The Abraham Accords: The Force Re-shaping the Gulf– Red-Sea– Horn Energy & Geopolitical Architecture

(Part 3/4: Ethiopia's Internal Constraint)

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Recap of Parts 1–2: Architecture and Competition

Part 1 established that the Abraham Accords function as a transactional security platform restructuring the Gulf–Red Sea–Horn architecture around Israeli strategic primacy, operationalised through Netanyahu's "Hexagon" concept of networked partnerships. Operation Epic Fury validated the Accords under fire and produced an alignment of winners through the Netanyahu–Abiy–MBZ triangle. The legal foundation for Ethiopia's sovereign coastline claim was traced from the Wuchale Treaty (1889) through UN Resolution 390(V) (1950), which explicitly preserved Ethiopia's maritime rights irrespective of Eritrea's political status.

Part 2 reframed the "permissive disorder" thesis: the United States has not abandoned the Horn but is re-engaging through the convergent alignment's Somaliland node. AFRICOM Commander General Anderson personally inspected Berbera in November 2025; monthly AFRICOM delegations have continued; Somaliland's Minister of the Presidency formally offered Washington exclusive mineral access and military bases in February 2026. Whether the US formalises basing or maintains operational engagement without formal commitment, Berbera is being transformed from an Israel–UAE node into a potential US–Israel–UAE–Ethiopia strategic complex. American presence in the Horn is therefore *partisan rather than moderating*: it strengthens the convergent alignment while the balancing coalition (Egypt–Turkey–Somalia–Saudi Arabia, with rising Saudi–Turkish accommodation) operates without American constraint. The Saudi–UAE divergence—de-escalatory developmentalism versus pre-emptive activism—has fractured Gulf unity, and Eritrea was identified as a vulnerability node whose weakness makes it a launching pad for any hostile power.

Both instalments concluded that the architecture raises the payoff to cohesion and the cost of fragmentation. Ethiopia's four singular interests—GERD (the engine of urbanisation and industrialisation), Red Sea sovereignty (self-defence before economics), economic development, and internal unity—can only be pursued by a state that is institutionally credible at the bargaining table. The convergent alignment now offers Ethiopia, through the Berbera node, proximity to American security infrastructure that strengthens its negotiating position across every dimension—but only so long as Ethiopia remains a credible, cohesive partner within it.

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"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 or crumbs. To put it bluntly, bananas are good treats for those with monkey habits, and feeding on crumbs under the table while elites feast on top via patronage politics and structural inequality is what characterises ethnic entrepreneurship."

This passage from Part 2 captures the analytical core of this third instalment. Internal unity is not a sentimental aspiration; it is the single variable on which every other strategic objective depends. The geopolitical architecture described in Parts 1 and 2 is, for a unified Ethiopia, the most favourable external environment in the country's modern history—American security infrastructure converging with Israeli technology, Emirati capital, and Ethiopia's demographic weight at a single strategic node. For a fractured Ethiopia governed by ethnic entrepreneurs, the same architecture becomes a multiplier of dismemberment: each external actor finds a faction to sponsor, corridor revenues become distributional prizes, and the state's capacity to negotiate as a unit collapses.

This third instalment therefore turns inward, but not in a domestic-policy register divorced from external strategy. The internal and external are inseparable: the ethnic federalism that converts diversity into zero-sum bargaining, the personalist governance that substitutes leadership for institutions, and the absence of a civic settlement capable of absorbing external pressure are precisely the fracture lines through which the balancing coalition penetrates Ethiopian strategic space. The "monkey habit" is not a metaphor for poor manners; it is the operational mechanism by which Ethiopia's external opportunities are squandered and its citizens are reduced to crumb-collectors at the table of their own dispossession.

1 Internal Political Economy as the Binding Constraint

External alignment can provide investment, security cooperation, and corridor optionality. The Netanyahu–Abiy–MBZ triangle offers Israeli technology, Emirati capital, and a pathway to structural transformation. The alignment of winners creates a geopolitical environment more favourable to Ethiopia's interests than any in its modern history. Yet these benefits materialise only where institutions can channel external resources toward public goods. In weakly institutional environments, external capital and security partnerships are readily captured by patronage networks, deepening inequality and grievance rather than generating development.

The strategic danger is specific and immediate, and it connects directly to each of the four singular interests. If GERD revenues—electricity exports, industrial park power supply, agricultural processing capacity—are distributed through ethnic patronage networks rather than transparent fiscal institutions, the dam becomes a factional prize rather than a national engine. The communities that host GERD infrastructure, those that consume its electricity, and those that export its surplus power each have distributional claims that can only be adjudicated through rule-bound fiscal institutions; ethnically coded distribution converts a national asset into a source of inter-regional grievance. If Red Sea sovereignty negotiations are conducted through personalist diplomacy rather than institutional statecraft, any agreement will be read—internally and externally—as an elite bargain that benefits connected insiders rather than the 130 million Ethiopians whose security depends on the coastline. The Somaliland MoU illustrates this risk: negotiated through personal channels, presented as a fait accompli, and instantly interpreted

through domestic ethnic lenses rather than as a national strategic act.

If the mutual economic dividend—Israeli irrigation technology on Ethiopian farmland, Emirati-financed manufacturing in Ethiopian industrial parks—is captured by politically connected firms rather than generating broad-based employment, the investment creates resentment rather than loyalty. Foreign investors, observing that returns flow to patronage networks rather than productive enterprise, reduce their risk appetite; the developmental space that makes Ethiopia attractive to the convergent alignment shrinks; and the positive-sum logic of the triangle degrades into the extractive logic that has historically characterised external engagement with the Horn.

The binding constraint is therefore institutional. Ethiopia's internal political economy determines whether the geopolitical architecture described in Parts 1 and 2 becomes a vehicle for prosperity or a multiplier of fragmentation. The four singular interests are all vulnerable to the same failure mode: factional capture converting national assets into distributional prizes, which in turn converts external partnerships into domestic grievances. The question is not whether the external environment is favourable—it is, more so than at any point in Ethiopian history—but whether the internal environment can absorb and productively deploy what the external environment offers.

2 The Monkey Habit: Ethnic Entrepreneurship as Operational Mechanism

The phrase "monkey habit of ethnic entrepreneurship" is not rhetorical excess. It names a specific political-economic phenomenon with identifiable actors, predictable behaviours, and measurable consequences. Understanding it as a mechanism—rather than as moral failing—is the precondition for dismantling it.

2.1 Defining the Ethnic Entrepreneur

An ethnic entrepreneur is a political actor who converts identity into a tradable asset—a currency of mobilisation, a vehicle for rent extraction, a passport to office. Ethnic entrepreneurs do not represent ethnic constituencies in any meaningful sense; they *produce* those constituencies through the manufacture of grievance, the curation of selective historical memory, and the cultivation of victimhood narratives that locate every problem outside the constituency and every solution within the entrepreneur's gift. Their stock-in-trade is not ideas but identity claims; their political method is not deliberation but mobilisation; their fiscal model is not productive enterprise but extraction from a captive base.

The Ethiopian variant of this archetype operates across every major identity formation. There are Oromo ethnic entrepreneurs who frame Amhara as historic oppressors and Tigrayans as elite usurpers, while themselves capturing land, contracts, and security positions through Oromo-coded patronage. There are Amhara ethnic entrepreneurs who frame Oromo as ungrateful insurgents and Tigrayans as treasonous separatists, while themselves leveraging Amhara mobilisation into personal political capital. There are Tigrayan ethnic entrepreneurs who frame the federal centre as an existential threat to Tigrayan survival, while themselves preserving the regional administrative apparatus that funds their networks. There are Somali, Afar, Sidama, Gurage, Wolayta, Anuak, Gumuz, and Argobba ethnic entrepreneurs operating with smaller theatres but identical scripts. Each speaks the language of liberation while practising the politics of capture.

The genius of the system—and the reason it has proven so durable—is that ethnic entrepreneurs from rival groups are functionally allies. They depend on each other. Without an Amhara ethnic entrepreneur

producing threat, the Oromo ethnic entrepreneur cannot mobilise his base. Without a Tigrayan ethnic entrepreneur insisting on existential threat, the Amhara ethnic entrepreneur cannot frame Tigray as the enemy that justifies his armed mobilisation. The rhetoric is opposed; the structural interests are convergent. They constitute a guild that profits collectively from the perpetuation of inter-group mistrust, and that loses collectively if Ethiopians ever recognise their shared interest in civic citizenship.

2.2 Patronage Politics and the Banana Economy

The fiscal architecture of ethnic entrepreneurship is patronage. Public office is treated as a private estate; appointments flow through ethnic coding; contracts go to politically connected firms; security forces are recruited and deployed through identity networks; development finance is captured at the regional administrative level and redistributed through clientelist channels long before reaching the populations in whose name it was disbursed. The Ethiopian budget—tens of billions of dollars annually in domestic revenue, external loans, and remittance inflows—becomes a banana plantation operated by the few for the few, with the many receiving the crumbs that fall from the elite table.

The banana metaphor is precise. A banana is a treat that satisfies briefly and produces no lasting nourishment; the recipient is grateful for the moment, returns for another, and never accumulates the resources to leave the plantation. Ethnic entrepreneurs distribute bananas: a road project in a politically loyal woreda, a security force recruitment drive in a vote-rich kebele, a public-sector job for a clan-connected youth, a subsidy for an identity-coded cooperative. None of these creates productive capacity; all of them generate dependence. The recipient experiences the patronage as benevolence; the political economy as a whole loses the investment that would have created jobs, the institution that would have delivered services, the public good that would have outlasted the patron.

Crumbs are the consolation for those outside the patronage circle. The Ethiopian who is not connected to the ruling party of his region, who lacks the clan network that opens doors, who has neither the language of mobilisation nor the appetite for ethnic combat—this Ethiopian feeds on crumbs. He is told that his poverty is the fault of another ethnic group, that his exclusion is the legacy of historical injustice committed by others, that his liberation requires the political dominance of *his* ethnic entrepreneur over the other groups' ethnic entrepreneurs. He is mobilised against rivals he has never met to defend interests he has never owned. While he marches, fights, dies, and grieves, the elites at the top of every ethnic faction dine together at conferences, in capitals, in safe houses, on bank accounts they hold in the same offshore jurisdictions. The crumbs are his portion; the feast is theirs.

2.3 Structural Inequality as the Output

The aggregate consequence of ethnic entrepreneurship is structural inequality of a particular and pernicious kind. It is not the inequality of productive economies, where capital accumulates around innovation, talent migrates to opportunity, and rising tides lift unequal boats. It is the inequality of *captured* economies, where political access determines economic outcomes, where merit is filtered through ethnic gates, where the same families and networks dominate across decades regardless of which party nominally holds power. A young Ethiopian entering the labour market in 2026 confronts an economy in which his ethnic identification, his region of origin, his family's political connections, and his command of the right party language matter more for his prospects than his skills, his work ethic, or his ideas. This is not a meritocratic system in transition; it is an aristocracy of identity in steady state.

The cumulative effect on the country is twofold. First, it produces emigration on a scale that depletes the talent base required for development. Ethiopians who can leave—the educated, the entrepreneurial,

the disillusioned—do leave, taking with them the skills and capital that would otherwise compound domestically. Second, it produces conflict on a scale that consumes the development gains that do accrue. Every birr spent on weapons, every day lost to ethnic violence, every infrastructure asset destroyed in inter-regional war, every hospital overwhelmed by displaced populations is a withdrawal from the developmental account. Ethnic entrepreneurship is not merely unjust; it is fiscally catastrophic, and its costs compound annually.

2.4 The Geopolitical Multiplier

What converts this domestic pathology into a strategic catastrophe is the geopolitical architecture analysed in Parts 1 and 2. In a moderating great-power order, ethnic entrepreneurship is a domestic problem with limited external dimensions: external actors might criticise human-rights abuses or condition aid, but they do not generally arm rival factions, recognise breakaway entities, or weaponise ethnic grievance against the state. In the architecture of permissive disorder, every domestic ethnic faction becomes a potential client for an external patron seeking leverage. The convergent alignment finds Oromo elites willing to sign Berbera MoUs without parliamentary scrutiny; the balancing coalition finds Amhara, Tigrayan, or peripheral grievances ready to be cultivated as counterweights. The fracture map of Ethiopian ethnic politics becomes the operating manual for external interference.

This is the precise mechanism by which Ethiopians are "played for bananas or crumbs". The ethnic entrepreneur takes the banana—a security partnership, a contract, a basing concession, a recognition signal—from the external patron, framing it as a gain for his ethnic constituency. His followers receive the crumbs: a momentary employment uptick in a politically loyal town, a road project that benefits the entrepreneur's home district, a militia mobilisation that delivers temporary security at the cost of permanent dependence. Meanwhile, the patron extracts the corresponding strategic asset—naval access, mineral rights, intelligence cooperation, basing rights, alignment in the bloc competition—and the Ethiopian state, as a unitary actor capable of negotiating on behalf of 130 million people, ceases to function. The four singular interests are bartered away, one ethnic transaction at a time, by entrepreneurs who count their personal gains in millions while the nation loses billions.

2.5 Why "Ditching the Monkey Habit" Is the Strategic Imperative

The monkey habit is named with precision. It is the behaviour of an animal trained to perform for treats, a creature whose horizon extends only to the next banana, whose memory does not retain the long sequence of bananas that has produced no cumulative improvement in its condition. To call it a "habit" rather than an ideology is to insist that it is changeable: not a destiny encoded in identity, but a learned pattern of response to a system designed to reward it. To call it "ethnic entrepreneurship" rather than "ethnic politics" is to locate the actors with precision: not whole communities but specific entrepreneurs who profit from the system, and who can be defunded, exposed, and replaced by political actors operating on civic foundations.

Ditching the monkey habit means three concrete things. First, it means citizens refusing to vote on ethnic lines, demanding instead that candidates compete on programmes, on ideas, on demonstrable competence rather than on identity claims. Second, it means civic actors—journalists, judges, civil servants, religious leaders, academics, professional associations—refusing to validate ethnic-coded narratives and insisting on the rule of law and impartial procedure as the only legitimate basis for political authority. Third, it means political organisations themselves abandoning the ethnic mobilisation toolkit and competing for support across identity lines on the basis of policy. None of this is sentimental aspiration; all of it is the

strategic precondition for surviving the geopolitical architecture analysed in Parts 1 and 2. A unified Ethiopia is the architecture of victory; a fractured Ethiopia is the architecture of dismemberment. The choice is in the hands of citizens who have, until now, accepted bananas as their portion. The bananas can be refused. The crumbs can be left on the floor. The feast above can be questioned, contested, and—through the slow, demanding, unglamorous work of civic citizenship—redistributed.

3 Ethnic Federalism: Recognition Versus Security Dilemmas

Our ethnic diversity must be celebrated and enjoyed immensely but shouldn't be commoditised politically. This is where it gets stupid. Ethnic federalism granted historically marginalised groups autonomy but entrenched identity as political currency. The International Crisis Group's 2009 report details the discontents: boundary disputes and elite mobilisation fuel zero-sum contestation in which control of a regional state determines access to land, employment, and public resources.[1] Abbink argues that the system intensifies ethnic cleavages rather than managing them, because the institutional design makes ethnic identity the primary channel for political participation and resource allocation.[3]

The result is a polity in which losing power equates to existential threat. When a group's access to security, livelihoods, and administrative authority depends on controlling "its" regional state, political competition becomes a survival contest rather than a governance exercise. Militia mobilisation follows logically: if the state cannot guarantee your security on the basis of citizenship, you must organise your own protection on the basis of ethnicity. This is not irrational behaviour; it is the rational response to an institutional design that makes ethnic solidarity the only credible insurance policy. The Amhara region's descent into armed conflict since 2023—documented by the International Crisis Group and Reuters—is the most acute current expression of this dynamic, but it is not unique; similar pressures operate in Oromia, the Somali region, and the southern nations.[2]

This matters to the geopolitical architecture because external competition systematically rewards internal fracture. Fragmented polities are *porous*: they generate multiple rival gatekeepers through which external actors can purchase influence, securitise investments, and stabilise preferred clients. The balancing coalition (Egypt–Turkey–Somalia) does not need to invade Ethiopia to weaken it; it merely needs to identify and support factions within a fractured state, converting ethnic grievance into proxy leverage. The historical precedent is exact: Britain's Brigadier Longrigg attempted precisely this during the 1942–1952 military administration of Eritrea, proposing a "Greater Tigray" partition designed to contain Ethiopian sovereignty by exploiting Tigrayan dissent, ethnic division between Muslim lowlanders and Christian highlanders, and economic vulnerabilities. The scheme failed only because the United Nations chose federation over partition. Today, no UN framework constrains the middle powers competing in the Horn, and the ethnic-federal structure provides a ready-made map of fracture lines that any external actor can read and exploit.

The mechanism is straightforward and connects directly to the bloc competition analysed in Part 2. Egypt, facing a two-front strategic squeeze (GERD upstream and Suez revenue diversion through the prospective Saudi–Israel pipeline), has every incentive to support Ethiopian opposition movements that weaken the state's capacity to manage GERD or assert coastline sovereignty. Turkey, invested in Somalia's federal government and competing with Israel for technological influence in the Horn, can cultivate relationships with Ethiopian factions that oppose the Netanyahu–Abiy–MBZ alignment. Saudi Arabia, pursuing de-escalatory developmentalism but resenting Emirati overreach, can offer alternative patronage to Ethiopian actors who feel excluded from the convergent alignment's benefits. None of these interventions requires military invasion; all require only that Ethiopian ethnic politics provides the entry

points—and ethnic federalism provides them in abundance.
Civic unity narrows the entry points for manipulation and expands the domestic win-set for cooperative outcomes. Genetic evidence reinforces the point with precision: low reported genetic differentiation between Oromo and Amhara populations (FST ≈ 0.01–0.02) makes the premise of quasi-biological separateness empirically implausible.[5] The salient differences are overwhelmingly linguistic, cultural, and politically constructed—and therefore politically malleable. A politics built on the fiction of biological separateness is not merely unjust; it is strategically suicidal in a geopolitical environment where cohesion determines survival. The strategic conclusion is that **ethnic oligarchy is a prelude to fragmentation**, and fragmentation is the condition under which the geopolitical architecture becomes determinative of Ethiopia's fate rather than merely constraining.

4 Abiy: Nationalist to Ethnic Cloak, and any Path Back?

Any honest analysis of Ethiopia's strategic predicament must reckon with Prime Minister Abiy Ahmed—not as a saint and not as a villain, but as a political actor whose trajectory reveals the operational mechanics of the monkey habit and, simultaneously, the only realistic vehicle through which the country can navigate the next eighteen months. Abiy is not the ideal leader Ethiopia would choose if the country had a deep bench of alternatives. He is, however, the leader Ethiopia has, and the architecture of the moment makes the choice between him and what could plausibly replace him—rather than between him and an imagined optimum—the only honest framing of the question.

4.1 The Nationalist Who Came In

When Abiy assumed office in April 2018, he did so as an unmistakably nationalist figure operating within a Pan-Ethiopian frame. The early months produced a sequence of acts that no ethnic entrepreneur could have authorised: the release of political prisoners across ethnic lines, the welcome home of opposition figures from every region, the rapprochement with Eritrea that culminated in the September 2018 Asmara accord, the public embrace of the Ethiopian Orthodox tradition alongside Islamic and Protestant constituencies, and the rhetoric of *medemer*—"synergy"—which sought to reframe Ethiopian politics as a project of common citizenship rather than ethnic accountancy. He spoke openly of Menelik II as a unifier, addressed Adwa as a national rather than ethnic victory, and articulated a vision of Ethiopian sovereignty—over GERD, over the Red Sea question, over its place in the African order—that drew on the entire civic tradition rather than any single regional narrative.
This was not an accident or a tactic. It was a coherent political bet: that Ethiopia could be governed as a nation rather than as a federation of ethnic estates, that economic development would create the constituency for civic politics, and that Ethiopia's external position would benefit from the projection of unitary purpose rather than ethnic-federal fragmentation. The bet was strategically correct—the four singular interests cannot be pursued by a fragmented state—but it required institutional foundations that did not exist, and it provoked predictable resistance from the entrenched ethnic-entrepreneur class whose business model the Pan-Ethiopian project threatened.

4.2 The Two Pressures That Forced the Retreat

Two compounding pressures pushed Abiy back into the ethnic cloak he had initially set aside. The first was the Tigray war (November 2020–November 2022), which the TPLF initiated through its attack on the Northern Command and which the federal government prosecuted with devastating force. Whatever

the legal and political defences of the federal response, the war's domestic effect was to mobilise Tigrayan grievance on a scale that no civic political programme could absorb in real time, and to position the Amhara regional state—through Fano militias and ENDF auxiliaries—as a co-belligerent whose post-war demands the federal centre could not satisfy. The Pretoria Agreement of November 2022 ended the military conflict, but the political settlement that followed disappointed both Tigrayan and Amhara constituencies: the former because federal recognition of Tigrayan administrative authority remained partial, the latter because territorial questions in Welkait, Tegede, and Raya were left unresolved. The civic narrative of *medemer* could not survive the brute distributional politics that the war's settlement required.

The second pressure was the rise of Jawar Mohammed and the maximalist Oromummaa current as a direct challenge to Abiy's leadership of the Oromo political constituency. Jawar's mobilisation capacity, particularly through the Qeerroo youth networks, threatened Abiy from his own ethnic flank: if Abiy remained a Pan-Ethiopian nationalist, Jawar could outflank him as the authentic Oromo voice; if Abiy responded with Oromo-coded mobilisation, he would forfeit the civic credibility on which his original political bet rested. The choice was not strategic but tactical, and it was forced rather than voluntary. Abiy chose retention of power over consistency of programme.

The retreat became operational through a sequence of decisions that observers across Ethiopian political opinion—including those broadly sympathetic to the federal government—recognised at the time as a turn toward ethnic-coded governance. Appointments tilted increasingly toward Oromo networks. Federal resources flowed disproportionately toward Oromia. Security responses to violence in Oromia (against opposition Oromo figures and against Amhara settlers) and in Amhara (against Fano mobilisation, against alleged ENDF auxiliaries-turned-insurgents) were calibrated through ethnic rather than civic logic. Most consequentially, the violence against Amhara civilians in Wollega (East and West)—a sustained pattern of attacks, kidnappings, and massacres targeting Amhara settler populations that has continued through 2025–26—met federal responses widely perceived in Amhara political opinion as inadequate, late, and rhetorically deflective. The accumulated effect was the conversion of the Amhara region from a federal partner during the Tigray war into a region in armed conflict with the federal centre by 2023, with Fano mobilisation now operating as a parallel security architecture across much of rural Amhara. The 2023 ICG analysis documents this trajectory in detail.[2]

4.3 What This Reveals About Abiy as a Political Actor

The honest reading is that Abiy's primary self-interest is power, not ethnicity. The retreat into the Oromo cloak was instrumental: it solved the immediate problem of consolidating his political base when both the TPLF and Jawar's Oromummaa current were challenging his authority simultaneously. It was not the expression of a deep ethnic identity but the calibration of a political survival strategy under conditions of acute pressure. The implication is precise and consequential: *Abiy can retreat from the ethnic cloak as readily as he assumed it, if the political circumstances change.* The variable is not Abiy's identity but Abiy's strategic calculation. Give him a national mandate—a coalition that delivers parliamentary majority on a Pan-Ethiopian programme—and he has demonstrated, in his first eighteen months in office, that he is capable of acting on it.

This is not a defence of his record on human rights, on press freedom, on the conduct of the Tigray war, on the security response to Wollega, or on the consolidation of executive authority that has hollowed out parliamentary deliberation. Each of those records merits the criticism it has received. The argument is narrower and strategic: in a country whose institutional infrastructure remains weak, whose opposition

parties remain organisationally thin, whose civic ecosystem is still recovering from EPRDF-era constraints and the disruption of consecutive wars, the choice presented to Ethiopians in June 2026 is not between Abiy and a robust civic alternative. It is between Abiy and what would actually emerge if he were defeated—which, on present evidence, is not a Pan-Ethiopian civic coalition but a fragmentation contest among ethnic-entrepreneur factions whose combined effect would be to deliver to the balancing coalition (Egypt–Turkey–Saudi Arabia–Eritrea–Somalia) precisely the porosity it is currently working to engineer.

4.4 The Conditions Under Which Abiy Could Reverse Course

The strategic question is therefore not whether to support or oppose Abiy in the abstract, but what conditions would induce Abiy to drop the ethnic cloak and resume the Pan-Ethiopian project that he originally articulated. Three conditions are necessary.

First, a national parliamentary majority that does not depend on Oromo-bloc voting. If the Prosperity Party (or any successor coalition Abiy leads) wins June 2026 with majorities anchored in Amhara, Tigray, the southern nations, and the urban cross-ethnic vote, the political logic that drove the retreat into the Oromo cloak is weakened: he no longer needs Jawar's constituency to remain in office. *Second*, a credible institutional programme that constrains executive volatility—a parliamentary deliberation requirement for major foreign policy commitments (the kind of process that would have made the Somaliland MoU defensible across constituencies), a fiscal transparency framework for GERD and corridor revenues, and a security sector reform that subjects military and intelligence appointments to civilian oversight. *Third*, a clear external mandate that converts the convergent alignment's offer (Israeli technology, Emirati capital, US engagement at Berbera, Indian naval cooperation) into legible national gains: ports, factories, electricity exports, water guarantees, mineral revenues that flow through transparent channels rather than patronage networks.

None of these conditions is automatic. Each requires civic mobilisation by Ethiopians who are willing to set aside ethnic mobilisation in favour of programmatic political competition. But the architecture of the moment makes them attainable in a way that they were not in 2018: the external environment now *rewards* cohesion (the convergent alignment offers more to a unified Ethiopia than to a fragmented one), the economic dynamics now *require* cohesion (the macroeconomic pressures discussed in §9 cannot be managed by an ethnically coded fiscal system), and the strategic threats now *punish* fragmentation (the Egyptian encirclement strategy works precisely through Ethiopia's internal divisions).

4.5 Why This Is Not an Endorsement But a Strategic Reading

Honest political analysis must distinguish between the leader one would choose and the leader the architecture of the moment makes available. Abiy is not the first preference of any civic-minded Ethiopian who values constitutional process, press freedom, and the institutional restraint of executive power. He is, however, the political actor whose self-interest can most plausibly be aligned with the country's strategic interest under current conditions, given the absence of a credible alternative coalition capable of delivering a Pan-Ethiopian programme through democratic competition. The June 2026 election is the test: Ethiopians who refuse to vote on ethnic lines, who support candidates competing on programmatic platforms, and who hold whichever coalition wins to a civic compact rather than an ethnic bargain are the only force that can convert Abiy's instrumental flexibility into national gain. The ethnic entrepreneurs in every camp have an interest in the opposite outcome: a fragmented vote that returns ethnic-coded majorities, an ineffective coalition government that cannot pursue the four singular interests, and a continuation of the politics that delivers bananas to the entrepreneurs and crumbs to everyone else.

5 Patriotism Versus Ethno-National Oligarchy: Reframing Fano as Civic Resistance

The internal axis of vulnerability is not "ethnic diversity" as a sociological fact; it is the *political technology* of ethnic essentialism—the conversion of identity into an oligarchic bargaining instrument sustained by fear production, selective victimhood narratives, and episodic coercion. This politics is backward in a precise analytic sense: it is biologically indefensible and institutionally corrosive.[5]

In this context, the Amhara mobilisation associated with *Fano* demands more discriminating analysis than "Amhara nationalism" provides. Stephen B. Smith argues that patriotism is a bounded loyalty to a political community compatible with moral limits and self-critique.[6] George Orwell distinguishes patriotism as primarily defensive from nationalism as the desire for dominance.[7] The distinction is not semantic; it determines whether resistance aims at equal citizenship or ethnic vindication.

Under this lens, **Fano is best interpreted—in its originating impulse and legitimate remit—as patriotic civic resistance against injustice**, not as a programme of ethnic supremacy. Its proximate drivers include acute insecurity, perceived state failure to provide protection, and exclusion from credible political settlements—drivers typical of defensive mobilisation that seeks the restoration of an enforceable political contract rather than the conquest of others.[10, 11, 12] Historically, Ethiopia's civic-patriotic repertoire includes irregular mobilisation in defence of sovereignty and local dignity—from Adwa to the Arbegnoch resistance against fascist occupation. The relevant claim is not that any group monopolises patriotism but that the tradition's political grammar is civic: anchored in the defence of shared political existence rather than in a doctrine of ethnic hierarchy.

Fano's legitimacy is conditional upon continued orientation toward unity, freedom, and equality across Ethiopia, not toward retribution. The moment defensive mobilisation hardens into restorative mythology or supremacy, it crosses into nationalism and reproduces the oligarchic logic that fractures states. The ICG's 2023 analysis warns of protracted instability in Amhara that state repression alone cannot resolve.[2] The strategic task is to hold civic resistance to strict patriotic constraints while dismantling the ethno-oligarchic incentive structure that generates the grievances in the first place.[8, 9]

The connection to the geopolitical architecture is direct and consequential. A state fractured by competing ethno-national projects—Oromummaa against Fano against TPLF against Somali regional ambitions—is a state incapable of protecting GERD, recovering its coastline, or absorbing the investment that the alignment of winners offers. Ethnic fragmentation converts the four singular interests from national objectives into factional bargaining chips, each captured by whichever group controls the relevant territory or institution. If GERD revenues flow to Oromo-connected enterprises, Amhara regions perceive extraction; if coastline negotiations are conducted through Oromo personalist channels, Afar populations through whose territory the coastline runs perceive exclusion; if Israeli technology partnerships benefit politically connected firms, the developmental space that justifies the triangle's economic logic shrinks. This is the pathway to dismemberment, and it is precisely the condition that external competitors—Egypt, Turkey, the balancing coalition—will exploit.

6 TPLF After War: Defeat, Persistence, and Bargaining Power

The TPLF's military defeat in the Tigray war did not eliminate its structural relevance. It remains embedded in Ethiopia's recent history as an actor with organisational capacity, diaspora networks, regional administrative control, and the residual loyalty of a population that suffered devastating losses. The Pretoria Agreement of November 2022 ended the military conflict, but the political settlement remains

incomplete: disarmament has progressed unevenly, humanitarian access has been contested, and the question of transitional justice remains unresolved.

Any durable civic settlement must treat post-war arrangements as political bargains rather than final victories. The risk of treating military defeat as political settlement is that unresolved grievances resurface as destabilising factors—precisely the kind of internal fracture that external competitors exploit under permissive disorder. The balancing coalition can find in Tigrayan grievance a lever against Ethiopian cohesion, just as it can find in Amhara insecurity a lever against the Addis Ababa–Mogadishu–Hargeisa corridor diplomacy. For the four singular interests, the TPLF question is a test case: if Tigray can be integrated into a national framework that provides security, development, and political participation on the basis of citizenship rather than ethnic bargaining, the model can be extended to other regions. If Tigray remains a zone of unresolved grievance and administrative neglect, it becomes another vulnerability node through which external actors penetrate Ethiopian strategic space.

7 Ethiopian Somali Politics and the Somaliland Precedent

The recognition of Somaliland, and the wider internationalisation of Somali politics, reverberate inside Ethiopia's Somali region with implications that extend beyond secessionism to the fundamental question of how Ethiopia manages its multi-ethnic periphery under conditions of external competition.

Ethiopia's 2024 MoU with Somaliland—providing approximately twenty kilometres of coastline near Berbera in exchange for diplomatic backing—positions Addis Ababa as an active participant in Somali fragmentation politics. This is strategically rational from the perspective of the four singular interests: the MoU advances corridor diversification (reducing Djibouti dependency), aligns Ethiopia with the convergent bloc (Israel–UAE–India), and creates a precedent for boundary revision that Ethiopia can invoke for its own Doumeira–Beilul claim. But the domestic reverberations are significant. If Ethiopia is seen as an agent of Somali fragmentation—supporting Somaliland's separation while contesting Somalia's federal sovereignty—it faces reciprocal external mobilisation against its own cohesion. The balancing coalition (Egypt–Turkey–Somalia) gains a powerful legitimacy argument: if Ethiopia endorses the fragmentation of its neighbours, why should its own territorial integrity be respected?

Within Ethiopia's Somali region, local elites, economic networks, and external patrons are recalibrating their options in response to the internationalisation of Somali politics. The risk is not simple contagion of secessionism but a more complex dynamic in which the Somaliland precedent empowers sub-state entrepreneurialism—the leveraging of external recognition, investment, and security partnerships by regional authorities operating semi-autonomously from the federal centre. The Somali theatre must therefore be treated as a domestic governance issue as much as a foreign policy problem, consistent with the thesis that internal unity is the binding constraint on all four singular interests.

8 Ethnic Division as Encirclement: The External Stress Test

The architecture analysed in Parts 1 and 2 is the most favourable external environment Ethiopia has faced in modern history—*provided* the country can present itself as a unitary actor at the bargaining table. The same architecture, applied to a fractured polity governed by ethnic entrepreneurs, becomes the most efficient mechanism for dismemberment that the country has yet faced. This section examines three concrete pressures—Egypt's encirclement strategy, the Eritrean question, and the post-Iran contest for Sunni Islamic leadership—each of which is designed to be defeated by Ethiopian cohesion and is structurally rewarded by Ethiopian fragmentation.

8.1 Egypt's Encirclement: Coercive Diplomacy at Continental Scale

Egypt has constructed, over 2025–26, the most sophisticated regional containment strategy that Ethiopia has faced since the imperial period. The April 2026 reporting in *The National* describes a continent-wide diplomatic and military push to isolate Addis Ababa, using a combination of soft diplomacy, technical-expertise sharing, military training of African cadets, arms deals, and direct deployment of forces.[16] Egyptian troop deployment in Somalia under AUSSOM is now reported at up to 15,000 personnel; military facilities have been secured at Eritrea's Assab and Djibouti's Doraleh ports through agreements that include provisions for upgrading and access; in the past year alone, Cairo has struck arms deals or military-cooperation agreements with Nigeria, the Democratic Republic of Congo, Burkina Faso, Burundi, Kenya, Algeria, and Morocco. President Sisi's framing is unambiguous: "Egypt will not be lenient when it comes to its existential water interests."[16]

The strategy is layered. At the multilateral level, Egypt's February 2026 chairmanship of the African Union Peace and Security Council (PSC) was used to align continental institutions with Cairo's framing of GERD and Somaliland disputes; the 2026 AU Theme of the Year on water security amplified the same agenda.[17] At the bilateral level, Egypt has pursued targeted financial inducements: $100 million in dam-project funding for Kenya, troop commitments to AUSSOM, security-sector training for nations across the continent. At the rhetorical level, Foreign Minister Abdelatty's October 2025 declaration that "Ethiopia will remain a land-locked nation until Judgment Day, with no role whatsoever in the Red Sea" converted the dispute from a bilateral water question into an existential exclusion of Ethiopia from the Red Sea regional order.[17]

Egypt's coercive diplomacy has a characteristic pattern: float a proposition, register pressure, and—when scrutiny intensifies—withdraw the offer while preserving the underlying leverage. The February 2026 floated offer to facilitate Ethiopian Red Sea port access in exchange for "flexibility" on Nile binding rules and abandonment of any Ethiopian coastal military base was retracted within twenty-four hours; what remained was the implicit threat that Egyptian leverage at Assab and Doraleh would obstruct Ethiopian commerce if the unilateral concessions were not made.[18] The structure is precise: Egypt offers to moderate pressure it has itself constructed, in exchange for concessions it has been unable to extract through negotiation. The implicit threat is its inverse. This is coercion dressed in the language of cooperation.

The deepening Egypt–Eritrea alignment is the most consequential element of this architecture. In mid-April 2026, a senior Eritrean delegation led by Hagos Gebrehiwet—Head of Economic Affairs of the PFDJ and the principal economic architect of the Isaias administration—arrived in Cairo for a three-day official visit covering foreign affairs, investment, trade, industry, transport, electricity, agriculture, and central banking. Egyptian Foreign Minister Abdelatty publicly reaffirmed Cairo's support for Eritrean sovereignty and territorial integrity.[19] The convergence is now operational: Egyptian access at Assab places Egyptian precision-guided munitions and cruise missiles within approximately 500 kilometres of GERD; Egyptian troops in Somalia provide a south-eastern flank against Ethiopia; Egyptian engagement with Djibouti at Doraleh threatens the corridor that handles over ninety per cent of Ethiopian trade. The encirclement is no longer hypothetical.

The mechanism by which this encirclement penetrates Ethiopia is precisely the ethnic fracture map that the monkey habit produces. Egypt does not need to invade Ethiopia; it needs only to support Tigrayan grievance, Amhara insurgency, Oromo dissent, Afar opposition, or Somali regional ambition—each of which is available, each of which has been cultivated for decades by Ethiopian ethnic entrepreneurs, and each of which can be activated through external financing, arms transfers, and diplomatic recognition.

Every Ethiopian who casts a vote on ethnic lines, every Ethiopian commentator who frames opposition to Abiy in identity rather than programmatic terms, every Ethiopian elite who participates in patronage networks coded by region or language, is contributing—usually unknowingly—to the porosity that Egypt's encirclement is designed to exploit.

8.2 Legal Foundations: Wuchale, Res. 390(V), Algiers, and AU's Complicity

Before the strategic question can be addressed honestly, the legal record must be laid out without diplomatic apology. The case for Ethiopian sea sovereignty is not a revisionist claim seeking to overturn settled order. It is the assertion of rights that were systematically extinguished through external engineering, internal misgovernance, and—most pointedly—the complicity of African continental institutions that betrayed their own founding charter.

Italy never held absolute sovereignty in perpetuity. The legal nuance commonly elided in regional discourse is that Italy's claim to the Eritrean coast was always contingent, never absolute. Five points of the historical record establish this. *First*, the October 1887 secret Antonelli–Menelik treaty—the foundational instrument of the Italo–Ethiopian engagement that produced Wuchale—contained Italy's explicit *renunciation of any intention of annexing Ethiopian territory* in exchange for Menelik's neutrality and 5,000 Remington rifles. The 1889 Wuchale Treaty must therefore be read against the prior commitment that Italy itself had given: Italian acquisitions in the Mareb Mellash were instrumental, not absolute, and the basis on which Italy negotiated rejected the very perpetual sovereignty its later colonial administration claimed. *Second*, Article 6 of the Wuchale Treaty itself granted Ethiopia free transit of its army through Massawa, while Article 5 imposed only an 8% port duty on Ethiopian commerce. The treaty Italy used to claim the coast embedded explicit Ethiopian rights of access and movement *within Italian-administered territory*—an architecture inconsistent with absolute Italian sovereignty and consistent only with a regime in which Ethiopian sovereign rights persisted alongside Italian administration. *Third*, Menelik II repudiated Italy's protectorate claim in September 1890 and *officially denounced the entire Wuchale Treaty in 1893*—three years before the Battle of Adwa, on the basis of the Italian text's fraudulent rendering of Article XVII. By 1893 the treaty Italy invoked as the basis for its colonial position was, in Ethiopian sovereign judgement, void. *Fourth*, the 1896 Treaty of Addis Ababa, signed under the conditions Italy's Adwa defeat imposed, expressly nullified the Wuchale Treaty in its entirety. The juridical basis for Italian colonial administration of Eritrea after 1896 was therefore not Wuchale—which was dead—but the unequal boundary protocols of 1900, 1902, and 1908, imposed upon a defeated Italy by an Ethiopia constrained to accept administrative arrangements while preserving its underlying sovereignty claim. *Fifth*, Italy's 1935 invasion voided even those instruments under the elementary international-law principle that an aggressor cannot benefit from its aggression; the 1947 Italian Peace Treaty (Article 23) had Italy renounce all rights and titles to its colonial possessions, transferring disposal authority to the Allied Powers, and ultimately to the United Nations. At no point from 1887 onwards did Italy hold the unconditional, perpetual, transferable sovereignty over the Eritrean coast that subsequent narratives sometimes imply.

The implication is decisive. The chain that runs "Italy held the coast → Eritrea inherited the coast → Eritrea is sovereign over the coast" fails at its first link. Italy never held what its successor regimes claimed to inherit. The international community recognised this in 1950, when General Assembly Resolution 390(V) addressed the disposal of the former Italian colony *not* as the transfer of an existing sovereign asset but as the resolution of a territory whose status had been suspended pending legitimate process. Resolution 390(V) explicitly preserved Ethiopia's right to sea access *irrespective* of Eritrea's

political status—a provision that would be juridically incoherent if Italy had previously held absolute, unconditional sovereignty that simply transferred to a successor.

The Wuchale–Adwa chain. Italy's acquisition of Assab in 1869 was a commercial transaction with local Afar leaders that conferred no sovereign title; its 1885 occupation of Massawa exploited the Egyptian withdrawal rather than any cession from the Ethiopian sovereign. The 1889 Treaty of Wuchale, whose deliberately divergent Italian and Amharic Article XVII texts produced the protectorate dispute, was settled by force of arms at the Battle of Adwa (1896)—a victory that compelled Italy to recognise Ethiopian sovereignty through the Treaty of Addis Ababa. The 1900, 1902, and 1908 boundary agreements were technical refinements imposed upon a structure already shaped by coercion, not genuine renegotiations between equal sovereigns. The colonial-era cartographic and juridical framework left the fate of Ethiopia's coastal lands juridically suspended—not transferred away from Ethiopia, but suspended pending the restoration of legitimate process.

UN Resolution 390(V). The post-war international community recognised this when General Assembly Resolution 390(V) of 1950 federated Eritrea with Ethiopia. The resolution explicitly preserved Ethiopia's right to sea access *irrespective* of Eritrea's political status. Had Eritrea opted for complete independence, Ethiopia's coastal territory would have been demarcated to ensure continued sovereign access. This is not a footnote; it is the operative legal principle. 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 OAU's foundational hypocrisy. On 14 November 1962, Emperor Haile Selassie—through act of the Eritrean Assembly—dissolved the federation and made Eritrea Ethiopia's fourteenth province. Six months later, on 25 May 1963, the Organization of African Unity was constituted in Addis Ababa with Eritrea as Ethiopian territory. The 1964 Cairo Resolution AHG/Res. 16(I) committed member states to respect the borders "existing on their achievement of national independence"—the *uti possidetis* principle. *Applied to its own founding moment, this principle locks in Eritrea as Ethiopian territory.* The OAU's own charter, on its own terms, registered Eritrea as a province of Ethiopia. There is no legal aperture, in OAU/AU jurisprudence on its own foundational record, through which Eritrea's 1993 secession can be reconciled with the principle that the organisation was created to defend.

The internal facilitator: TPLF and the 1993 abandonment. The OAU's external silence cannot be analysed in isolation from the internal political agency that made it possible—and the decisive legal point is that the agency itself had no mandate to act.

The Transitional Government of Ethiopia (TGE), in office from July 1991 until August 1995, was constituted under the Transitional Charter adopted in July 1991 by a conference convened by the EPRDF after the military victory over the Derg. The Charter was not submitted to the Ethiopian electorate; no national referendum approved it; no parliament elected by the broader Ethiopian population endorsed it; the 1955 Constitution remained the last instrument of Ethiopian sovereignty to have received any form of national ratification, and the 1995 Constitution under which Meles Zenawi later became Prime Minister was not adopted until December 1994 and not in force until August 1995. For the entire 1991–1995 period in which the most consequential decisions about Ethiopian sovereign territory were taken—the constitutional architecture of ethnic federalism, the conduct of the 1993 Eritrean referendum, and the diplomatic posture toward sea access—the body taking those decisions was an executive committee of factional victors operating without electoral or constitutional foundation. *It had no mandate to bind Ethiopia.*

This is not a partisan characterisation; it is a basic point of constitutional law. A transitional government, by definition, holds power on a temporary and procedural basis pending the establishment of legitimate

constitutional order. Its function is to manage continuity and to convene the institutions through which sovereign decisions can be made by mandated bodies. It is *not* empowered to take decisions of permanent constitutional consequence—the alienation of territory, the extinction of sovereign rights, the surrender of strategic assets—that bind successor governments and successor generations. When a transitional government takes such decisions, it acts *ultra vires*: beyond the authority that its transitional character permits, and therefore on a legal basis that any legitimately mandated successor government can subsequently contest.

The 1993 acquiescence in Eritrean secession violated this principle directly. The Transitional Government convened a referendum on Eritrean independence in April 1993 in which only Eritrean voters participated, conducted under EPLF monopoly control inside Eritrea, with no parallel mechanism by which the Ethiopian electorate could express any view on whether 1,200 kilometres of strategically critical coastline, the Ethiopian sovereign maritime presence preserved by Resolution 390(V), and the centuries-old Ethiopian relationship with the Red Sea littoral should be surrendered. No Ethiopian voter was asked. No Ethiopian parliament with an electoral mandate from the broader population deliberated. No constitutional process recognised under any prior or subsequent Ethiopian constitution authorised the executive to take this decision unilaterally. The TGE simply did so—and the international community, including the OAU, accepted the result as if it had been the act of a mandated Ethiopian sovereign government.

The legal consequence is that the 1993 abandonment of sovereign sea access can be challenged, by a future legitimately mandated Ethiopian government, on the constitutional ground that it was performed by a body without authority to take a decision of that magnitude. This is not a retrospective revision of accepted history; it is the application of standard constitutional doctrine to the actual chain of events. The same point applies to the 2000 Algiers Agreement, signed by a Meles government that, although by then operating under the 1995 Constitution, had not received any specific electoral mandate from the Ethiopian people to settle the question of sovereign sea access on terms that excluded that question from the agreement's scope.

The political character of the TPLF leadership reinforced the consequences of the constitutional irregularity. The Transitional Government was dominated by the TPLF under Meles Zenawi, whose pre-1991 ideological alignment with the EPLF—formalised through years of operational cooperation between the two fronts during the war against the Derg—was reflected directly in the post-1991 settlement. The TPLF's political project, articulated in Meles's developmental-state writings and in his political conduct through the 1990s and 2000s, included a vision of regional reordering in which Tigray and Eritrea together would constitute the dominant economic and political pole of the northern Horn—a "Horn of Africa Singapore" anchored on Tigrayan–Eritrean elite cooperation, oriented commercially through Eritrean Red Sea ports, and politically distinct from the broader Ethiopian polity that the TPLF leadership privately regarded with hostility. This vision was never publicly avowed in those terms, but it is consistent with the operational record: the unilateral cession of sea access through a referendum from which Ethiopian voters were excluded; the federalist constitutional architecture that converted Tigray into a constitutionally privileged regional state with disproportionate access to defence and economic capacity; the prosecution of Amhara identity through demographic and administrative measures; the cultivation of Tigrayan economic networks across federal institutions; and—decisively—the 2000 Algiers Agreement.

Algiers as continuation of the betrayal. The 2000 Algiers Agreement, signed by the Meles government that had abandoned sovereign sea access in 1993, addressed the land boundary alone. The opportunity to re-open the maritime question—which the 1998–2000 border war and the EPLF's re-

newed exposure had created—was deliberately not taken. Ethiopia under Meles signed an instrument that ended the war on terms preserving the geopolitical status quo of Ethiopian landlockedness, accepted an Eritrea–Ethiopia Boundary Commission whose mandate excluded sea access by design, and committed Ethiopia to the binding character of a ruling whose juridical scope did not reach the question that mattered most for Ethiopian long-term security. The Meles government's framing of the Algiers Agreement as a victory was, in strategic terms, the formalisation of a defeat that the same government had engineered seven years earlier.

The relationship with Egypt during the Meles years reinforces this reading. Cairo's posture toward GERD construction in the early phase—wary but not yet hostile—reflected an Egyptian assessment that the Meles government would not press maritime questions that could threaten Egyptian Nile-basin interests, and would manage GERD's progress at a pace that allowed continued Egyptian downstream control. Whether Meles's relationship with Cairo crossed the line into operational complicity, or simply reflected aligned interests in maintaining Ethiopia's dependency on others' coasts, is a question for historians with archival access. What is documented is that the period in which Meles led Ethiopia coincides with the institutionalisation of Ethiopian landlockedness as a regional fact—an outcome that served Egyptian strategic interests directly and Tigrayan-Eritrean elite reordering interests indirectly, and that served the Ethiopian national interest not at all.

The OAU's silence in 1993 and 2000 must therefore be understood as more than continental institutional failure. It was the institutional acquiescence in a process that an unmandated Ethiopian transitional government had itself engineered against the historical Ethiopian national interest, followed by ratification of a continuation of that process by a successor government whose specific electoral mandate to take such decisions had never been sought. The continental institution betrayed its own charter; the Ethiopian government of the day betrayed its own people *ultra vires* of any constitutional authority it possessed. Both betrayals worked together. The recovery of sovereign sea access today therefore requires not only the AU's institutional self-correction—the apology that this article calls for—but also a clear-eyed reckoning with the constitutional irregularity that produced the abandonment, and a commitment that Ethiopia's future foreign policy will not be conducted by leaders whose ideological or factional commitments are aligned against the country's strategic interest. Civic citizenship, the central thesis of this article, is the institutional architecture that prevents such betrayals from recurring: a state in which sovereign decisions are made through transparent constitutional process by leaders accountable to the entire Ethiopian electorate cannot, structurally, be turned over to the agendas of any single ethnic or factional formation.

The OAU's later acquiescence in the 1993 referendum—conducted under EPLF monopoly control after a thirty-year secessionist war financed by Nile-basin rivals and Cold War actors, accepted from the Ethiopian side by a transitional government without electoral or constitutional mandate to take a decision of that magnitude—was not the application of *uti possidetis*; it was its abandonment. The continental institution that exists to defend its members' territorial integrity *against* externally engineered fragmentation watched in silence as one of its founding members was dismembered through the precise mechanism the principle was designed to prevent.

The Algiers silence. The 2000 Algiers Agreement, brokered after the devastating 1998–2000 border war, addressed the land boundary in narrow terms but left the question of *sovereign sea access* entirely unresolved—a juridical silence that the Eritrea–Ethiopia Boundary Commission's mandate did not cover and that no subsequent legal instrument has filled. The Commission delineated a land border; it did not, and could not, extinguish a sea-access right that operated under a different legal source (Resolution 390(V)) and addressed a different legal question (sovereign maritime access, not territorial

demarcation between two states). The Algiers Agreement's silence is not the absence of an Ethiopian right; it is the absence of an instrument by which that right was alienated. Sea sovereignty therefore remains *juridically live*—unsettled, not resolved against Ethiopia—and capable of being asserted through any of the avenues international law makes available to a sovereign state.

The AU's owed apology. The AU therefore owes Ethiopia an apology—not as rhetorical flourish, but as a precise statement of the historical record. The continental organisation, charged with defending its founding charter, has been complicit in an international injustice for thirty-three years. Its current rhetorical defence of Eritrean sovereignty against any Ethiopian assertion of pre-existing rights inverts its own foundational principle. Any honest engagement with the Eritrea question must begin from this record, not pretend it does not exist.

The argument's force is operational. When Ethiopian diplomats, political leaders, and civil-society figures bring the case to international forums, they should not bring it as supplicants asking permission to alter "settled" borders. They should bring it as advocates exposing the AU's foundational hypocrisy and demanding the institutional self-correction that the historical record requires. *Avoiding annexation rhetoric is correct*—the goal is not to absorb Eritrea but to recover sovereign maritime access, with Eritrea's continued separate political existence preserved in any settlement—but accepting the AU's misapplied principle as binding is a strategic surrender that is neither legally required nor politically necessary.

8.3 The Strategic Window: Acting Before the Egyptian Cover Crystallises

The hardest strategic question Ethiopia faces in 2026 is whether to attempt recovery of sea sovereignty—through diplomacy reinforced by credible military preparation, or through the "attack, hold, and negotiate" posture analysed below—before the Egypt–Eritrea alignment crystallises into operational military cover. The case for urgency is grounded in the deteriorating strategic balance documented in §8: Eritrea has emerged from diplomatic isolation through the Cairo alignment, the Saudi rapprochement, the operational coordination with the Sudanese Armed Forces, and the deepening tactical engagement with Somalia's federal government. Reports indicate growing US engagement with Asmara as part of regional anti-Iran posturing, with the prospect—though not yet the immediate probability—of formal recognition as a US security partner. If Eritrea consolidates as a US-aligned state *or* as a node under credible Egyptian military cover, the operational space for any Ethiopian assertion of pre-existing rights—peaceful or coercive—contracts dramatically.

A serious analysis must engage the proposition that Ethiopia adopt an "attack, hold, and negotiate" posture: a limited military operation to secure the Doumeira–Beilul corridor (which includes Assab), establish defensive positions, and immediately enter negotiations from a position of physical control. *The objective is not annexation of Eritrea although that should remain on the table*; but it is the recovery of the sovereign maritime access that Resolution 390(V) preserved and that the AU's silence has permitted to be extinguished. The distinction matters legally, diplomatically, and operationally—and it is the rhetorical line that Ethiopian diplomacy must hold consistently. Ethiopia also has the sovreign right to respond to the encirclement threat as it see it fit.

The argument for urgency rests on four pillars. *First*, the legal foundation laid out in §8.2 is sufficient to defend the action as recovery rather than aggression. Diplomats can articulate this consistently across forums; international media can be supplied with the documentary record; AU obstruction can be answered with the OAU's own founding instruments. *Second*, Eritrean military capacity is structurally limited: a population under four million, an economy of less than $700 GDP per capita, no industrial

base, no air force capable of contesting Ethiopian air superiority, and a national service system whose conscripted personnel are demoralised and prone to desertion. The strategic asymmetry is real, but it shrinks the moment Egyptian military cover becomes operational—air defences at Assab, Egyptian fighter rotations through Asmara, naval visits that signal forward deployment. *Third*, the geopolitical moment is favourable while it lasts: Israel has validated boundary revision through Somaliland recognition; the United States is engaged at Berbera and would benefit from a friendly Ethiopian naval presence opposite Yemen; the UAE has commercial interests at Assab that would be better served by Ethiopian rather than Egyptian-influenced administration; the Saudi–UAE divergence weakens the balancing coalition's capacity to mount a unified response *provided* action precedes consolidation. *Fourth*—and decisively for the timing argument—the cost of action rises sharply once Egyptian troops, air defences, or naval assets are positioned at Assab in numbers that convert Ethiopian operational decisions into Ethiopian–Egyptian military confrontation. The window for unilateral recovery is the window before that crystallisation; once it closes, every option becomes more expensive, more bloody, and more uncertain.

The military strategist's view, accordingly, is that the operational window is open in 2026 and is closing through 2027–28 as Egyptian forces deploy at Assab and US–Eritrean engagement deepens. The strategist's professional duty is not to advocate war but to preserve the option of action while it remains executable. "Attack, hold, and negotiate" is the formula: a limited operation seizing the 200km Doumeira–Beilul corridor as the minimum viable sovereign access (which Eritrea has five times more to enjoy); defensive consolidation that establishes the territorial fact; and immediate negotiation that converts the fact into a settled outcome. The strategic logic is precise—the same logic that produced the 1967 Israeli seizure of Sinai and Golan as bargaining capital, the Turkish 1974 operation in northern Cyprus, the Russian 2014 seizure of Crimea, and many smaller cases. Operations that establish a territorial fact and then negotiate have a higher success rate than operations that attempt to negotiate without prior establishment. The strategist's instinct is not aggression; it is recognition that diplomacy without leverage is supplication. Ethiopia has the legal grounding and the international injustice of 1993 must be reversed.

The arguments against are equally serious and must be weighed honestly. *First*, the operation would push Eritrea decisively into the Egyptian orbit and accelerate exactly the encirclement Ethiopia is trying to prevent—unless action precedes that consolidation rather than triggers it, which is precisely the timing argument the strategist makes. *Second*, it would strain the convergent alignment: Israel and the UAE could provide diplomatic cover but would be reluctant to be seen as enabling territorial revision, particularly given precedent risks. The countermeasure is to frame the operation publicly as recovery of sovereign access rather than annexation, with Eritrea's continued separate political existence guaranteed in any post-operation settlement. *Third*, the AU would resist—but, as established in §8.2, the legal ground for that resistance is its own foundational hypocrisy, and Ethiopian diplomacy can name this without apology. *Fourth*, the Egyptian response could escalate beyond rhetoric: Cairo's encirclement architecture gives it the operational tools to retaliate through proxy mobilisation in Amhara, Tigray, Oromia, and the Somali region. This is the most serious risk, and it is the one that makes the internal civic compact a strategic precondition rather than a domestic preference. *Fifth*, and decisively for the argument of this article: a country whose internal politics is organised on ethnic lines cannot conduct a war of recovery that requires the cohesion of all major constituencies. Tigrayans will not fight for an Oromo-coded leadership's coastline; Amhara will not accept casualties for a state perceived as having abandoned them in Wollega; Oromo will not mobilise enthusiastically for an objective they perceive as a Pan-Ethiopian project that excludes their concerns. The military operation might succeed at the front; it would lose at home.

The military strategist's calendar therefore differs from the politician's. The strategist sees the window closing as Egypt deploys at Assab and as US–Eritrean tactical engagement deepens; the strategist's instinct is to act early, before the cover crystallises, and to negotiate from physical control. The politician sees the civic compact as not yet built, the macroeconomic depth as inadequate, the diplomatic preparation as incomplete; the politician's instinct is to wait until the preconditions are in place. Both are right within their professional remit. The reconciliation is in §8.5.

8.4 The Political Track: Civic Mandate, Global Capital, and Diplomatic Offence

The political track is not the alternative to the strategic option; it is the precondition that makes the strategic option survivable and, ideally, unnecessary. It rests on four operational pillars.

Civic mandate through the June 2026 election. The Red Sea sovereignty argument must be on the table during the campaign—not as Abiy's personal project, not as an Oromo-coded gambit, not as an Amhara nationalist's revanchism, but as a national strategic interest defensible across every constituency. Candidates who refuse to articulate a clear position on the coastline—those who hide behind ethnic mobilisation, those who treat the question as an Abiy political asset rather than a national right—should be exposed as ethnic entrepreneurs whose business model the civic-citizenship transition is designed to defund. The election raises the temperature of civic-citizenship politics against ethnic Bantustanisation precisely by forcing every candidate to take a position on the question that ethnic federalism has converted into factional manoeuvre. A government that wins on a coastline-recovery mandate, anchored in legal precision and cross-regional support, has standing that no internal opposition can credibly contest and that no external opponent can credibly delegitimise. This is the national dimension: voters use the ballot to translate the legal record into a political mandate.

Genuine democratic institutions and economic development. The coastline argument cannot be sustained politically by a state perceived as failing in its core domestic obligations. The June 2026 election must therefore be a referendum on a programme: ditch ethnic entrepreneurship in favour of impartial rule of law; build democratic institutions that survive any single leader; pursue economic development on a productive rather than patronage basis; reform the security sector under civilian oversight; deliver visible improvements in employment, prices, and basic services within the political horizon that the electorate can measure. A government whose domestic record can be defended has international standing; a government whose domestic record is contested at home cannot defend a sovereignty claim abroad. The two tracks—domestic civic consolidation and external sovereignty assertion—are not parallel; they are interdependent.

Global capital as defensive infrastructure. This is the dimension of strategy that Ethiopian political discourse has consistently underestimated, and it is the answer to the diplomatic isolation that Egypt's encirclement is designed to construct. Even in conditions of partial diplomatic isolation, Ethiopia can ensure that the safety, contracts, and freedom of movement of internationally invested capital—Israeli technology firms operating in agriculture and cyber, Emirati construction and logistics firms, Indian pharmaceutical and IT operations, Chinese infrastructure contractors, Turkish manufacturers, European development financiers, American mining and digital interests—become woven through the Ethiopian economy at scale. When global capital is invested across sectors and geographies, the constituencies that defend Ethiopia's stability *become* those capitals' constituencies in their own home countries. Egyptian diplomatic isolation can be moderated when Israeli, Emirati, Indian, American, Chinese, and Turkish firms each have material interests in Ethiopian operations that depend on Ethiopian sovereignty being

preserved. This is not philanthropy on the part of those firms; it is the operational principle that has protected Israel itself in the international system for decades, that protects Singapore, that has historically protected the small open economies of the Gulf, that even Vietnam now leverages against great-power pressure. Make Ethiopia indispensable to the supply chains, energy markets, technology pipelines, and capital flows of as many states as possible, and Ethiopia's enemies discover that their own economies are coupled to Ethiopian stability whether their politicians wish it or not.

The implication for the coastline argument is precise. A military strategist evaluating the recovery option must factor into the cost-benefit calculation the international response that Ethiopia's economic positioning will produce. The greater the global capital embedded in Ethiopia, the more deliberate the diplomatic isolation strategy must become for adversaries to construct, the higher its cost to those adversaries, and the narrower the window during which they can sustain it. Conversely, the less global capital is at stake, the easier Cairo's encirclement diplomacy becomes. The economic and diplomatic dimensions are inseparable from the military dimension; they are its enabling architecture. Ensuring the safety and freedom of movement of global capital is not separate from sovereignty—it *is* sovereignty in its modern, networked form.

Diplomatic offence rather than defence. If the June 2026 election is conducted under conditions that international observers can credibly recognise as democratic—this is the conditional, but it is achievable—Ethiopia gains the standing to take the AU and UN cases on the offensive. This is the international dimension. The argument is not that Ethiopia seeks permission to recover what was taken; it is that the AU has been complicit in ignoring its founding charter, that Resolution 390(V) is operative international law, and that the continued denial of Ethiopian sovereign sea access is a thirty-three-year-old international injustice that the continental organisation must acknowledge and correct. Ethiopian diplomacy can take this argument to every forum: AU summits, UN Security Council debates, Non-Aligned Movement meetings, BRICS engagements, AU–EU summits, Indian Ocean Rim Association sessions. If the message embarrasses the OAU/AU, that is not a strategic loss; it is a strategic gain. An institution exposed for its hypocrisy must either correct itself or lose legitimacy; either outcome serves Ethiopian interests better than the current diplomatic status quo, in which Ethiopian rights are silently denied while continental rhetoric celebrates a principle the institution has betrayed.

The diplomatic offensive does not require AU consensus to succeed; it requires only that the legal record be placed authoritatively into the international diplomatic discourse, where individual states—including, eventually, AU members embarrassed by their own institution's record—can position themselves on the merits rather than on continental reflex. A democratically mandated Ethiopian government, armed with the legal foundation and supported by the global capital architecture, has the standing to do precisely this.

8.5 Timing: The Strategist's Calendar versus the Politician's Calendar

The deepest analytical insight of this section is that the difference between the politician and the military strategist is timing. Both can agree on the destination—sovereign Red Sea access recovered for Ethiopia, by means consistent with international law applied to its own foundational terms—and both can agree on the conditions: cohesive internal political settlement, secured external alignment support, fiscal depth, legal-diplomatic preparation. They disagree about *when* the action becomes necessary or possible.

The military strategist's calendar runs on the deterioration curve of the strategic balance. Each month that passes brings Egyptian forces closer to operational positioning at Assab; each month deepens US tactical engagement with Asmara; each month allows the Saudi–Eritrean–Sudanese alignment to mature;

each month gives the Houthis more time to complicate Red Sea operations. The strategist's instinct, watching this curve, is that "attack, hold, and negotiate" is more achievable in 2026 than it will be in 2028, more achievable in 2028 than in 2030, and may become impossible thereafter. The strategist's professional duty is to flag the closing window and to prepare the operational option while it remains open. The strategist is not advocating war; the strategist is preserving the option that the politician needs as the credible threat behind any peaceful negotiation. Without that option, negotiation becomes supplication; with it, negotiation has weight.

The politician's calendar runs on the construction curve of the civic compact. The June 2026 election must be conducted, won on a Pan-Ethiopian programme, and converted into governmental legitimacy that can absorb strategic shock. The macroeconomic stabilisation must take effect: Birr stability, foreign-exchange depth, employment generation, inflation control. The diplomatic preparation must be completed: Israeli and Emirati neutrality at minimum, Saudi and Turkish acquiescence at maximum, Indian and American active support where attainable. The global-capital integration must reach the threshold at which adversary diplomatic isolation becomes prohibitively expensive. None of this is achievable in months; the politician's calendar is measured in eighteen to thirty-six months, not in weeks.

The reconciliation is operational, not philosophical. The strategist prepares the option; the politician builds the conditions; both work in parallel rather than sequentially. Ethiopia must, beginning now: (a) complete the legal-diplomatic preparation, including the public articulation of the AU complicity argument and the contingent-Italian-sovereignty argument that explodes the inheritance chain on which Eritrean exclusive coastal sovereignty rests; (b) conduct the June 2026 election as a referendum on civic citizenship and Pan-Ethiopian programme; (c) execute the macroeconomic stabilisation that gives the country fiscal depth; (d) build the global-capital integration that makes adversary isolation expensive; (e) maintain credible military preparation including conventional and asymmetric capability for the Doumeira–Assab–Beilul theatre; (f) pursue serious bilateral diplomacy with Asmara that offers a settlement consistent with sovereign Ethiopian access while preserving Eritrean separate political existence; (g) preserve the option of unilateral recovery if every other path is foreclosed by Eritrean intransigence reinforced by external cover.

The strategist's contribution is the willingness to act when the window narrows; the politician's contribution is the construction of the conditions under which action—if required—is sustainable. The catastrophic miscalculation lies in either professional taking the entirety of the question. A strategist acting without the politician's foundation produces a war the country cannot survive at home; a politician acting without the strategist's preparation surrenders the leverage that makes any negotiated outcome possible. The synthesis is the only mature posture: prepare for what may be necessary while building the conditions under which it may not be.

The order of operations matters. If the June 2026 election produces a Pan-Ethiopian civic mandate, the political conditions advance rapidly through 2027; if the global-capital integration deepens through that period, the diplomatic isolation cost rises for adversaries; if the legal-diplomatic offensive is sustained, the AU complicity argument enters international discourse with weight. By 2027–28, the politician's preconditions converge with the strategist's still-open window. That convergence is the moment of maximum Ethiopian leverage—the moment at which Asmara faces the choice between a negotiated settlement that preserves Eritrean political existence on terms that include Ethiopian sovereign access, or the confrontation that the strategist has prepared to win.

If Asmara, reinforced by Egyptian cover, refuses negotiation in that window, the strategic case for action becomes both more urgent (because the cover continues to mature) and more sustainable (because the political conditions are in place). The strategist's calendar and the politician's calendar align at that

point; the action that was premature in 2026 becomes available in 2027–28 with the foundation that makes it survivable.

Without sea access sovereignty by any means—peaceful or coerced, negotiated or seized, immediate or eventual—Ethiopia is a failed state in slow motion, prone to fragmentation under cumulative external pressure. The four singular interests collapse together if the coastline is permanently lost: GERD becomes a stranded asset without secure export logistics, economic development becomes a function of others' goodwill, internal unity becomes harder to defend when the country has no projection capacity, and Red Sea sovereignty itself disappears as a coherent objective. The window is real. The calendar is short. The civic compact is the precondition for both tracks.

8.6 The Post-Iran Contest for Sunni Islamic Leadership

Iran's degradation under Operation Epic Fury has, paradoxically, opened a contest for Sunni Islamic leadership that may pose a more durable challenge to the Abraham Accords than the Iranian Shia revolutionary model ever did. With Tehran's revolutionary legitimacy narrative discredited by military defeat, the ideological space for "authentic Islamic governance" is now contested among three Sunni candidates—Turkey, Saudi Arabia, and Egypt—each with substantial institutional and demographic resources, each with regional ambitions that include the Horn, and each with an incentive to position itself as the alternative to the perceived Israeli-American hegemony that the Accords represent.

Turkey's Erdoğan has long pursued a neo-Ottoman framing of Turkish Sunni leadership, anchored in religious diplomacy, the Diyanet's transnational reach, defence-industrial export to Muslim-majority states, and direct security engagement (notably in Somalia, Libya, Qatar, and across the Sahel). The TF-X fifth-generation fighter programme, the Bayraktar drone export portfolio, and the Turkish military presence in Mogadishu give Ankara concrete capabilities that ideological projection alone could not produce. Saudi Arabia, freed by Iran's defeat from the most acute Shia challenge, retains custodianship of the Two Holy Mosques and a vast network of religious institutions, but its under-MBS modernisation agenda is structurally in tension with the conservative Sunni constituencies that the legitimacy claim requires. Egypt, through Al-Azhar, holds the historical institutional centre of Sunni religious authority; combined with Cairo's military capacity and its position as the Arab world's most populous state, Al-Azhar's authority gives Egypt a leadership claim that neither Ankara nor Riyadh can replicate.

The realistic scenario is not unified Sunni opposition to the Accords but *competitive triangulation*, in which the three candidates simultaneously cooperate against shared threats (Israeli regional hegemony, Iranian residual influence) and compete against each other for regional positioning. The competition matters for Ethiopia because the Horn becomes one of the contest's principal arenas: Turkey's investment in Somalia, Saudi–Emirati positioning in Sudan, and Egypt's encirclement architecture each instrumentalise Horn dynamics for the broader leadership claim. Reconfiguration is already visible in Somalia and Somaliland (Turkey–Qatar–Somalia versus Israel–UAE–Somaliland), in Eritrea (Egyptian–Saudi alignment with Asmara), and in Sudan (Egyptian–Saudi support for the SAF versus UAE support for the RSF). Each axis pulls the Horn into a wider Sunni-leadership contest in which Ethiopian fragmentation produces opportunity for one or more candidates.

The strategic implication for Ethiopia is threefold. *First*, the convergent alignment cannot be relied upon to remain coherent indefinitely: the UAE and Saudi Arabia will compete; Israel and Turkey have direct technological and ideological rivalry; the United States will calibrate its engagement to its priorities, not Ethiopia's. The window for converting the alignment of winners into structural Ethiopian gains is short. *Second*, the Sunni leadership contest gives every Horn actor an external patron with deep pockets

and ideological motivation, intensifying the proxy dimension of any Ethiopian internal conflict. If the Egypt–Eritrea axis deepens, Asmara's resources for cultivating Tigrayan or Amhara dissident networks expand. If Turkey expands its Somalia footprint, the operational space for proxy support to Ethiopian Somali regional ambitions grows. Ethiopia's defence is not external alignment alone but the internal cohesion that makes proxy cultivation unprofitable.

Third, and often underweighted in Ethiopian strategic discussion: Ethiopia's Sunni Muslim population—approximately one-third of the national total, distributed across Amhara, Afar, Oromo, Harrari, Somali, Silte, and other communities—is a significant constituency that the Sunni leadership contest could attempt to mobilise as a vector of external influence. Saudi religious diplomacy through scholarship programmes and mosque construction, Turkish Diyanet outreach, Egyptian Al-Azhar networks, and Gulf charitable funding all have established channels into Ethiopian Muslim institutions that pre-date the current geopolitical moment. None of this is inherently hostile; legitimate religious exchange is a feature of any open society. But in the context of the Sunni leadership contest, those channels become potential vehicles through which external actors can frame Ethiopian Muslim grievance—whether real or constructed—in opposition to the Ethiopian state, its Christian-coded political symbolism, or its alignment with Israel through the convergent architecture. The risk is not Sunni Ethiopian disloyalty—Ethiopian Muslim communities have historically demonstrated remarkable fidelity to the Ethiopian polity, and the country's tradition of inter-faith coexistence is among the deepest on the continent—but external instrumentalisation of religious identity as one more fracture line alongside ethnic ones. The countermeasure is the same as the countermeasure to ethnic fragmentation: a civic-citizenship architecture that treats every Ethiopian, regardless of faith or region, as an equal participant in the constitutional order, rejects identity-coded patronage in religious as in ethnic form, and ensures that Ethiopian Muslim voices are visibly represented in foreign-policy formulation rather than addressed through paternalistic mediation. The Hajj logistics, the management of Muslim educational institutions, the appointment of Muslim figures to senior diplomatic and economic positions, and the visible inclusion of Muslim Ethiopian perspectives in the convergent-alignment relationships all become strategic instruments rather than merely domestic religious-policy matters.

Saudi Arabia as bridge, not adversary. A specific corollary follows. Ethiopian strategic discourse has, in places, treated Saudi Arabia as functionally aligned with Egypt against Ethiopian interests. This reading underestimates the Saudi–UAE divergence's character and overestimates the depth of Saudi–Egyptian alignment. The Saudi–UAE rift, as analysed in Part 2, has elements of personality clash—MBS's pre-emptive activism in tension with the Saudi state's traditional de-escalatory caution, and personal disagreements between MBS and MBZ over Yemen, Sudan, and the management of the Iran question—alongside genuine doctrinal differences. Personality clashes are reversible; doctrinal divergences need not be permanent. Saudi Arabia under the right diplomatic engagement could become a bridge actor between the convergent and balancing alignments, rather than a fixed member of the latter. Riyadh's developmental-state interest in Ethiopia is real (Saudi remittances from Ethiopian workers, Saudi investment opportunities in Ethiopian agriculture and energy, Saudi religious-institutional connections), and Saudi religious authority gives it a unique capacity to legitimise rather than oppose Ethiopian sovereign assertions in ways that Egypt cannot. The strategic posture should therefore be *neither alignment with Saudi against Egypt nor passive acceptance of Saudi–Egyptian alignment against Ethiopia*, but active cultivation of Saudi neutrality at minimum and Saudi acquiescence at maximum on the maritime question. The BRICS framework, of which Saudi Arabia, Egypt, the UAE, and Ethiopia are all members, provides a multilateral venue in which Ethiopian diplomacy can engage Riyadh on equal terms, on shared developmental interests, and on the global-South positioning that the BRICS

architecture privileges. Ethiopia—ideally through Abiy Ahmed if the June 2026 election produces the mandate, but more durably through institutionalised foreign-policy capacity—should be a bridge, not a partisan, in the Sunni leadership contest. A bridge actor extracts more value from each adjacent pole than a partisan extracts from a single one; an Ethiopia that is necessary to Saudi as much as to Israel, to Egypt as much as to the UAE, to Turkey as much as to India, holds the strategic position that the convergent alignment alone cannot provide.

9 The Economy: When Politics Is Driven by the Birr

No analysis of Ethiopia's internal constraint can ignore the fact that economic dynamics are, increasingly, the medium through which political outcomes are produced. The Birr's depreciation, foreign-exchange scarcity, inflation, debt service obligations, and the scale of investment required to absorb the demographic bulge—each translates into political pressure that no leadership can ignore and that no civic settlement can endure without addressing.

9.1 The Macroeconomic Pressure

Ethiopia's macroeconomic trajectory through 2024–26 has combined high nominal growth with severe imbalances. The mid-2024 currency liberalisation—which devalued the Birr by approximately fifty per cent against the US dollar—was structurally necessary but politically painful: import prices spiked, dollar-denominated debt service rose in Birr terms, fuel and fertiliser inflation transmitted directly into food prices, and household real incomes contracted across every region. The reform was a precondition for the IMF programme and for restoring access to international capital markets, but its distributional effects have been borne disproportionately by urban consumers and rural households dependent on imported inputs—which is to say, by the demographic majority that ethnic entrepreneurs are positioned to mobilise against the federal government.

The fiscal arithmetic remains tight. External debt service has resumed after the 2023–24 standstill; foreign-exchange reserves remain below comfortable levels; export revenues—coffee, sesame, gold, electricity, horticulture—have improved but cannot yet finance the import bill of a 130-million-strong economy that is industrialising. Foreign direct investment, which the Abiy government has cultivated assiduously, has rebounded from the 2020–22 trough but remains concentrated in agriculture, telecoms, and selected manufacturing rather than in the broad-based industrial deepening that the demographic trajectory requires. The Hawassa Industrial Park model demonstrated the principle; the macroeconomic conditions under which that model can be replicated at scale across multiple sites have not yet been fully restored.

9.2 Why the Economy Drives Politics, Not Vice Versa

The political consequence is that economic outcomes increasingly determine political legitimacy, rather than political legitimacy creating space for economic reform. A young Ethiopian entering the labour market in 2026 confronts an economy in which formal-sector employment growth is below labour-force entry; in which inflation has compressed real wages even where employment exists; in which urban housing costs have risen faster than incomes; in which rural smallholder agriculture is squeezed between input cost inflation and output price suppression; in which emigration remains the rational individual response for those who can afford it and the desperate response for those who cannot. The demographic bulge that should be Ethiopia's strategic asset becomes, under these conditions, the political tinder that ethnic entrepreneurs ignite.

The implication is that the four singular interests cannot be pursued without an economic stabilisation programme that delivers measurable improvement in household conditions within the political horizon—the eighteen to twenty-four months that span the June 2026 election and its immediate aftermath. The geopolitical architecture's promise of Israeli technology and Emirati capital is real but slow; investment cycles measure in years, not months. What is needed in parallel is fiscal stabilisation that controls inflation, exchange-rate management that prevents further Birr collapse, fuel and fertiliser subsidy targeting that protects the most exposed households, and visible employment generation through the industrial parks, agricultural processing zones, and infrastructure projects that the macroeconomic reform programme is designed to enable.

9.3 Economy as the Multiplier of Ethnic Mobilisation

The most important political fact about the Ethiopian economy in 2026 is that economic discontent is being channelled through ethnic categories. A young Amhara man unable to find work in Addis Ababa interprets his predicament as Oromo capture of the federal economy. A young Oromo man unable to find work in Bishoftu interprets the same condition as elite betrayal of the constituency that brought Abiy to power. A Tigrayan trader unable to access foreign exchange interprets the situation as deliberate federal punishment. None of these interpretations is wholly fabricated; each contains elements of truth. But all of them mistake structural macroeconomic conditions for ethnic conspiracy, and ethnic entrepreneurs profit from the conversion. The crumbs are interpreted as ethnic injury; the bananas distributed to connected insiders confirm the conspiracy reading; the structural reform that would benefit everyone is rejected as an elite plot against "our" constituency.

The implication is that any civic-citizenship programme must include, as its first pillar, a credible economic narrative that explains the macroeconomic situation to every constituency in the same language: the Birr was overvalued for years; the devaluation was painful but necessary; foreign-exchange management is improving; investment is returning; employment generation requires the convergent alignment to be cashed in over the next thirty-six months; the alternative is permanent stagnation. This narrative cannot be delivered by a leadership perceived as ethnically coded. It can only be delivered by a coalition that demonstrably represents the country as a whole, and it cannot be received by constituencies that have not yet rejected the ethnic-entrepreneur framing of their economic experience.

9.4 The Strategic Pivot: From Patronage Economy to Productive Economy

The deeper economic transition required is from the patronage economy described in §2—in which political access determines economic outcome—to a productive economy in which merit, enterprise, and rule of law determine outcomes. This transition is not a luxury reform deferred to a more comfortable moment; it is the macroeconomic precondition for converting the convergent alignment's offer into structural national gain. Israeli technology cannot be deployed efficiently through Ethiopian firms whose competitive advantage is political connection rather than productive capacity. Emirati capital cannot generate broad-based employment through industrial parks whose contracts are awarded on ethnic-coded criteria. American security infrastructure at Berbera cannot pay strategic dividends to an Ethiopia whose elite captures basing-related logistics revenues for ethnically coded networks. The same factional capture that converts political authority into ethnic prize converts economic opportunity into ethnic patronage—and forfeits the structural transformation that the demographic and geopolitical moment makes possible.

The pivot from patronage economy to productive economy is therefore an extension of the civic citizenship transition, not a separate reform. Both require the same political coalition, the same institutional

architecture, and the same break with the ethnic-entrepreneur class. The June 2026 election is the constitutional moment in which this coalition either consolidates or fragments, and the outcome of that moment will determine whether Ethiopia's demographic trajectory becomes the foundation for regional dominance or the trigger for state failure.

10 The 1 June 2026 National Election: A Mandate for the Programme, Not the Person

The 7th general election of the Federal Democratic Republic of Ethiopia is scheduled for 1 June 2026. The National Election Board of Ethiopia (NEBE), under the chairpersonship of Melatwork Hailu, has set out a detailed timetable: candidate registration opened on 9 January 2026 and closed on 22 February (extended); voter registration ran from 7 March to 7 April; the campaign period extends to 27 May; polling occurs on 1 June; provisional results are expected by 11 June.[20, 21] A total of 10,934 candidates have registered: 2,198 contesting seats in the House of Peoples' Representatives, 8,736 contesting regional council seats, drawn from 47 political parties (including two coalitions and one front) and 73 independent candidates. The NEBE has designated 40,448 polling stations, categorised by security risk into green, yellow, and red zones—the classification itself an admission that significant parts of the country are not currently in conditions that permit a fully open vote.[21]

10.1 What the Election Can and Cannot Deliver

Realism about the election begins with what it cannot deliver. It cannot, by itself, end the Amhara conflict or fully integrate Tigray into the federal framework; it cannot reverse the macroeconomic adjustment underway; it cannot solve the Eritrean strategic problem or extract Egyptian acceptance of GERD. It cannot, on its own, undo the institutional erosion of the past several years or restore an opposition political ecosystem that has been weakened by repression, organisational thinness, and the coercive environment of consecutive wars. Major opposition parties have raised legitimate concerns about the conditions under which the vote will be held; politicians remain in detention; access to constituencies in Amhara, parts of Oromia, and Tigray remains uneven. Any honest assessment must acknowledge that the election is being held in conditions far from ideal.

What the election *can* deliver—and what nothing else available to Ethiopians can deliver in the same timeframe—is a constitutional moment in which the country's voters can articulate, through their choices, whether the next political phase will be organised around programmes or around identities. The choice is not between Abiy and an alternative who can already deliver the four singular interests; no such alternative is on the ballot. The choice is between coalitions whose composition and mandate will determine whether the policies pursued after June can be Pan-Ethiopian or will revert to ethnic-bargained variants of the same dispensation that has failed for thirty years.

10.2 The Programmatic Test for Every Candidate

The civic-citizenship test for every candidate, in every constituency, in every party, is whether they compete on programme or on identity. The questions that ought to organise the campaign are concrete and answerable: What is your position on GERD revenue distribution and the fiscal institutions required to make it transparent? What is your position on the sovereign coastline—which means, will you support negotiation to its conclusion, will you support coercive escalation if negotiation fails, and what conditions

do you set for either? What is your position on the convergent alignment with Israel, the UAE, the United States, and India, and what specific gains do you expect Ethiopia to extract from it? What is your position on the Birr stabilisation programme, on fuel and fertiliser subsidies, on industrial-park siting, on the targeting of foreign investment? What is your position on the security sector, civilian oversight, and accountability for past violations? What is your position on the constitutional framework of ethnic federalism: revision through deliberation, retention without reform, or replacement by a civic citizenship architecture? What is your position on the Wollega violence, on Amhara reconstruction, on Tigray reintegration, on the rights of internally displaced populations across every region?

Candidates whose answers are recognisable across constituencies—the same answer to an Amhara, Oromo, Tigrayan, Somali, Afar, or southern voter—are the candidates competing on programme. Candidates whose answers shift with the constituency they are addressing, who promise different things to different identities, are the ethnic entrepreneurs whose business model the civic-citizenship transition is designed to defund. The voter's task in June 2026 is to detect this distinction with discipline and to vote on it.

10.3 What a Pan-Ethiopian Mandate Would Mean

A parliamentary outcome in which the winning coalition's majority is anchored across multiple regional constituencies—Amhara, Oromia, southern nations, urban Addis Ababa, with meaningful representation from Tigray, Somali, Afar, and other peripheral regions—would constitute a Pan-Ethiopian mandate. Such an outcome would change the strategic calculation in three ways. First, it would weaken the political logic of ethnic-coded governance by demonstrating that programmatic appeal works at the ballot box, removing the survival incentive that drove the retreat into the ethnic cloak. Second, it would give the resulting government the legitimacy to pursue the four singular interests as a national programme rather than as factional gambits: GERD revenue rules, coastline diplomacy, the convergent alignment, and the economic stabilisation programme could each be defended as expressions of national will rather than executive caprice. Third, it would change the external bargaining position: a Prime Minister who can plausibly claim to speak for 130 million people across every major region negotiates differently with Cairo, Asmara, Riyadh, Ankara, Tel Aviv, Abu Dhabi, and Washington than one whose authority is contested at home.

A parliamentary outcome in which the winning coalition's majority is built primarily on Oromo-bloc voting, supplemented by clientelist returns in regions under federal administrative pressure, would not constitute such a mandate—regardless of its constitutional validity. It would reproduce the ethnic-bargain politics that has failed for three decades, and it would invite exactly the encirclement and proxy cultivation that Egypt's strategy is designed to exploit.

10.4 The Voter's Strategic Choice

The voter's strategic choice is therefore not who governs but *how* the next government governs. Ethiopians who refuse to vote on ethnic lines, who support candidates competing on programme, who hold whatever coalition wins to a civic compact rather than an ethnic bargain, are the political force without which the four singular interests cannot be pursued. Cynics will say that the system is too captured for individual choice to matter. The answer is that captured systems are sustained by the cumulative passivity of those who are captured; they are dismantled by the cumulative refusal of those captures. Civil disobedience through the withdrawal of consent—the refusal to be mobilised against fellow Ethiopians by entrepreneurs who profit from the mobilisation, the refusal to interpret structural macroeconomic

adjustment as ethnic injury, the refusal to vote for candidates whose appeal is to identity rather than to programme—is not a passive abstention but the active construction of a different political order.

If the election is conducted under conditions that Ethiopians judge insufficient, if the count is contested, if the winning coalition lacks legitimate breadth—the response cannot be ethnic-coded mobilisation against the result, because that response is precisely the trap that the encirclement strategy is designed to spring. The response must be civic: programmatic political organisation across ethnic lines, sustained civic engagement to expand the institutional foundations that the next election cycle will require, refusal to accept the ethnic-entrepreneur framing of any electoral disappointment. The window for this response is open now; it will close if the encirclement matures before the civic compact is built.

11 From Ethnic Bargains to Civic Citizenship

Ethiopia's strategic objective must be a civic bargain that protects individual rights irrespective of ethnic origin, decentralises administration without enabling warlordism, and constrains rent extraction. Such a bargain requires credible rule of law, security sector accountability, and a fiscal settlement that reduces the political salience of identity by improving material prospects.[4]

The pathway demands enforceable citizenship: an impartial judiciary that resolves disputes without ethnic bias; programme-based political parties that compete on policy rather than identity; civilian oversight of the military and security services; minority safeguards that protect vulnerable groups from majoritarian predation; and transparent fiscal norms that ensure GERD revenues, corridor investments, and development finance reach citizens rather than patrons. These reforms bind actors, transmuting ethnic mobilisation into consensus and surmounting the narratives that threaten diverse groups.

These reforms are not liberal aspirations disconnected from strategic reality. They are the preconditions for pursuing the four singular interests. A state that cannot distribute GERD electricity equitably cannot sustain the civic contract that GERD was designed to embody. A state that cannot negotiate coastline recovery through unified institutions will either fail to recover it or will recover it in a way that benefits a faction rather than the nation. A state that cannot channel Israeli technology and Emirati capital into broad-based development will squander the alignment of winners on patronage. And a state that cannot achieve internal unity will be dismembered—not necessarily through formal secession but through chronic insecurity, economic stagnation, and de facto fragmentation in which 130 million people are governed by competing oligarchies that external patrons arm, finance, and exploit.

The transition from ethnic bargaining to civic citizenship is not a luxury reform to be deferred until conditions are easier. It is the most urgent strategic action available to Ethiopians today, because the geopolitical architecture is moving with extraordinary speed and its rewards accrue only to states that can negotiate as units. Every day that passes with Ethiopian politics organised on ethnic lines is a day in which the convergent alignment's offer of partnership remains on the table, the balancing coalition's offer of fragmentation remains on the table, and the citizens of Ethiopia continue to be reduced to spectators while their ethnic entrepreneurs trade their birthright for personal gain. The window for civic consolidation is open now because the external environment is favourable; it will close when one or more external actors decides that a fragmented Ethiopia serves its interests better than a unified one.

12 Conclusion: The Internal Foundation for External Ambition

Ethiopia's four singular interests—GERD, Red Sea sovereignty, economic development, and internal unity—are mutually reinforcing only when pursued by a state with institutional credibility. The geopo-

litical architecture analysed across this series is the most favourable external environment Ethiopia has faced in its modern history, but the Hexagon, the alignment of winners, and the legal chain from Wuchale through Resolution 390(V) cannot be converted into prosperity if the internal condition remains fractured, personalised, and ethnically coded. The encirclement is not theoretical—15,000 Egyptian troops in Somalia, military access at Assab and Doraleh, the Sunni leadership contest pressing Ethiopia's Muslim communities as one more potential fracture line, and Eritrea's emergence from isolation collectively register the closing of the window in which civic consolidation can be converted into strategic dominance. The 1 June 2026 election is the constitutional moment. Three propositions follow from the analysis. *First*, the choice is between two operational paths: continued ethnic entrepreneurship that delivers bananas to entrepreneurs and crumbs to followers while the nation is dismembered piece by piece; or civic citizenship that defunds the patronage networks and converts the demographic and economic trajectory into the regional dominance that Ethiopia's geography destines. *Second*, the practical leadership question is not who Ethiopia would choose with a deeper bench of alternatives, but which available political actor can be held to a Pan-Ethiopian programme by an electorate that votes on substance rather than identity. The argument for engaging Abiy strategically rests on the absence of a credible alternative coalition; the argument against permitting any leader unconditional power rests on the institutional discipline that civic citizenship requires. *Third*, the strategic synthesis developed in §8.5—legal-diplomatic offence exposing Italian-claim contingency and AU complicity, civic mandate built through the election, macroeconomic stabilisation, global-capital integration, credible military preparation, and serious bilateral diplomacy with Asmara—reconciles the strategist's closing window with the politician's construction calendar around the 2027–28 convergence point.

Saudi Arabia, often miscast in Ethiopian discourse as a fixed adversary aligned with Egypt, should be engaged as a bridge actor through BRICS and bilateral channels: the Saudi–UAE divergence has elements of personality clash that diplomacy can manage, and Riyadh's developmental and religious-institutional interests offer Ethiopia leverage that partisan alignment with the convergent bloc alone cannot provide. The Sunni leadership contest pressing Ethiopia's Muslim citizens through external religious networks must be answered the same way the ethnic fracture map is answered: by visible inclusion of Muslim Ethiopian voices in foreign-policy formulation, the Hajj logistics, the convergent-alignment relationships, and the institutional life of the state, on the constitutional footing that civic citizenship provides.

Ethiopians who hold an ounce of Ethiopianness, who carry the dignity of the Adwa generation, who understand that GERD was built with their pennies and that the coastline was never legitimately surrendered, must choose now: bananas for the few, or sovereignty for the many. The transition is not optional; it is the decisive strategic variable on which everything else depends.

Part IV turns to the decisive question: Assab, the sovereign coastline, and the endgame—examined as a sovereignty-and-deterrence problem that demands both international mediation and domestic civic consolidation.

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