension too. The Beta Israel (Falasha) community—Ethiopian Jews whose presence in the highlands predates the modern state of Israel by millennia—was airlifted to Israel in Operations Moses (1984) and Solomon (1991). Today, over 160,000 Israelis of Ethiopian descent form a community that has produced military officers, successful entrepreneurs, political figures, and cultural leaders. This is not a marginal diaspora. It is a bridge population whose existence makes the Israel–Ethiopia relationship bilateral in a way that Israel’s relationships with Gulf monarchies can never be: there are Ethiopians in the Israeli Knesset, in the IDF’s officer corps, and in Israeli boardrooms. The human infrastructure of alignment already exists.

The convergence between Israeli Prime Minister Benjamin Netanyahu, Ethiopian Prime Minister Abiy Ahmed, and UAE President Mohammed bin Zayed (MBZ) must therefore be understood as a triangle in which Israel and Ethiopia are the structurally bonded vertices and the UAE is the enabling partner—the financier, logistics provider, and force multiplier. This is not an alliance of convenience; it is a convergence of deep interests that the Abraham Accords’ institutional architecture has made operationally legible.

### 8.1 The Five Interlocking Interests

The convergence rests on five interlocking pillars. First, *protecting GERD*: the UAE has been the most significant Gulf investor in Ethiopia and has a direct interest in a stable, economically growing Ethiopian market. Emirati support—diplomatic, financial, and through infrastructure investment—helps shield the dam from Egyptian pressure. Israel’s quiet diplomatic engagement reinforces this, as a strong Ethiopia aligned with the Accords serves Israeli strategic interests in the southern Red Sea. Second, *Horn influence*: all three actors seek to project power across the Horn—the UAE through its port-and-basing portfolio (Assab, Berbera, Bosaso), Israel through intelligence cooperation and recognition diplomacy,

and Ethiopia through its demographic weight, geographic centrality, and the gravitational pull it exerts over both Somalia and Somaliland, which operate within Ethiopia's power orbit. Third, *Red Sea access and the recovery of Ethiopia's sovereign coastline*: for Ethiopia, the strategic objective is not merely corridor diversification but the recovery of sovereign access to the sea—a question examined in detail below (Section 8.4). Fourth, *weakening Egypt*: Egypt is the principal opponent of GERD, the primary advocate for Somali territorial integrity (which obstructs Ethiopian–Somaliland corridor diplomacy), and a competitor for Red Sea influence. All three vertices of the triangle benefit from a diminished Egyptian capacity to obstruct their respective agendas. As analysed in Section 2.4, the prospective Saudi–Jordan–Israel energy pipeline would subject Egypt to a two-front strategic squeeze—Nile water managed from Addis Ababa, hydrocarbon transit revenues diverted from Suez through Haifa—that structurally degrades Cairo's fiscal and geopolitical position. For the triangle, Egypt's weakening is not collateral damage but a design objective. Fifth, *security architecture integration*: Israel provides intelligence, cyber, maritime domain awareness, and air-defence technology; the UAE provides finance and implementational capacity; Ethiopia supplies strategic geography, a 130-million-strong population, and a fast-growing economy whose trajectory will, within a generation, make it the dominant economic and military power in the Horn–Red Sea region.

## 8.2 Ethiopia as a Principal, Not a Client

The analytical error made by most Western and Gulf commentators is to treat Ethiopia as a developing country grateful for external patronage—a node to be “included” in alignment systems designed by others. This misreads Ethiopia's weight and trajectory. With approximately 130 million people, Ethiopia is the second most populous country in Africa. Its economy, despite the devastating war in Tigray and, more worryingly, the ongoing war in Amhara and Oromo regions, that increased the inflationary pressure and lack of confidence on investment due to security, has been one of the fastest-growing on the continent for the better part of two decades. Its military is the largest in the Horn by a decisive margin. Its geographic position—straddling the Nile Basin, adjacent to the Red Sea approaches, bordering five states—makes it the indispensable actor in any regional order.

Ethiopia is not in the Abraham Accords convergence to fill the numbers. It is there to be counted. Its demographic momentum, economic growth, and military capacity mean that it will, sooner or later, overtake the economic, military, and geopolitical scalp of every other actor in the Gulf–Red Sea–Horn region—whether through direct power, economic weight, or mediation. Both Somalia and Somaliland already operate within Ethiopia's power orbit: Addis Ababa's capacity to stabilise or destabilise either entity gives it structural leverage that no amount of Turkish military basing or Egyptian diplomatic posturing can neutralise. The Netanyahu–Abiy–MBZ triangle is not a patron–client arrangement with Ethiopia as the junior partner; it is a convergence of three actors who each bring indispensable assets to the table.

## 8.3 The Mutual Economic Dividend: A Global-Scale Proposition

The Netanyahu–Abiy–MBZ convergence is not merely a security alignment; it is an economic proposition of global scale, in which each vertex contributes an asset that the others lack and none can replicate alone.

*Israel contributes technology.* Seven decades of resource-constrained innovation have produced world-leading capabilities in precisely the domains that Ethiopia's development requires. Israeli drip-irrigation and micro-sprinkler systems—already deployed across arid zones from India to sub-Saharan Africa—

reduce water consumption by forty to sixty per cent while raising crop yields. Israeli agri-industrial processing technology transforms raw agricultural output into value-added exports: cold-chain logistics, post-harvest preservation, precision grading, and packaging systems that connect smallholder production to global supply chains. Israeli military technology—unmanned aerial systems, signals intelligence, cyber defence, border-surveillance platforms—addresses Ethiopia's security requirements across a vast and porous frontier. And Israeli expertise in technology education—from the Technion model to Unit 8200's talent pipeline—offers a transferable framework for building the human capital that Ethiopia's demographic trajectory demands. Israel's contribution is not charity; it is market-creating investment in a partner whose growth generates returns.

*The UAE contributes capital and implementational capacity.* Abu Dhabi's sovereign wealth (ADIA, Mubadala, ADQ) and Dubai's commercial ecosystem provide the financing, project management, and logistics expertise required to translate technology into infrastructure at scale. Emirati investment in Ethiopian agriculture, telecommunications, and port infrastructure is already substantial; the Accords' institutional framework makes it expandable and insurable. The UAE's role is not passive finance but active co-implementation: Emirati firms bring construction capacity, supply-chain management, and market access across the Gulf, South Asia, and East Africa that neither Israel nor Ethiopia can replicate independently.

*Ethiopia contributes what neither Israel nor the UAE possesses: a young, abundant workforce; vast cultivable land; and the largest untapped developmental space in the region.* Ethiopia's population—more than sixty-eight per cent under thirty—constitutes a labour force of extraordinary potential, currently under-employed and under-skilled. Its agricultural land, much of it rain-fed and fertile, remains among the least intensively farmed on the continent: Ethiopian cereal yields average roughly two tonnes per hectare, compared with four to five in Egypt and six to eight in Israel. The gap is not agro-climatic; it is technological and institutional. Israeli irrigation technology deployed on Ethiopian land, financed by Emirati capital, and operated by Ethiopian labour could close that gap within a generation—producing not subsistence output but export-grade commodities (coffee, sesame, pulses, horticulture, floriculture, livestock products) at volumes that reshape regional trade balances.

The developmental space itself is the asset. Where mature economies compete for marginal gains, Ethiopia offers the returns that only a large, fast-growing, under-capitalised economy can generate. Manufacturing, agri-processing, textiles, construction materials, pharmaceutical production, digital services—each sector represents a greenfield opportunity in which Israeli technology, Emirati capital, and Ethiopian labour combine to produce output competitive on global markets. The Hawassa Industrial Park, despite its difficulties, demonstrated the principle: purpose-built infrastructure, foreign technology, and Ethiopian labour producing garments for global brands. The Netanyahu–Abiy–MBZ triangle generalises that principle across sectors and at scale.

The mutual dividend extends beyond bilateral exchange. An Ethiopia that industrialises and urbanises at the rates its demographic trajectory implies becomes the dominant consumer market in the Horn–Red Sea region: 130 million people transitioning from subsistence to middle-income consumption generate demand for Israeli technology products, Emirati-financed infrastructure, and regionally produced goods. Ethiopian electricity exports from GERD—reaching neighbouring states including Sudan, Djibouti, and Kenya—position Ethiopia as the region's energy anchor, with revenues flowing back into the triangle's investment cycle. GERD's installed capacity of approximately 6 GW is substantial but finite; as Ethiopia urbanises and industrialises, domestic demand will absorb an increasing share, making early export agreements strategically important for establishing Ethiopia's role as a regional energy supplier before internal consumption catches up. The proposition is not extractive; it is generative. Each vertex's

contribution amplifies the returns to the others, creating a positive-sum dynamic that distinguishes this convergence from the patron–client relationships that have historically characterised external engagement with the Horn.

For Ethiopia, the strategic implication is precise: the triangle offers a pathway to the structural transformation—from agrarian subsistence to diversified, technology-enabled, export-oriented growth—that no single external partner can deliver alone. Israeli technology without Emirati capital remains a pilot project; Emirati capital without Israeli technology remains real-estate speculation; both without Ethiopian land, labour, and market remain abstractions. The convergence works because it is complementary, and it works at global scale because Ethiopia’s developmental gap is large enough to absorb investment at volumes that generate macro-level returns. This is why Ethiopia is a principal, not a client: it brings the asset—the developmental space itself—without which the triangle’s economic logic collapses.

## 8.4 The Sovereign Coastline Imperative

The most consequential strategic objective that Ethiopia brings to this convergence—and the one that makes the Israel–Ethiopia bond potentially permanent—is the recovery of its sovereign coastline. The approximately 180–200 kilometres from the Doumeira Mountains to Beilul, linking the Red Sea littoral to the Danakil hinterland, represents Ethiopia’s natural maritime frontage. This coastline was not lost through legitimate self-determination; it was severed through Italian colonial occupation, sustained through Cold War geopolitics, and formalised through an EPLF-led secession that was engineered by external actors—including Nile-basin rivals and colonial-era interests—whose strategic objective was the permanent weakening of Ethiopia.<sup>3</sup>

The legal foundation for Ethiopia’s claim is substantial and continuous. Italy’s acquisition of Assab in 1869—a commercial transaction with local Afar leaders, not a sovereign cession—and its occupation of Massawa in 1885 exploiting a power vacuum after Egyptian withdrawal were consolidated through the 1889 Treaty of Wuchale, whose deliberately divergent Italian and Amharic texts produced the protectorate dispute that culminated in the Battle of Adwa (1896). Emperor Menelik II’s decisive victory compelled Italy to recognise Ethiopian sovereignty through the Treaty of Addis Ababa, but the subsequent colonial boundary agreements of 1900, 1902, and 1908 were technical refinements imposed upon a structure already shaped by coercion, not genuine renegotiations between equal sovereigns. None represented a clear, voluntary cession of Assab, Massawa, or surrounding coastal territories. Crucially, the 1896 Treaty of Addis Ababa abrogated the Wuchale Treaty in its entirety, and the Addis Ababa treaty itself was rendered void by Italy’s 1935 re-invasion. The colonial-era cartographic and juridical framework thus left the fate of Ethiopia’s coastal lands juridically suspended. The United Nations recognised this when General Assembly Resolution 390(V) of 1950 federated Eritrea with Ethiopia—explicitly to restore Ethiopian sovereignty over its maritime frontage. The UN commission’s field study confirmed that the majority of Eritrea’s population favoured reintegration; more significantly, the Resolution was unequivocal that Ethiopia’s right to access the sea was to be preserved *irrespective of Eritrea’s political status*. Had Eritrea opted for complete independence, Ethiopia’s coastal territory would have been demarcated to ensure continued access. The federation was not a gift to Ethiopia; Ethiopia’s sea access was a right that the international community recognised as prior to and independent of the federation arrangement.

The peaceful path to recovering this coastline is the priority. Bilateral negotiation with Eritrea, multilateral frameworks, economic incentives, and corridor-sharing arrangements are the preferred instruments.

<sup>3</sup>The detailed argument for this interpretation is developed in Parts III and IV of this series, and in the author’s earlier work on Ethiopian state formation.

This article does not advocate war. But it states, with the honesty that this moment demands, that the peaceful path is not the only path available to a sovereign nation asserting a right that was never legitimately surrendered. Ethiopia possesses the demographic weight, the military capacity, and the strategic depth to recover its coastline by force if every diplomatic avenue is exhausted. Ethiopia will overrun Eritrea if it must, whatever the diplomatic or other cost. A nation of 130 million people cannot be permanently denied access to the sea by a garrison state of less than four million, and whose independence was the product of external engineering rather than organic self-determination.

The diplomatic cost of reclaiming what belongs to Ethiopia—whether the claim is traced to biblical covenant, Ottoman-era administration, or the pre-colonial sovereignty that Italian occupation violated—would be substantial but finite. The cost of permanent landlockedness is existential and compounding: economic strangulation, corridor dependency, strategic vulnerability to every external actor that controls a port. A rational calculus favours paying the former to avoid the latter, and I must add, anyone who has an ounce of blood of Ethiopianess shall support the recalibration of our maritime sovereignty without delay. Ethiopians need to ditch the monkey habit of ethnic entrepreneurship and be real Ethiopians, be Africans, and be humans - because we have lost our humanity and are prone to be played for bananas. Abiy is not being delusional when seeking access to the sea but the most realistic and patriotic against geopolitical injustice. His efforts to create alliances that matter most to the nation, despite a plethora of objections from the intellegentia, is commendable.

The Israel connection is decisive here. An Ethiopia that recovers its Red Sea coastline becomes Israel's permanent strategic partner on the western shore of the southern Red Sea—directly opposite Yemen, commanding the approaches to the Bab al-Mandab, and positioned to secure the maritime corridor on which Israeli trade with Asia depends. This is not a transient alignment of convenience; it is a structural complementarity that would bind the two states for generations. Israel's recognition of Somaliland is, in this reading, a preliminary move: it validates the principle of boundary revision in the Horn and creates a precedent that Ethiopia can invoke. The Netanyahu–Abiy–MBZ triangle, if it succeeds, produces a Red Sea western littoral in which Israel, through its Ethiopian and Somaliland partnerships, exercises strategic influence from Eilat to the Gulf of Aden—a corridor of extraordinary geopolitical value. Paying the diplomatic cost of coastline recovery will make Ethiopia and Israel forever partners.

## 8.5 Risks and Counter-Pressures

The risks are specific and serious. Ethiopia's alignment within the triangle positions it on one side of the Saudi–UAE rivalry, potentially alienating Riyadh. The convergence deepens Ethiopian dependence on Emirati capital at a moment when internal institutional weakness makes the state vulnerable to conditioned investment. The anti-Egyptian orientation risks escalating Nile Basin tensions to a level that could invite military confrontation or sustained Egyptian support for Ethiopian opposition movements. And the coastline question, if mishandled, could isolate Ethiopia diplomatically and provide Egypt, Turkey, and the counter-alignment with a legitimacy narrative against Ethiopian “expansionism”.

Yet the structural logic is compelling. Ethiopia's civilisational bond with Israel, its demographic and economic trajectory, its indispensable geography, and its sovereign coastline claim together make it not a client of the Accords architecture but a co-architect of the emerging Red Sea order. The decisive question—deferred to Parts III and IV—is whether Ethiopia's internal political economy is capable of sustaining the coherence and institutional discipline that this role demands.

## 9 Implications for Ethiopia (*Eritrea*)

For Ethiopia (*Eritrea*)<sup>4</sup>, the structural reordering analysed in this article produces a sharply defined set of operational implications.

The Houthi resumption of Red Sea attacks threatens shipping routes on which Ethiopian trade depends. Energy price volatility raises import costs and fiscal pressure on an already strained economy. The degradation of Iran’s proxy network may reduce one source of instability in the Horn, but it creates vacuums that competing middle powers will rush to fill. Ethiopia’s positioning within the Accords-adjacent convergence (Israel–UAE–India–Ethiopia) gains security credibility precisely when the architecture is demonstrated under fire; yet it simultaneously raises the profile of the counter-alignment (Egypt–Saudi Arabia–Turkey–Somalia), which frames Ethiopian corridor ambitions as destabilising.

The premium on domestic institutional credibility—the capacity to negotiate coherently, distribute corridor benefits transparently, and resist factional capture of external partnerships—is higher than at any point since the series began. In a contested, transactional system where cohesive states convert competition into investment and leverage while fragmented states become arenas in which external rivals settle scores, Ethiopia’s internal political economy is not a secondary domestic matter but the decisive strategic variable.

## 10 Conclusion: Setting the Stage

This article has argued that the Abraham Accords function as a transactional security platform whose logic—driven by Trumpian deal-making and Israeli strategic ambition—is designed to restructure the Gulf–Red Sea–Horn arc around Israeli dominance, with the elimination of Iran as the mechanism that compels Gulf alignment. Operation Epic Fury validated this architecture under fire. The Gulf states face a forced choice between collaboration, submission, and the pursuit of alternatives that the war itself has rendered less credible. Yet the post-Iran settlement offers more than coercion: it produces an *alignment of winners* in which Saudi Arabia gains modernisation capacity through Israeli technology and an overland energy corridor to Europe; Israel gains normalisation, strategic depth, and pipeline revenue; the UAE gains commercial primacy; and Ethiopia gains corridor options, GERD protection, and a pathway to sovereign Red Sea access. The losers—Iran destroyed, Egypt squeezed between Nile water management and Suez revenue diversion, Turkey marginalised—are equally structural. NATO’s erosion and Europe’s marginalisation remove the multilateral constraints that historically moderated middle-power competition in the Horn neighbourhood. Within this system, the Netanyahu–Abiy–MBZ triangle positions Ethiopia not as a client of the Accords architecture but as a co-architect of the emerging Red Sea order—a role grounded in civilisational affinity with Israel, demographic and economic weight that will make Ethiopia the dominant Horn–Red Sea power within a generation, and the sovereign imperative to recover the coastline from Doumeira to Beilul that was never legitimately surrendered.

The structural order is set. The question that follows is how the competing alignments consolidate, how corridor politics evolve under conditions of permissive disorder, and what opportunities and traps await Ethiopia (*Eritrea*) in a region where the rules have changed but the geography has not. Part II examines the emergent regional alignment system; Parts III and IV turn inward to the political economy and legitimacy constraints that determine whether Ethiopia converts external interest into development or

<sup>4</sup>In this series, *Eritrea* refers to a polity that is internationally recognised as independent but historically and structurally inseparable from Ethiopia. The political separation was shaped by a combination of internal administrative mismanagement and, more decisively, by externally sponsored secessionist engineering via the EPLF, facilitated by colonial sentiments, Cold War geopolitics, and Nile-basin rivalries aimed at weakening Ethiopia and, by extension, Africa.

succumbs to fragmentation.

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