

Sudan, the Red Sea, and Gulf Rivalries: How Regional Competition is Reshaping Security and Governance in the Horn of Africa

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Summary

Purpose: This article examines how Gulf rivalries are reshaping security dynamics and governance structures in Sudan, positioning the country as a central arena within Red Sea geopolitics and broader Horn of Africa dynamics. It explores the ways in which external competition interacts with domestic fragility to produce new patterns of authority and conflict that extend far beyond Sudan's borders.

The paper demonstrates that Gulf patronage reinforces fragmented sovereignty, empowers hybrid security arrangements, sustains war economies through gold smuggling and selective military support, and generates significant spillover effects across the Horn of Africa. By early 2026, these dynamics have prolonged the war, deepened humanitarian suffering (including famine in multiple regions), and complicated any realistic path to national reconciliation. Sudan has thus become both a case study and a critical node in a wider regional transformation that is redefining security complexes from the Red Sea to the Great Lakes.

The analysis concludes that without transforming competitive patronage into coordinated, accountable engagement, Gulf rivalries will continue to entrench instability, governance fragmentation, and humanitarian catastrophe across the Horn of Africa.

Recommendations: Strengthening multilateral governance of the Red Sea, supporting Sudanese institutional reconstruction, improving transparency in foreign investments, enhancing regional security cooperation, and adopting conflict-sensitive engagement strategies are critical to mitigating destabilizing competition. Specific steps include

establishing coordinated Red Sea forums, channeling aid through inclusive state-building programs, enforcing regulatory oversight of resource deals, creating joint intelligence sharing platforms, and aligning all external support with African Union led peace processes.

Introduction

Sudan has undergone a profound transformation in regional geopolitics, shifting from a relatively peripheral actor to a pivotal battleground where local power struggles intersect with intense international competition. The war that erupted between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) in April 2023 has not only caused institutional collapse and one of the world's worst humanitarian crises but has also triggered an unprecedented wave of external engagement. As of March 2026, according to Armed Conflict Location & Event Data Project (ACLED) figures, the conflict has resulted in over 170,000 direct deaths, displaced more than 11 million people internally, and forced more than 3 million refugees and returnees into neighboring countries. Famine has been officially declared in parts of North Darfur and is threatening additional regions, while Sudan's economy has shrunk by an estimated 55% since the war began, wiping out decades of development gains. (World Bank, 2025).

This evolving landscape is rooted in a deeper structural reality: Sudan's 800-kilometre Red Sea coastline has dramatically increased its strategic value precisely at the moment when Gulf states are actively projecting power across the Horn of Africa. The Red Sea accounts for approximately 12 percent of global seaborne trade and remains a critical artery for energy shipments and military logistics. (World Bank, 2023). What many observers initially viewed as a purely domestic power struggle between two rival Sudanese military factions is, in reality, deeply embedded within a broader geopolitical contest involving massive economic investments, arms transfers, political alliances, and naval posturing. Recent milestones illustrate this entanglement. The fall of Al-Fasher in late 2025 after a prolonged RSF siege was accompanied by documented atrocities and mass displacement, prompting fresh international condemnation while simultaneously highlighting how external logistical and financial support enabled the offensive to continue (International Crisis Group, 2026). Concurrently, Gulf states have faced their own regional pressures, including Houthi attacks on Red Sea shipping since late 2023 and shifting Middle East alliances, yet they have maintained and even expanded their involvement in Sudan through humanitarian aid packages, mediation initiatives, and reported selective backing of local actors. (International Crisis Group, 2026; De Waal, 2023).

This article addresses a central question: how do Gulf rivalries interact with Sudan's internal fragility to reshape governance and security dynamics not only inside Sudan but across the entire Horn of Africa? The core argument is that external competition is far more than an additional layer of pressure—it functions as a constitutive element that actively shapes patterns of political authority, influences the behavior of armed groups, and reconfigures the political economy of violence. Sudan therefore serves simultaneously as a revealing case study and as a critical node in a wider regional transformation that is redefining security complexes from the Red Sea to the Great Lakes. To develop this argument, the paper begins by outlining a conceptual framework grounded in regional security complex theory and the politics of external patronage. It

then evaluates Sudan's unique strategic position in the Red Sea arena, dissects the distinct strategies pursued by Saudi Arabia, the United Arab Emirates, and Qatar, analyzes the resulting patterns of fragmented sovereignty and hybrid governance, examines the role of external actors in fueling internal war economies, traces cross-border spillovers throughout the Horn, engages with counterarguments regarding potential stabilizing effects, and concludes with targeted policy recommendations designed for policymakers and practitioners.

Conceptual Framework: External Patronage and Regional Security Dynamics

Understanding the interplay between Sudan's domestic fragmentation and external competition requires a robust theoretical lens. This article draws primarily on regional security complex theory, first articulated by Barry Buzan and Ole Wæver, and the complementary concept of external patronage. The Red Sea and Horn of Africa together constitute an interconnected security complex in which the security concerns of one state are inseparably linked to those of its neighbors. Threats and opportunities do not respect national borders; instead, they travel through refugee movements, arms trafficking routes, illicit trade networks, and shared economic corridors. In such complexes, instability in a pivotal state like Sudan quickly diffuses outward, creating chain reactions that affect multiple countries simultaneously. (Buzan & Wæver, 2003).

Within this framework, external actors, most notably the Gulf states, have assumed increasingly prominent roles by projecting power through a combination of economic investments, military cooperation, and political alliances. Crucially, this projection rarely operates exclusively through formal state-to-state channels. More often, it involves direct relationships with sub-state actors, including paramilitary leaders, business elites, and local commanders. External patronage, defined here as the systematic provision of financial resources, military equipment, logistical support, or diplomatic cover by foreign powers to domestic stakeholders, produces distinct effects in fragile environments. In Sudan, patronage tends to reinforce pre-existing power imbalances, fragment authority structures, and hinder the consolidation of a coherent central state. Rather than acting as a stabilizing force, it frequently generates parallel systems of governance that compete with—and often undermine—formal institutions. Historical parallels can be drawn with cases such as Libya after 2011 or Yemen since 2015, where similar patronage dynamics prolonged civil wars and created durable hybrid political orders.

This theoretical approach is particularly useful for explaining the Sudanese case because it moves beyond simplistic narratives of "foreign interference" to reveal how Gulf rivalries become internalized within Sudan's conflict. Competitive patronage does not merely prolong fighting, it actively reshapes the incentives of local actors, alters resource flows, and redefines what constitutes legitimate authority. The framework also highlights why uncoordinated external engagement tends to exacerbate instability: when multiple patrons pursue conflicting objectives without overarching coordination mechanisms, the result is a more fragmented and unpredictable security environment. Applied to Sudan, this lens reveals that the war is no longer solely a contest between SAF and RSF; it has evolved into a regionalized conflict in which external calculations now exert decisive influence over battlefronts, economic survival strategies, and prospects for peace.

Sudan's Strategic Importance in the Red Sea Arena

Sudan's elevated geopolitical significance arises from the intersection of its geographic advantages and its current institutional weakness. The country possesses one of the longest coastlines on the Red Sea—more than 800 kilometres—featuring several operational ports and potential development sites. Port Sudan remains the primary gateway for the majority of Sudan's imports and exports, while the historic port of Suakin offers opportunities for tourism and trade revival. These assets sit astride one of the world's most vital maritime corridors, through which passes a significant share of global oil shipments, container traffic, and military vessels. Any disruption here carries immediate global economic consequences, as demonstrated by the Houthi-related shipping crisis that began in late 2023 and forced many vessels to reroute around the Cape of Good Hope, adding weeks to journey times and billions to insurance costs. (World Bank, 2023)

For Gulf states pursuing ambitious national visions, Sudan represents far more than a neighbor—it constitutes a strategic gateway for expanding influence throughout the Horn of Africa and into the western Indian Ocean. Saudi Arabia's Vision 2030 program includes massive Red Sea coastal developments such as NEOM and tourism megaprojects, making maritime stability in adjacent waters an existential priority. The United Arab Emirates has similarly invested heavily in port infrastructure across the region, viewing Sudan as a logical extension of its existing network that stretches from Dubai to Djibouti and Berbera. Sudan's internal fragility—characterized by the collapse of centralized command, the proliferation of armed factions, and the fragmentation of administrative control—creates precisely the kind of permissive environment in which selective foreign partnerships can flourish. This combination of high strategic value and low institutional resistance has turned Sudan into the focal point of contemporary Red Sea geopolitics. (Young, 2022)

Historical relationships have further amplified Sudan's relevance. Sudanese forces participated extensively in the Saudi-led coalition in Yemen between 2015 and 2022, forging personal and institutional ties that have carried over into the current conflict. What began as military cooperation has gradually evolved into multifaceted economic and political leverage. Today, control over Sudanese ports and coastal infrastructure is no longer merely a commercial matter, it has become a key element in the broader contest for regional dominance. As external actors vie for access and influence, Sudan's territory increasingly functions as a theater in which larger geopolitical rivalries are enacted, with profound consequences for governance inside the country and security across the Horn.

Gulf Rivalries and Expanding Influence in Sudan

Gulf engagement in Sudan reflects both converging interests in regional stability and underlying competitive dynamics. Saudi Arabia, the United Arab Emirates, and Qatar have each developed distinctive strategies that often align with different Sudanese

factions, and these approaches have grown more pronounced since the 2023 war outbreak.

Saudi Arabia has consistently prioritized regional stability and maritime security. Riyadh has channeled billions of dollars into humanitarian assistance since 2023 and hosted successive rounds of Jeddah-mediated talks between Sudanese parties in May 2023. The kingdom maintains strong ties with the SAF-led administration in Port Sudan, regarding a centralized military led authority as the most reliable partner for safeguarding commercial shipping lanes and protecting its own Red Sea investments. (International Crisis Group, 2024). Saudi statements have repeatedly emphasized the need for ceasefires, especially as broader Middle East tensions and Red Sea disruptions continue to affect global trade. This preference for state institutions over paramilitary forces underscores Riyadh's long-term interest in predictable governance that can guarantee security for energy exports and emerging tourism sectors.

In contrast, the United Arab Emirates has adopted a more assertive and diversified strategy encompassing port development, large-scale economic investments, and direct relationships with a range of local actors, including armed groups. Multiple reports issued by the United Nations Panel of Experts on Sudan between 2024 and 2026, along with investigations by Amnesty International and Reuters, have documented allegations of weapons shipments, logistical support, and financial transfers to the RSF, frequently routed via third countries such as Chad, Libya, the Central African Republic, and Somalia. While Abu Dhabi denies direct military involvement, it openly acknowledges extensive economic and security partnerships. (United Nations Panel of Experts on Sudan, 2025; The Sentry, 2024).

The economic dimension is particularly significant: Sudan's artisanal gold production, concentrated in RSF-controlled areas of Darfur, is largely refined and exported through Dubai, generating hundreds of millions of dollars annually that sustain RSF operations. Additional UAE investments target fertile agricultural zones along the Nile and potential port upgrades at Suakin. This multifaceted approach aligns with the UAE's broader ambition to construct a resilient network of maritime and economic footholds while countering ideological influences it perceives as threats. Critics contend that such engagement has inadvertently—or deliberately—prolonged the conflict by equipping the RSF with the resources necessary to maintain offensive momentum

Qatar, for its part, has emphasized political alliances and mediation. Doha has provided financial and diplomatic support that leans toward the SAF side while steering clear of direct military commitments. Qatar has hosted several dialogue sessions and contributed generously to humanitarian operations through the Qatar Red Crescent Society. Its role has adapted to shifting regional alignments, including the resolution of the 2017 Gulf crisis, yet it continues to cultivate long-term political influence. Like its counterparts, Qatar seeks strategic positioning without becoming overly entangled in any single faction's military fortunes. (De Waal, 2023).

These diverse engagements operate through overlapping channels: economic contracts negotiated outside formal state structures, legacies of Yemen era military cooperation, and patronage networks that extend to mid level commanders and business elites. Collectively, they intersect with Sudan's profound internal divisions, redistributing resources, tilting local power balances, and generating new incentives for continued

warfare. The competitive character of these relationships has, perhaps unintentionally, accelerated the fragmentation of Sudanese authority and rendered unified national governance increasingly elusive. (Young, 2022).

Fragmented Sovereignty and Hybrid Governance

A primary outcome of intensified external engagement has been the progressive fragmentation of Sudanese sovereignty. Foreign support has not bolstered a centralized state; instead, it has empowered parallel power structures that now coexist with—or openly challenge—formal institutions. The security sector exemplifies this hybridity. Regular SAF units operate alongside RSF paramilitaries and a variety of externally linked militias, sometimes cooperating on specific fronts and sometimes clashing over territory or resources. The RSF itself has evolved into a hybrid actor that combines military functions with economic enterprises and political negotiations, maintaining independent command structures and transnational supply lines. This arrangement allows the RSF to function effectively as a quasi-state in the territories it controls, particularly in western Darfur (Chatham House, 2025).

Economic governance has undergone a parallel transformation. Major investment deals in agriculture, mining, and infrastructure are routinely concluded outside official channels, bypassing ministries and reducing both transparency and public accountability. Gold exports alone—tracked by UN experts at several hundred million dollars per year from RSF-held mines—flow through private networks linked to external refining hubs rather than contributing to a national budget. Consequently, economic rents accrue to specific armed factions rather than serving collective state purposes. Direct interactions between foreign representatives and local elites further erode institutional coherence, fostering patterns of elite capture in which narrow interests prevail over broader national development goals. The cumulative effect is a governance landscape in which multiple centers of authority claim legitimacy, rendering future state reconstruction exceptionally challenging and increasing the likelihood of protracted low-level conflict even after any formal ceasefire.

Conflict Dynamics: External Competition and Internal War Economies

External competition exerts a decisive influence on the character and duration of Sudan's war. By supplying financial resources, military materiel, and political legitimacy to local protagonists, foreign patrons alter the cost-benefit calculations of armed groups and diminish their incentives for compromise. Alliances have become highly fluid, factions realign according to which external sponsor offers the most advantageous package at any given moment, producing a volatile battlefield environment marked by shifting frontlines and opportunistic ceasefires.

War economies have emerged as the central mechanism sustaining this dynamic. Control over high-value resources—gold mines in Jebel Amir and elsewhere in Darfur, fertile agricultural land along the Nile Valley, and strategic trade corridors—has become inextricably linked to external support networks. Gold, in particular, functions as the financial backbone of the RSF, with smuggling routes extending through Chad and Libya before reaching Dubai's refining and trading ecosystem. The SAF, meanwhile, derives revenue from controlled oil fields, customs duties in government-held territories, and taxation systems that have adapted to wartime conditions. External

actors, whether by design or default, have become embedded components of these economic circuits, providing markets, transport logistics, and political protection that keep the conflict economically viable. The result is a self-perpetuating cycle in which violence generates profit, profit finances further violence, and external patronage supplies the necessary infrastructure. Consequently, the Sudanese conflict can no longer be analyzed in purely domestic terms; it must be understood as the product of intertwined local grievances and regional rivalries that together redefine the political economy of war in the Horn of Africa. (International Crisis Group, 2026).

Regional Spillovers: Implications for the Horn of Africa

The consequences of Sudan's instability extend far beyond its borders and constitute one of the most direct manifestations of how Gulf rivalries are actively reshaping the broader Horn of Africa security complex. As a central node linking the Red Sea corridor with the interior Horn, Sudan's war has generated cascading effects that transform what began as a domestic power struggle into a regionalized crisis. These spillovers are not merely incidental side effects, they are constitutive of the new regional order, driven by the same external patronage dynamics that sustain the Sudanese conflict itself (Buzan & Wæver, 2003; International Crisis Group, 2026).

Maritime security stands out as the most immediate and visible spillover. Increased militarization along Sudan's Red Sea coastline, combined with competing Gulf-backed infrastructure projects in Port Sudan, Suakin, and adjacent waters, has heightened risks of miscalculation and escalation. The presence of multiple external actors, Saudi Arabia supporting SAF-aligned facilities, while reported RSF linkages create parallel supply lines, has contributed to a more congested and contested maritime domain. Houthi attacks since late 2023 have already forced global shipping reroutes around the Cape of Good Hope, raising insurance costs and disrupting energy flows that pass through the Suez Canal corridor. Gulf rivalries exacerbate this volatility: selective port access deals and naval posturing by Riyadh and Abu Dhabi have prompted defensive responses from other regional players, turning the Red Sea into a theater of proxy competition rather than cooperative governance (World Bank, 2023; Chatham House, 2025).

Cross border flows of people, arms, and resources further amplify instability. By March 2026, over 3 million Sudanese refugees and returnees have strained neighboring systems in Chad, South Sudan, Ethiopia, and Egypt. Chad and South Sudan, already fragile, now host hundreds of thousands of refugees, creating competition over scarce resources and risking localized clashes between host communities and newcomers (United Nations Office for the Coordination of Humanitarian Affairs, 2026). Arms proliferation is equally concerning, UN panels have documented flows of weapons routed through Gulf-supported networks into Darfur and onward to neighboring conflicts, sustaining non-state armed groups across borders (United Nations Panel of Experts on Sudan, 2025). These movements link directly to Ethiopia's western border, where allegations persist of RSF transit and recruitment, and to Eritrea, which has provided logistical support to SAF positions amid its own tense relations with Addis Ababa (International Crisis Group, 2026).

The diplomatic and institutional spillovers are equally damaging. Competing Gulf influences have fragmented regional mediation efforts. IGAD and African Union initiatives have been undermined as Sudanese factions seek patronage from different

external backers, creating parallel negotiation tracks that dilute collective pressure for peace. In Ethiopia, the Sudanese crisis has intersected with longstanding Tigray and Amhara dynamics, raising fears of renewed Ethiopia-Eritrea flare ups or Nile resource disputes. South Sudan's fragile peace process faces additional strain from cross-border militias and refugee pressures, while Chad risks destabilization along its porous Darfur frontier (De Waal, 2023).

Economically, spillovers disrupt regional trade and development. Sudan's collapse has severed key supply routes, affecting agricultural exports from the Nile Valley and livestock trade with Ethiopia and South Sudan. Gulf investments in Sudanese gold and agriculture have created parallel economies that bypass national borders, reinforcing illicit networks rather than formal integration. These patterns mirror broader Red Sea geopolitics, where competitive port strategies (e.g., UAE projects in Somaliland versus Saudi initiatives) risk turning economic cooperation into zero-sum rivalry (Young, 2022).

Overall, the regional spillovers demonstrate that Gulf rivalries do not stop at Sudan's borders; they actively reconstitute the Horn of Africa as a single, interconnected insecurity complex. What happens in Khartoum or Port Sudan now directly conditions stability in Addis Ababa, Asmara, Juba, and N'Djamena. Without coordinated multilateral mechanisms to manage these interdependencies, external competition will continue to export instability, prolonging cycles of conflict and undermining prospects for regional peace (International Crisis Group, 2026).

Counterarguments: Can External Engagement Be Stabilizing?

Any balanced analysis must acknowledge that external engagement by Gulf states is not intrinsically destabilizing. Saudi Arabia has spearheaded large-scale humanitarian operations that have alleviated suffering in displacement camps, while the UAE has financed hospitals, schools, and agricultural initiatives in areas under its influence. Qatar has played a constructive mediation role, facilitating dialogue rounds that at times brought opposing parties closer to agreement. When such contributions are transparent, coordinated with Sudanese civilian stakeholders, and integrated into multilateral frameworks, they can indeed support stabilization and long-term development objectives.

Nevertheless, outcomes depend critically on context and implementation. Absent robust coordination and accountability mechanisms, even well-intentioned assistance risks reinforcing existing power asymmetries and prolonging fragmentation. The decisive variable is therefore not the mere presence of external actors but the specific form their involvement takes. Competitive, uncoordinated patronage tends to exacerbate instability by creating parallel authorities and reducing incentives for compromise. In contrast, cooperative and regulated engagement—aligned with national priorities and African Union principles—holds genuine potential to contribute positively. Recognizing the tangible benefits provided by Gulf states does not diminish the urgent requirement for improved oversight, greater transparency, and stronger integration with Sudanese and regional institutions. Only through such adjustments can external support shift from a driver of division to a catalyst for sustainable peace and governance reform.

Conclusion and Recommendations

Sudan's current trajectory vividly illustrates the complex entanglement of internal fragility and external competition. As Gulf states intensify their activities in the Red Sea arena, Sudan has become a primary theater in which larger regional rivalries are contested. The preceding analysis demonstrates that external patronage functions not as a peripheral influence but as a core driver of fragmented sovereignty, hybrid governance structures, and self-sustaining war economies. These processes carry profound implications for Horn of Africa stability, encompassing maritime security threats, cross-border refugee pressures, and risks of wider interstate conflict.

Policy Recommendations: To address these challenges, the following actionable steps are recommended:

- The United Nations Security Council and the African Union should establish and lead a standing multilateral Red Sea governance forum with binding guidelines on port development, resource extraction, and military presence to reduce unilateral competition and prevent further militarization of the Red Sea corridor.
- IGAD, in coordination with the African Union, should create dedicated regional intelligence sharing platforms and joint mechanisms among Horn of Africa states and Gulf partners to control arms proliferation, manage cross-border refugee movements, and coordinate rapid responses to emerging threats.
- International donors, the World Bank, and the European Union, working with Sudanese civilian authorities, should channel targeted and conditional aid specifically for inclusive state-building, institutional reconstruction, and capacity building programs that empower civilian led governance and counter fragmented sovereignty.
- Gulf states (Saudi Arabia, the UAE, and Qatar) must align all their political, economic, and military engagements with African Union led peace processes and adopt explicit conflict-sensitive safeguards to avoid empowering armed factions at the expense of legitimate state institutions.
- The UN, AU, and IGAD should institute mandatory international oversight and public disclosure mechanisms for all major foreign investments in Sudan, particularly gold trade, agricultural land deals, and port infrastructure projects, to improve transparency and reduce elite capture.
- Sudanese transitional authorities and civilian actors, supported by the African Union and international partners, should prioritize the development of inclusive national dialogue processes that integrate local communities and civil society to ensure that external support serves long-term peace and accountable governance rather than short term patronage.

Closing Statement

The future of Sudan and the broader stability of the Red Sea region ultimately hinges on the capacity of international and regional actors to transform competitive patronage into coordinated, transparent, and accountable engagement that places Sudanese civilian priorities at the center. Without this fundamental reorientation, the dynamics

currently at play risk entrenching cycles of violence, governance fragmentation, and humanitarian catastrophe across the Horn of Africa for generations to come.

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