

Arda Yakıcı

Director/Consultant

Nexus Energy Resources

EVALUATION NOTE

TÜRKİYE'S STRATEGIC ENGAGEMENT IN THE HORN OF AFRICA¹

Over the past decade, Türkiye has steadily expanded its influence in the Horn of Africa by combining diplomacy, economic investments, and military engagements, deepening its presence in the region. Situated at a critical point for global trade routes and believed to hold significant untapped energy resources, this region is becoming increasingly important in Türkiye's broader geopolitical strategy. As Türkiye strengthens its influence in key ports such as Mogadishu and Hobyo, it is positioning itself as a key player in East Africa, taking significant steps to secure strategic trade routes through the Bab el-Mandeb Strait and gain access to potentially valuable energy resources. As the region becomes a focal point for international competition, Türkiye's actions seem set to continue reshaping the geopolitical dynamics of the Horn of Africa.

With these goals in mind, Türkiye's diplomatic efforts in the region have been integral to solidifying its role and navigating the complexities of East African politics.

Diplomatic Efforts and Regional Influence

Türkiye's diplomatic foray into the Horn of Africa has been nothing short of ambitious. Since 2011, it has rapidly expanded its footprint, particularly in Somalia, where it established its largest embassy and became a major player in the country's reconstruction efforts. President Erdoğan's visit to Mogadishu in 2011 set the tone for a robust partnership, positioning Türkiye as a key ally in Somalia's development and security scene.

The Horn of Africa holds immense geopolitical importance, sitting near the Bab el-Mandeb Strait—a crucial artery for global trade, with over 10% of international commerce passing through these waters. Securing influence over East

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African ports is vital for any nation aiming to strengthen its global reach, and Türkiye is no exception. However, the region's underlying tensions, particularly the long-standing disputes between Ethiopia and Somalia, have put Türkiye's diplomatic capabilities to the test.

A key factor intensifying the situation is the role of Somaliland—a self-declared, but unrecognized, independent region. Somaliland has established its own economic partnerships, most notably with the UAE, which in 2016 signed a \$442 million deal to develop Berbera Port, transforming it into a strategic hub in the Horn of Africa. The UAE also established a military base in Berbera, escalating the region's already delicate situation. Ethiopia's 2024 Memorandum of Understanding (MoU) with Somaliland—granting it access to the coastline—further complicated matters, straining relations with Somalia and resulting in the expulsion of Ethiopia's ambassador.

Faced with these tensions, Türkiye stepped in as a mediator, hosting two rounds of talks aimed at de-escalating the situation. The third round, initially scheduled for September 2024, was cancelled for the time being due to escalating tensions between the parties, leading Türkiye to deem it more appropriate to hold separate discussions with each party first. These talks are critical not just for regional stability, but for Türkiye's standing as a diplomatic force in the Horn.

At the same time, Türkiye is actively engaging the international community through multilateral efforts. In October 2024, Türkiye collaborated with key global players such as the United States, United Kingdom, Qatar, and the UAE as part of the Somalia Quint Group, calling for dialogue to reduce tensions and reaffirming support for the sovereignty of nations in the Horn. Balancing direct engagement with a broader multilateral approach, Türkiye continues to test its diplomatic capabilities in navigating these complex regional dynamics, with its effectiveness in resolving the Somalia-Ethiopia tensions remaining a critical benchmark for its long-term influence in the region.

As Türkiye strengthens its diplomatic presence through multilateral engagements, its focus on energy security has become equally vital in shaping its long-term strategy in the Horn of Africa.

Energy Security: Expanding Horizons and Competition

Securing access to energy resources has been a central pillar of Türkiye's strategy in the Horn of Africa. A milestone was reached in early 2024, when Türkiye signed a landmark oil and gas exploration deal with Somalia securing exclusive rights to explore and produce hydrocarbons in **three offshore blocks**. Somalia's estimated 30 billion barrels of oil reserves remain largely unexplored due to decades of political instability.

Türkiye deployed its seismic vessel **Oruç Reis** to Somali waters in October 2024, which will conduct extensive surveys, marking the beginning of what could be a game-changing venture. Accompanied by naval frigates for security, the deployment highlights the strategic importance Türkiye places on energy security in the Horn, not only for economic gain but as part of its broader geopolitical ambitions.

However, Türkiye is not sailing these waters alone. In 2022, the Somali government signed an exploration agreement with US-based company for seven offshore blocks, with drilling expected to begin in 2025. This was followed by the gradual re-engagement of legacy players like Shell and ExxonMobil, who have been assessing the region's potential since 2019. In March 2024, another US-based company signed an agreement for additional offshore exploration. These agreements underscore the increasing international momentum around Somalia's energy sector, making it a focal point for global investments. For Türkiye, staying

ahead in this race will require deft diplomacy and the careful management of competing interests.

Beyond Somalia, Türkiye is also eyeing energy projects in **Djibouti** and other East African nations, reinforcing its long-term goal of becoming an energy hub that connects Africa's resources to European and Asian markets.

As Türkiye's energy ambitions extend beyond Somalia, its broader investments in infrastructure and trade continue to solidify its influence in the region.

Trade and Investments: A Strong Footing

Turkish companies have consistently demonstrated their expertise in infrastructure development across the Horn of Africa. Since 2014, Turkish firms, notably the **Albayrak Group**, have managed Mogadishu's airport and port, both critical economic lifelines for Somalia. The **Port of Mogadishu**, Somalia's largest harbour, is being upgraded and expanded under Turkish management, with the aim of increasing its capacity to handle oil and gas exports. This effort positions Mogadishu as a key hub for Somalia's offshore energy resources, with Türkiye's experience in port management playing a crucial role in developing the infrastructure required for reliable export routes.

In 2019, the Hobyo Port project was initially awarded to Qatar as part of its regional investment strategy. Following an agreement announced in October 2024, Turkish conglomerate **Metag Holding** has taken over the project with an 80-year contract signed with the **Hobyo Investment Company**. Metag is set to construct the port with an estimated \$70 million investment, scheduled for completion within three years. This shift signifies Türkiye's expanding influence in Somalia's infrastructure sector, aligning with its broader strategic goals in the Horn of Africa.

The strategic location of **Hobyo Port** along the Indian Ocean is pivotal, especially as Somalia explores its offshore oil and gas reserves. Türkiye's involvement in both the **Mogadishu** and **Hobyo** ports provides critical infrastructure for the transportation of hydrocarbons to global markets, strengthening its role in the region's energy logistics. Control over Hobyo, in particular, allows Türkiye to compete with regional players such as the UAE, balancing rival investments in Somaliland and Puntland, and enhancing its influence over East African trade and energy routes.

By 2023, Turkish investments across Africa had soared to \$85 billion, reflecting the country's deep economic integration with the continent. In addition to its focus on Somalia, Türkiye has expanded its reach into sectors such as agriculture and fisheries in **Djibouti**. However, Türkiye faces stiff competition from the UAE and China for control over Djibouti's strategic ports, posing challenges to its economic ambitions in the region.

While economic investments continue to grow, Türkiye's strategic presence in the region is also reinforced through military cooperation, ensuring the security of its assets and influence.

Security Cooperation and Military Presence

Türkiye's military engagement in the Horn of Africa goes hand in hand with its economic and diplomatic initiatives. In Somalia, Türkiye operates its largest overseas military base, which serves not only as a training ground for Somali forces but also as a safeguard for Türkiye's infrastructure investments, including Mogadishu's port and airport, which are constantly under threat from extremist groups like Al-Shabaab.

In 2024, Türkiye bolstered its security ties with Djibouti, signing a defence agreement to enhance security along the **Red Sea** and **Bab el-Mandeb Strait**. This agreement underscores Türkiye's commitment to safeguarding its maritime interests and ensuring the smooth flow of global trade through one of the world's most strategic waterways.

Evaluation of Success and Areas for Improvement

While Türkiye has established itself as a key mediator in the Ethiopia-Somalia dispute, tensions over Somaliland remain unresolved. To strengthen its mediation efforts, Türkiye has been working in cooperation with the international community, including through multilateral platforms such as the Somalia Quint Group. However, involving additional regional stakeholders could foster a more balanced and sustainable solution. Given Egypt's vested interest in the region, particularly due to its rivalry with Ethiopia over the Grand Ethiopian Renaissance Dam (GERD), Türkiye could also leverage its improving relationship with Egypt since 2023 to facilitate more comprehensive negotiations that address the interests of all parties involved.

Türkiye holds a unique advantage through its combination of military presence, economic investments, and long-standing diplomatic ties, particularly in Somalia. Its ability to blend soft power—such as development aid and infrastructure projects—with hard power, demonstrated by its military base in Mogadishu, provides a competitive edge. This multifaceted approach not only strengthens Türkiye's position but also enables it to balance regional rivalries, positioning itself as a key player in East Africa's geopolitical landscape.

However, Türkiye's involvement in the Horn of Africa comes with challenges, particularly with growing competition over key ports in Somaliland and Djibouti, as well as the scramble for Somalia's energy resources. Success in mediating the Somalia-Ethiopia tensions will serve as a critical test of Türkiye's effectiveness in conflict resolution. While Türkiye develops its strategies for mediation, energy exploration, and economic diversification, it seems poised to play a significant role in shaping the region's future geopolitical landscape.