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CHINA IN THE HORN OF AFRICA: CONNECTIVITY, SECURITY, AND THE LIMITS OF REGIONAL INTEGRATION

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Abstract

The Horn of Africa region is a key geopolitical and geoeconomic intersection in the transforming world order of the 21st century. The proximity of the Red Sea, the Bab el-Mandeb Strait, the Gulf of Aden, and the Suez Canal makes the region strategically significant for global trade, energy security, and great-power competition. At the same time, the region is characterized by persistent political instability, inter-state and internal conflicts, weak institutional capacities, and low levels of regional integration. The study examines the extent to which China's originally primarily economic and infrastructural presence in the region is shifting into a broader security-development role, and its impact on the region's development and regional integration. The analysis is based on frameworks of world order transformation, geoeconomics, and regional integration, with particular attention to the Chinese Belt and Road Initiative and the strategic role of infrastructure and connectivity. Ethiopia emerges as a prominent case study: both the Addis Ababa light rail and the Addis Ababa–Djibouti railroad illustrate the transformative potential and limitations of Chinese-funded infrastructure. The study indicates that Chinese projects have significantly improved physical connectivity, yet financial sustainability, debt, maintenance and technology transfer issues, and insufficient regional institutional embedding have limited their developmental and integrative impact. At the same time, China's growing maritime and security presence – particularly through the Djibouti military-logistics facility, anti-piracy operations, and UN peacekeeping – indicates that the increase in Beijing's economic interests is gradually creating security obligations as well. The study concludes that China is increasingly emerging as a security-development actor in the Horn of Africa, but it cannot yet be considered a comprehensive regional security provider. Similarly, Chinese infrastructure has created connectivity, but on its own, it has not fostered deeper regional integration.

Keywords

Horn of Africa, IGAD, China, connectivity, regional integration

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1. Introduction

The Horn of Africa is a region where local, regional, and global processes are especially interconnected. Its importance goes beyond the political and economic influence of the states in the area; its geographical location is a key factor. The region has direct access to the Red Sea, the Gulf of Aden, and the Bab el-Mandeb Strait, which connect to the Suez Canal. This route is vital for trade between Europe and Asia and is crucial for countries in the Middle East and Africa, making these waters central to global trade. Consequently, regional security challenges can quickly have worldwide implications, which our study supports.

The geopolitical significance of the region, however, is coupled with internal vulnerabilities; instability, interstate conflicts, civil wars, terrorism, and ethnic tensions have characterized the daily lives of the region's states. In Somalia, prolonged state fragility and weakly governed spaces have also provided room for violent extremist organizations, most notably al-Shabaab, to maintain and adapt their activities (Marsai–Tarrósy, 2022). South Sudan's conflicts, Sudan's war, Ethiopia's internal political and ethnic tensions, and the maritime access disputes between Ethiopia and its neighbors further indicate that economic development and security cannot be separated in the region. Therefore, it is particularly important to examine the role of external powers in the region, as over the past two decades the region has gradually become a key arena for global and regional great-power competition. In addition to the United States, China, the European Union, and certain European states, Gulf States, Türkiye, and other emerging actors are also striving to be present in the region through economic, diplomatic, and security means. One of the most striking manifestations is Djibouti, where several external powers maintain a military presence.

The region is not just a collection of local conflicts and developmental issues; it is a focal point in the evolving global order where the interests of international actors are closely tied to regional political and economic conditions. Among these external players, China's role has changed dramatically. This study aims to explore and present that transformation.

Although the history of China-Africa relations dates back much further, the foundations of the current Chinese presence are primarily linked to the China-Africa Cooperation Forum (FOCAC) established in 2000, and later to the Belt and Road Initiative (BRI) announced in 2013. FOCAC institutionalized and elevated Chinese-African cooperation to a higher political level, while the BRI provided new momentum for infrastructure financing, the development of transportation networks, energy systems, ports, and industrial parks.

The region under examination gained particular significance in this process, and China's presence in the area was also remarkable globally, primarily in the economic dimension. Alongside the slogan of connectivity, China has built railroads, roads, ports, electrical grids, industrial parks, and telecommunications systems with Chinese financing. The study showcases two projects as mini-case studies to illustrate the dual nature of Chinese infrastructure development. Our primary goal is to examine how this role interacts with the evolving Chinese presence in the region. We analyze whether the connectivity provided is adequate for regional integration and whether Chinese activities have played a significant role in the area's regionalization. However, Chinese presence can no longer be described solely in economic terms. As the exposure of Chinese companies, investments, citizens, and trade routes increased, ensuring their security became increasingly important. In this sense, economic presence created security needs (Salát, 2019). Chinese participation in anti-piracy operations, contributions to UN peacekeeping missions in Africa, and, above all, the opening of China's first overseas military-logistical facility in Djibouti in 2017 are the most significant signs of this change.

2. Research design and methodology

Based on these considerations, the study addresses the following main research question: To what extent has China's engagement in the Horn of Africa evolved from a predominantly economic and infrastructure-centred presence into a broader security-development role?

Two sub-questions guide and define the analysis:

1. What developmental and connectivity effects have Chinese-financed infrastructure projects generated, particularly in Ethiopia and along the Ethiopia–Djibouti corridor?
2. To what extent have these effects contributed to deeper regional integration in the Horn of Africa?

To answer the question, the study applies three interrelated theoretical perspectives: the transformation of the world order and polarity, the geo-economics approach, and the theory of regional integration. The analysis draws on relevant literature, international economic and trade databases, Chinese financing data, and several years of field research on Ethiopian railroad projects. In addition to infrastructure, the analysis pays special attention to debt and local perceptions, then turns to China's maritime and security engagement.

This structure allows for the examination of how the economic, developmental, and security dimensions of Chinese presence are interconnected – and why they have not fundamentally transformed the fragmented regional order of the Horn of Africa to date.

Methodologically, the study adopts a qualitative case-study design that combines regional-level analysis with an embedded Ethiopian case study. The regional level of the analysis relies on peer-reviewed literature, official and institutional reports, international trade and infrastructure data, databases showcasing Chinese lending, and evidence related to China's maritime and security commitments. This regional analytical level is complemented by several years of field research on Ethiopian railroad projects (Tarrósy–Vörös, 2026).

Ethiopia was selected as the primary case study due to the extent and duration of its economic and infrastructural relationship with China, as well as the concentration of significant Chinese-funded transportation projects. The Addis Ababa light rail and the Addis Ababa–Djibouti railroad serve as two analytically distinct infrastructural cases: the former illustrates the developmental and operational impacts of a primarily domestic urban transport project, while the latter provides a cross-border case directly related to maritime access, logistics, and regional connectivity. The study evaluates Chinese engagement along four analytical dimensions. (1) Connectivity is evaluated through the establishment and operation of transportation links, transportation capacity, cargo and passenger traffic, as well as access to ports and logistics networks. (2) The developmental impacts are examined through the project's performance, financial sustainability, maintenance, local economic linkages, and technology and knowledge transfer. (3) We evaluate regional integration more rigorously based on cross-border economic utilization, regulatory and institutional coordination, regional institutional embedding, and the extent to which projects go beyond bilateral agreements. Finally, (4) we aim to assess China's emerging security-development role based on the relationship between its increasing economic exposure and security activities (including anti-piracy operations, UN peacekeeping, the Djibouti military-logistical facility, and broader security cooperation).

The region is not just a collection of local conflicts and developmental issues; it is a focal point in the evolving global order where the interests of international actors are closely tied to regional political and economic conditions.

The two Ethiopian case studies are not considered a comprehensive and defining project for the entire Horn of Africa region; instead, they serve as analytically informative cases through which the possibilities and limitations of infrastructure-based connectivity can be examined.

Consequently, we draw regional-level conclusions only when the case study results align with broader evidence regarding Chinese engagement, regional institutional dynamics, and the wider Red Sea security environment. Therefore, we use results and information from different types of sources in a comparative manner to distinguish project-specific findings from broader regional patterns.

For the purposes of the empirical case-study design, the core Horn of Africa refers to Djibouti, Eritrea, Ethiopia, and Somalia, while the wider IGAD and Red Sea regional context is considered where cross-border connectivity, security dynamics, or regional institutional processes extend beyond these four states.

3. Theoretical and Conceptual Framework

Three closely interconnected approaches can be used to analyze the presence of the People's Republic of China in the region: the perspective of world order and structural transformations interprets Beijing presence along the lines of changing international relations; the geo-economic approach presents the commercial-economic and infrastructural aspects of strategic influence acquisition; and regional integration seeks to answer whether Chinese presence and investments will transform into lasting economic, political, and institutional integration.

3.1. World order, polarity, and an unstructured reality

World order is a structure of rules, institutions, norms, and power relations that determines the scope of action for various actors, not just states. According to the neorealist and predominantly state-centric approach, the key actors in the international system are those capable of exerting global influence, serving as power centers through their economic, political, military, or cultural means. Since the end of the Cold War, American dominance, which had been prevalent for many years, has been declining. However, the multipolar system that many anticipated has not yet materialized (Vörös–Tarrósy, 2024). This interpretation resonates with broader attempts to conceptualize the post-hegemonic international system without reducing it to simple multipolarity. Acharya (2017), for instance, describes an emerging "multiplex world order" characterized by a plurality of actors, institutions and organizing principles rather than the replacement of one hegemon by a clearly structured set of great-power poles. Instead, a structure that can be described as unstructured has emerged (Vörös–Tarrósy, 2026), in which Washington still possesses hegemonic capacities, but its global role has transformed and relationships have become more unpredictable. At the same time, such systemic fragmentation does not imply that emerging powers are merely passive within it. Salát (2026) conceptualizes China as an active order-shaping actor whose initiatives seek to construct a hub-and-spoke network architecture centred on Beijing, with the BRI providing a material basis for this network-building logic. China's economic and political rise, observable in this region for years, can be examined alongside other regional powers, but the weakening of global institutions' problem-solving capabilities does not necessarily favor emerging powers and regional actors that cannot guarantee international security.

The current world order is therefore not one of disorder, but a structure that brings about the erosion of previous norms, in which the danger of local and regional conflicts and their escalation may be more significant (Ibid.). In this sense, it is worth examining China's role in guaranteeing regional security. The Horn of Africa region is a particularly sensitive regional intersection of this transforming world order (Tarrósy, 2013). The region is important not only because of the power dynamics within the continent but also because it is directly connected to the Red Sea, the Bab el-Mandeb Strait, the Gulf of Aden, and the Suez Canal trade route. In the region, therefore, the interests of local states, regional organizations, and external great powers overlap. Alongside China and the United States, the European Union, the Persian Gulf states, Türkiye, and other actors are also seeking influence through economic, diplomatic, or military means.

To interpret Beijing's regional presence, it is not sufficient to base it solely on economic support for developing countries; Chinese-funded railroads, ports, roads, energy systems, and telecommunications networks can all contribute to host-country development and strengthen China's strategic positions. In this regard, of course, Beijing's involvement is one of the regional manifestations of the transformation(s) of the world order: through economic relations, political partnerships, and gradually through security presence, China strives to participate in shaping the rules and relations of the region, but it is also worth thoroughly examining its economic presence.

3.2. Geo-economics and the Strategic Role of Infrastructure

The geo-economic approach examines economic resources and tools in the context of strategic foreign policy objectives. In this interpretation, trade, lending, foreign investment, technological cooperation, infrastructure financing, and access to markets are not solely economic activities but can also be tools for gaining and maintaining influence (Luttwak, 1990; Blackwill–Harris, 2016). As Farrell and Newman (2019) demonstrate, interdependence does not necessarily eliminate power politics; under certain conditions, control over central nodes in economic and informational networks can itself become a source of political leverage. The Chinese Belt and Road Initiative, or BRI, is one of the most important manifestations of this infrastructure-centered geo-economic strategy. The program's central concept is connectivity: creating a network of transportation routes, ports, industrial parks, energy grids, and digital systems that facilitates the movement of goods, capital, information, and people (Eszterhai, 2016). Through connectivity and relationships, political conditions are also created and shaped; infrastructure development can even generate long-term technological collaborations and integrate norms. In this approach, Chinese investments, on the one hand, provide a genuine response to Africa's significant infrastructure deficits and enable investments that the host countries would have difficulty financing from other sources. It is equally important, however, that these projects strengthen Beijing's access to local markets, strategic transportation corridors, and political decision-makers – in a region that is particularly significant for China due to global trade relations.

This interpretation cannot be one-sided; host states are not merely passive actors. The Chinese financing, which is significant for this study, is channeled into projects determined by the host state. For instance, the Ethiopian leadership has allocated Chinese funding to railroads, industrial parks, energy investments, and logistics systems, viewing these projects as tools for enhancing regional leadership. In summary, China did not simply impose these initiatives on Ethiopia; rather, Ethiopian institutions actively selected, negotiated, and integrated them into their own development narrative. Consequently, while the relationships may be asymmetrical, they are far from one-sided (Tarrósy–Vörös, 2026).

3.3. Regional integration

When examining regional integration, it is worth highlighting that it is not simply about the existence of infrastructure. A railroad line can signify connectivity, and such a network can create the fundamental conditions for regionalization, supporting the cross-border nature of economic and social relations. However, regional integration is an even deeper process: harmonizing rules, breaking down barriers, fostering institutional cooperation, and creating common policies. In classical economic integration theory, integration entails progressively deeper forms of institutionalized economic cooperation rather than mere physical interconnectedness. Balassa's (1961) distinction between different stages of integration – from the removal of trade barriers to increasingly coordinated economic arrangements – therefore helps explain why the construction of cross-border infrastructure cannot in itself be treated as evidence of regional integration. The study also asks whether the Chinese presence has had, or will have, a ripple effect in the region. Besides the classical theory, an intergovernmentalist perspective is equally relevant to the Horn of Africa, where national preferences and state strategies remain decisive. Regional infrastructure may generate incentives for cooperation, but deeper integration is unlikely where governments continue to prioritize national sovereignty, domestic political objectives, and bilateral bargaining over supranational or region-wide arrangements (Moravcsik, 1993).

The bilateral nature of China's economic strategies raises questions about how these partnerships can influence regional dynamics. Schiere and Rugamba (2011) argue that while Chinese infrastructure investment can alleviate significant supply-side obstacles to African integration, the predominantly bilateral framework of China's engagement may also limit efforts to address truly regional issues.

For the purposes of the present study, these concepts are closely interconnected, but they should not be understood as forming an automatic or deterministic sequence. The geo-economic approach highlights how economic instruments – including trade, lending, infrastructure financing, investment, and access to markets – can also serve broader strategic and foreign-policy objectives. Connectivity, in this sense, refers to the physical and functional linkages that facilitate the movement of goods, capital, people, and information. Such connections can create important conditions for regionalization, but they do not necessarily result in deeper regional integration. The latter requires more sustained forms of cross-border cooperation, institutional coordination, regulatory harmonization, and the embedding of economic relations in regional structures. Along similar lines, the concept of a security-development actor is used in this study to describe an external actor whose expanding economic and developmental presence gradually creates security-related interests and responsibilities, particularly in relation to the protection of investments, citizens, trade routes, and strategic access, while also encouraging selective participation in regional security processes. In this interpretation, therefore, improved connectivity does not automatically generate regional integration, just as a growing security presence does not in itself make China a comprehensive regional security provider.

4. Why the Horn of Africa matters

The Horn of Africa has long been a hot-button and contentious topic for international politics scholars and practitioners. The region's geostrategic significance underscores why it matters not only in Africa but also as a site of great-power politics and statecraft in the grand diplomatic game. To support this, the study presents its analysis in three main points: geostrategic competition, economic supply chain positioning, and national defense posturing. Its importance has been a critical flashpoint in an ongoing competition primarily between the West and China, or more broadly, between developed and emerging economies. The strategic value of the Horn of Africa has historically hinged on the region's geographic position. Namely, Bab El-Mandeb, the Red Sea, the Gulf of Aden, and the Suez trade route pose regional and transnational importance. Control and influence over these chokepoints and trade routes are of primary importance to the world's economies. As shown by the 2025 tensions between the US/Israel and Iran, trade routes affect global trade because of interdependent supply chains in the age of globalization and international trade.

The Strait of Hormuz enabled Iran to push back against the US/Israel offensive with a blockade that has significantly withheld the transport of 20.9 million barrels of oil per day (United States EIA, 2024). By blocking the trading route, it placed unprecedented pressure on world markets, leading to a global rise in oil prices. The chokehold on the international market forces the hand of the United States into a stalemate and possible concessions with Iran. These conditions establish an interdependent, globalized, and complex economic value chain that can lead to mutual damage and prolonged escalations, resulting in battles of attrition. The Horn of Africa, surrounded by key trading routes and ports, is as crucial to the global com-

	2018	**2019**	**2020**	**2021**	**2022**	**1H23**
Total Oil flows through Suez Canal and SUMED pipeline	6.4	6.2	5.3	5.1	7.2	9.2
Crude oil and condensate	3.4	3.1	2.6	2.2	3.6	4.9
Petroleum products	3.0	3.1	2.6	2.9	3.6	4.3
LNG flows through Suez Canal (Billion cubic feet per day)	3.3	4.1	3.7	4.5	4.5	4.1
Total oil flows through the Bab El-Mandeb Strait	6.1	5.9	5.0	4.9	7.1	8.8
Crude oil and condensate	3.0	2.7	2.2	1.9	3.3	4.5
Petroleum products	3.1	3.2	2.8	3.1	3.8	4.4
LNG flows through Bab el-Mandeb Strait (Billion cubic feet per day)	3.1	3.9	3.7	4.5	4.5	4.1

Table 1. Volume of Crude oil, condensate, and petroleum products transported through the Suez Canal, SUMED pipeline, and Bab El-Mandeb Strait (2018-1H23). Source: U.S. Information Energy Information Association, 2023

munity as the Strait of Hormuz. This significance warrants further research and assessment of its global importance, particularly in relation to China.

5. Global Economic Chokepoints: The Red Sea, Gulf of Aden, Bab El-Mandeb, and Suez Canal

Traditionally, the Horn of Africa, along with the Gulf of Aden and the Red Sea, is recognized as one of the world's busiest trade clusters. The region's significance is further emphasized by tensions arising from government instability in Africa and conflicts in the Middle East. Geopolitical tensions are compounded by the surrounding countries – Djibouti, Egypt, Sudan, Saudi Arabia, Eritrea, and Yemen – because of their shared economic interests, which often spill over and affect the region as a whole. Adjacent to the Red Sea, the Gulf of Aden exemplifies the vulnerability of the trading route, costing companies millions in rerouting, insurance, and ransom (D'Agostini–Ryoo–Jo, 2015). The significance of the route from the Gulf of Aden through Bab El-Mandeb, the Red Sea, and the Suez Canal has continued to grow with global trade and the supply-chain interdependence of global actors. Despite unexpected events like the COVID-19 pandemic, the trade route – highlighted by oil flows through the straits – underscores the region's growing significance in the global market.

The Horn of Africa plays a crucial role as a key passage connecting Asia and Europe, making it globally significant, especially for dominant economic powers like China. Ongoing attacks in the region and the surrounding waters have led to widespread economic repercussions worldwide, causing disruptions and delays. During the peak of this issue in the 2000s and 2010s, the costs reached as high as $3.3 billion for every $120 million extorted by pirates, particularly in the Gulf of Aden (Royal Economic Society, 2013).

From the Gulf of Aden, the Bab El-Mandeb Strait is a precarious choke point leading into the Red Sea and the Suez Canal. As a narrow passage connecting the Mediterranean and the Indian Ocean, 10-12 percent of global trade passes through the strait, making it a critical artery for global trade and energy security and a flashpoint of geopolitical competition (Coface, 2025). Additionally, 9 percent of global oil shipments transit through Bab El-Mandeb, making them vulnerable to instability from nearby nations, including Yemen, Djibouti, and Eritrea (United States EIA, 2023). To the north, the Suez Canal is similarly important, with 12 percent of annual global trade and 30 percent of freight traffic passing through (New Zealand Ministry of Foreign Affairs and Trade, 2021). Connecting much of the trade from Asia and Europe to the Middle East and Africa, the three critical flashpoints of geostrategic competition, economic supply chain position, and national defense posturing are vital modes of analysis for assessing its importance, current conditions, and future projections.

The Horn of Africa presents a vital conundrum that must be addressed because of global trade and supply-chain interdependencies. Energy security is often highlighted in geopolitical literature because it reveals the complex relational dependencies of

	2020	2021	2022	2023	2024	1H25
Strait of Malacca	22.8	22.1	23.0	24.0	22.5	23.2
Strait of Hormuz	19.2	19.7	21.9	21.8	20.7	20.9
Suez Canal and SUMED Pipeline	5.4	5.2	7.3	8.8	4.8	4.9
Bab El-Mandeb	5.7	6.0	8.0	9.3	4.1	4.2
Danish Straits*	3.1	3.1	4.2	5.0	4.9	4.9
Turkish Straits (Dardanelles)	3.2	3.3	3.2	3.5	3.6	3.7
Panama Canal**	1.7	1.8	2.2	2.2	2.0	2.3
Cape of Good Hope	7.9	7.2	6.1	6.2	9.3	9.1
World maritime oil trade	74.1	75.9	78.6	80.2	79.7	79.8
World total oil supply	94.1	95.8	100.6	102.6	103.3	104.4

Table 2. Volume of crude oil and petroleum liquids transported through world chokepoints and the Cape of Good Hope, 2020-1H25.
**Danish Straits do not include Kiel Canal data*
***Panama Canal data (October 1 to September 30)*

global trade routes. Based on the volume of crude and petroleum transport, the Suez Canal and the Bab El-Mandeb are among the top chokepoints in the world. Due to recent tensions, traffic through the Cape of Good Hope spiked, affecting global oil prices and triggering widespread inflation and supply chain slowdowns.

The importance of the Red Sea and the stability of the Suez Canal, Bab el-Mandeb, and, to some extent, the Gulf of Aden have a significant domino effect on global trade. The recent attacks in the Red Sea in 2024 have caused a drastic shift in trade patterns, resulting in a sharp year-on-year drop of 50 percent in high-frequency transit in January 2024. Additionally, transit trade volume through the Cape of Good Hope has increased by 74 percent compared to the same period in 2023. This shift has led to a 6.7 percent decline in port calls in sub-Saharan Africa, while the European Union, Middle East, and Central Asia have all seen a 5.3 percent decrease (Kamali et al., 2024).

A 30-day simulation of a possible disruption in the Red Sea poses a clear and grave threat to global trade, with incoming and outgoing traffic flows affected by millions of tons. Based on the simulation, global supply chains will be significantly impacted, causing economic slowdowns worldwide. While rerouting toward the Cape of Good Hope can offer a temporary solution, it will set back production and disrupt markets, with demand pressure from energy insecurity and shortages of intermediary and raw materials. Incoming goods to Europe, East Asia, and China, and outgoing goods from the Gulf, Western Asia, and the Americas, are severely affected.

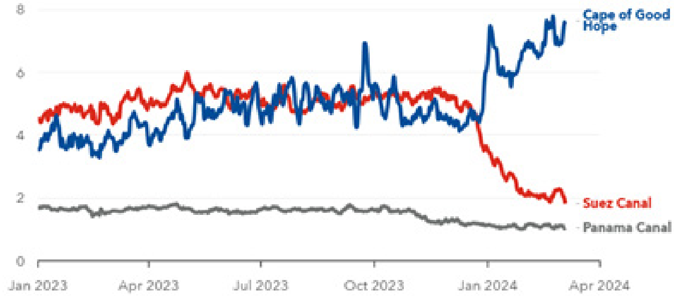

Figure 1. Daily transit trade volume (million metric tons, 7-day moving average). Source: Kamali, Koepke, Sozzi, et. al. 2024.

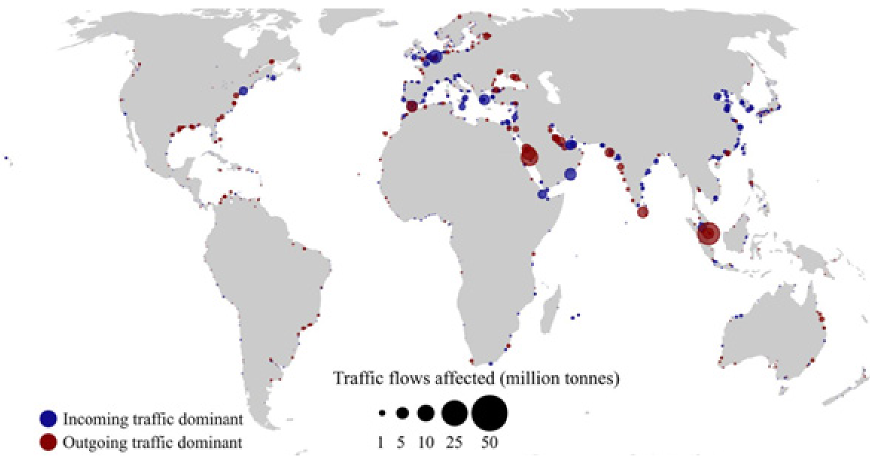

Figure 2. Simulation of the Global Supply Chain Impact of a possible disruption on the Red Sea. Source: IMF Portwatch, 2025

Further highlighting the effects of a possible disruption on the Horn of Africa, a case simulation shows that a 90-day disruption at the Port of Djibouti will have direct and costly consequences for states relying on trade and manufacturing exports, such as China. In the simulation using data from the IMF-Portwatch spillover simulator, China stands to lose 58 million USD with a 30-day disruption of its supply chain from a single port in the Horn of Africa (Port of Djibouti). Incoming traffic by dominant regions and countries suggests reliance on raw materials and intermediary goods, while outgoing traffic indicates exports of goods to consumer countries in need.

With only a single port in the simulation, this highlights the Red Sea's importance to China. Any disruption to this region would significantly impact China's economic balance. As a leader in manufacturing and exporting, China's growing presence in the area is not surprising. To ensure a steady flow of goods, raw materials, and trade, China needs to strengthen its relationships with countries in Africa and the

Industry at Risk	Percentage of Total Industry output at risk (US Dollars) in 90-day simulation
Machinery and Electrical Equipment	29.73% /17, 667 562.4
Metals	17.27% / 10,262, 560.8
Chemical and Allied Industries	27%/ 6, 700, 070.5
Wood and Wood Products	7.48% / 4, 443, 274
Textile and Footwear	6.68%/ 3, 969, 115.2
Mineral Products	5.02%/ 2,983, 521.5
Stone and Glass	4.74%/ 2,816, 774.5
Miscellaneous	4.01%/ 2,380,566.9
Vegetable Products	3.93%/ 2,336, 541.8
Plastics and Rubber	3.21%/ 1, 910, 323
Vehicles and Equipment	2.83%/ 1,681, 646.4
Animal and Animal Products	1.55%/ 922, 638.6
Total Economic Value at Risk in 90 days of disruption (Port of Djibouti)	58, 074, 595.6

Table 3. Economic Value of China at Risk in 90 days of disruption. Source: IMF Portwatch, 2025

Gulf. China's economic and military presence in the Horn of Africa underscores the importance of securing its interests abroad. By firmly establishing its footprint in the region, China aims to prevent competitors – particularly the United States – from gaining control or a monopoly over regulations and policies. This strategy effectively helps China maintain an informal balance of influence in the Horn of Africa and the surrounding region.

6. Evolution of China's Engagement in the Region: A Catalyst or Detriment for Regional Integration

China's presence in Africa, specifically in the Horn of Africa, has been an ongoing project whose visible impact dates to the 1990s and intensified in the 2000s, when the Forum on China-Africa Cooperation (FOCAC) served as a precursor to advancing common interests. From 2000-2024, China committed to 1,319 agreements totaling 180.87 billion USD across 49 African states, which has fallen significantly to 2.1 billion USD for 6 projects (Boston University Global Development Policy Center, 2025). This trend raises questions about the evolution or devolution of Chinese relations and suggests a steep pivot in partnerships, effectively decoupling from capital expenditure projects.

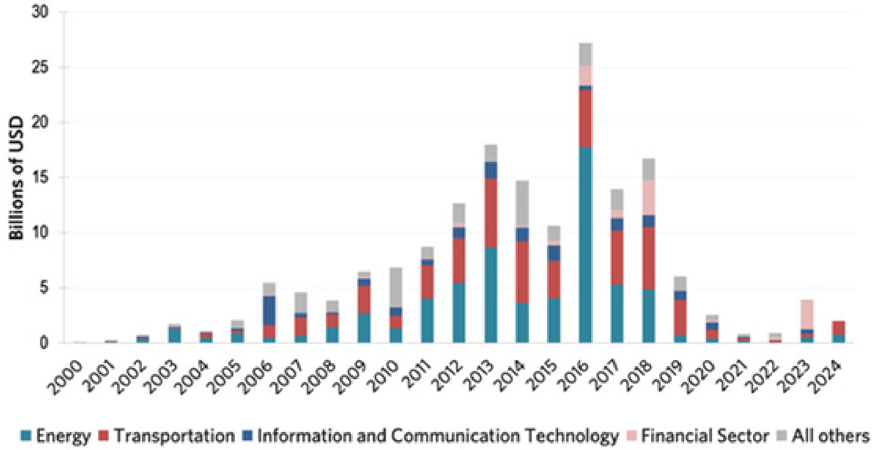

Figure 3. Chinese Loan Commitments to Africa by Sector, 2000-2024. Source: Boston University Global Development Policy Center, 2025.

6.1. Pre-2000: China-Africa Diplomatic Origins

China's rise has been accompanied by an expansion of its diplomatic relations, largely driven by economic factors. This has fostered a co-development model in its international partnerships. China-Africa relations date back to 1955, during the Bandung Conference in Indonesia (Adino–Abebe, 2025; Asnate, 2018). Although this event marked the beginning of diplomatic ties between China and African countries, it was not until 1978, during Deng Xiaoping's economic modernization efforts, that China shifted away from its strictly socialist economic planning. Following the Tiananmen Square incident, China began focusing on partnerships that would yield economic benefits and enhance its global presence through South-South cooperation (Taylor, 1998). The international community challenged China's global positioning during this period because of its questionable human rights record and domestic issues. South-South partnerships, while economically beneficial, also helped develop China's international salience through the language of development and political concessions.

6.2. 2000-2013: China and Africa's Economic Renaissance

The introduction of the FOCAC created the catalysts needed for engagement and marked a significant milestone in China-Africa relations. As a platform for engagement and policy consolidation, the FOCAC creates a multilateral avenue for cooperation and partnerships. Joining the FOCAC also shows how platforms can build clout and advance a political agenda, provided willing African partners acknowledge the One China Policy (Murphy, 2022). This is not entirely surprising given China's ambition during the early 2000s to advance its reputation on the world stage as an emerging power. With the inauguration of the FOCAC in Beijing in October 2000, it was attended by the heads of Togo, Algeria, Zambia, and Tanzania, among other regional representatives, totaling 80 representatives from China, 44 from Africa, and 17 from international and regional organizations (Xinhua News, 2000). The FOCAC has borne fruit, with the initial $5 billion loan in 2006 growing to $12.8 billion by 2013 for 72 projects (Boston University Global Development Policy Center, 2025). Trade also accelerated during this period: from 2000, bilateral trade between China and Africa stood at only 10 billion USD, which rose drastically to 198.5 billion USD in 2012 (Australian Center on China in the World, 2013).

6.3. 2013-2018: One Belt, One Road and the Golden Age of China-Africa Relations

The 2000s can be viewed as a significant breakthrough period for the diplomatic and economic partnership between China and Africa. Although the partnership officially began during this time, its most productive years occurred between 2013 and 2018, which saw the highest number of projects and loans since 2000. This period marked the consolidation of the partnership, highlighted by the launch of the Belt and Road Initiative in 2013, aimed at establishing the "21st Century Maritime Silk Road." These loans primarily focus on enhancing the region's industrial capacity and infrastructure to support the adoption of more advanced products, services, and processes (Dollar, 2019).

Sector	**Number of loans**	**Cost in USD**
Energy	91	44.3B
Transportation	176	31.0B
Information and Communications Tech	50	6.6B
Financial Sector	28	6.5B
Water, Sanitation, and Waste Management	56	4.8B
Other	34	4.6B
Industry, Trade, Services	26	3.5B
Social Protection	18	1.5B
Defense and Military	7	1.2B
Public Administration	16	722.3M
Education	9	650M
Agriculture	5	371.8M
Health	5	257.0M
Non-Energy Mining	5	142.6M
Total	**526**	**106.1B**

Table 4. African loans from China 2013-2018—source: Boston University Global Development Policy Center, 2023.

China's investments in Africa expand its supply chain networks by securing raw materials, intermediary goods, oil, and precious metals, while also flooding the African region with economic surpluses and overlooking human rights issues in Sudan and Zimbabwe (Smith, 2010). While critics highlight the damaging effects of the partnerships due to the extractive nature of resource-for-infrastructure deals with China, as well as its predatory debt-trap conditions, there is clear evidence that debt distress is driven by weak governance structures and financial management (Nhliziyo–Ncube, 2025). While Chinese loans are easier to access and carry fewer conditions than loans from the West and can contribute to economic maturity and advancement, reliance on loans should be moderated, as debt conditions due to defaults remain a possibility (Mlambo, 2022).

6.4. 2019- Present: China's Tapering, Decoupling, or Pivot on Africa?

The COVID-19 pandemic and the post-pandemic period have created a cautiously optimistic outlook for the China-Africa partnership. However, there has been a significant shift: Chinese financing has transitioned to a net outflow of $22 billion, surpassing lending levels from 2020 to 2024 (African Security Analysis, 2026). This drastic change reflects the pandemic's unpredictable impacts, resulting in a decline in Chinese loan commitments from 2020 onward, which fell short of the high levels recorded between 2013 and 2018. Additionally, the financing landscape has shifted toward restructuring loans from USD-denominated amounts to Renminbi (Taylor, 2025).

Although analysts point to warning signs of potential Chinese decoupling, the tapering since 2019 has been influenced by external events that have affected economies worldwide. These changes significantly affect official development strategies aimed at addressing domestic economic challenges (Wang–Zhang, 2021). China's prolonged recovery provides an opportunity to recalibrate and refine its strategy in Africa. A decade after launching the Belt and Road Initiative, China has chosen to streamline its project allocations. Despite potential adjustments, bilateral trade between China and Africa continues to grow. In 2025, total trade reached 222.05 billion USD, reflecting a 15.4 percent year-on-year increase from January to August. However, this growth comes with a trade deficit of 59.55 billion USD during the same period (African Security Analysis, 2026). The trade deficit critique of China and its flagship development assistance program has been considered a widespread pattern across partner countries based on 2013-2021 data, observed in Angola (-34 percent), Kenya (-106 percent), Kyrgyzstan (-47 percent), Pakistan (-164 percent), and Sri Lanka (-41 percent); with Myanmar (+52 percent) demonstrating a contrarian trend after improving its deficit upon the completion of two oil and natural gas pipelines (Chang, 2022). In 2024, China accounted for 22 percent of Africa's trade and, concerningly, 63 percent of the continent's trade deficit (Ngundu, 2025). However, the trends observed in African countries should not be interpreted as evidence of malicious intent or complacency. Many Belt and Road projects are still ongoing or have been delayed by the pandemic, as well as other factors such as domestic crises and regime instability.

China's current tapering reflects the recalibration of the Belt and Road Initiative, as projects are completed and contribute incrementally to overall trade health and the bilateral benefits of the development packages over a decade. For one, decoupling is not evident because trade traffic between China and Africa is increasing, which underscores the impact of Chinese investments in African countries by providing greater access to roads, stronger industrial capacity, and capital infusion. Instead, China is not pivoting or decoupling; it is recalibrating its development projects in response to mixed results across Africa and other partner regions and countries.

7. Economic and Infrastructure Engagement

The most visible elements of Chinese presence are economic and infrastructure projects in the region, and this involvement also appears in intergovernmental agreements, bank loans, state-owned construction companies, and increasingly diverse and expanding commercial, industrial, and technological relations. In the previous subsections, we highlighted Chinese financing and loan agreements, which show that Chinese presence has become predominant mainly in capital-intensive sectors, has long payback periods, and is considered high-risk by traditional private investors (Tarrósy–Vörös, 2025). Significant, priority projects in the region include the standard-gauge railroad from Mombasa to Nairobi in Kenya, the light rail in Addis Ababa, and the electrified railroad line connecting Ethiopia with Djibouti. The economic significance of the projects is theoretically clear; the transport corridors connect domestic (internal) areas with maritime trade routes, thereby enabling the expansion of internal markets and reducing the costs of export and import activities. However, implementation has occurred within bilateral intergovernmental frameworks, with no unified regional framework or program; as a result, the rules remain national, and the infrastructure is not regional in scope.

7.1. Ethiopia as the Center of China's Regional Infrastructure Policy

Ethiopia occupies a special place in China's policy in the Horn of Africa. The country is simultaneously one of Africa's most populous states, the headquarters of the African Union, and a key political player in the region. With Eritrea's independence in 1993, Ethiopia lost its direct access to the sea, and the Ethiopian-Eritrean war between 1998 and 2000 further strengthened Djibouti's strategic significance. Since then, most of Ethiopia's foreign trade has passed through Djibouti's ports, making transportation infrastructure not only an economic issue but also a matter of sovereignty and security. During the state-led developmental strategy, which also drew from East Asian models, the country's economic concepts were based on state-directed investments, industrial policy, and large-scale infrastructure development. China proved a particularly important partner because it offered rapid implementation, large-scale financing, and fewer political conditions than Western development sources (Tarrósy–Vörös, 2026). The Addis Ababa light rail modernized the capital, the Addis Ababa–Djibouti railroad ensured maritime access, and the industrial parks facilitated export-oriented industrialization.

7.2. The Addis Ababa Light Rail

The Addis Ababa Light Rail Transit, or AALRT, was the first modern, fixed-track urban transit system in sub-Saharan Africa. Construction began in 2011, and the two lines began operating in 2015. The total cost of the 34.4-kilometer system was approximately 475 million US dollars, 85 percent of which was covered by a concessional loan from the Chinese Exim Bank (Tarrósy–Vörös, 2018). The China Railroad Group carried out the construction, and the vehicles and technical system also came from China (Tarrósy–Vörös, 2026).

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The project achieved symbolic success but remained politically and economically questionable: the elevated tracks running through the city became striking symbols of modernization, technological advancement, and state capability, yet the system failed to meet expectations, and design and sustainability issues gradually emerged during operation. The network covered a limited area, so it could not significantly replace transportation based on minibusses, taxis, and private cars. In some sections, the tracks crossed or separated from the roads, which in some places did not reduce but instead further complicated traffic. Pedestrian accessibility at stops, traffic-light functionality, and connecting infrastructure also remained inadequate (Ibid.). The system began operations with 41 vehicles, but by 2023, only 16 vehicles were in operation during peak hours, and the daily ridership continued to decline: issues such as the uncertainty of electrical supply, overloading, a shortage of spare parts, weak maintenance capacity, and inadequate ticket inspection and revenue collection all exacerbated the problems. The estimated cost of the parts needed to restore the malfunctioning vehicles reached 60 million dollars, which is nearly 13 percent of the total investment value (Ibid.).

These operational limitations are also reflected in passenger-side evaluations. Obsie, Woldeamanuel and Woldetensae (2020) demonstrate that the performance of the AALRT cannot be assessed solely through infrastructure provision: reliability, accessibility, service frequency and the broader quality of the passenger experience are central to whether the system fulfills its urban-development function.

The case of the light rail clearly demonstrates that the physical completion of an infrastructure is not the same as its successful social and economic embedding. The AALRT provided a cheap and potentially high-capacity mode of transport. However, because of the network's limited extent, low operational reliability, and persistent maintenance dependency, it failed to meet the original expectations. The project can therefore be seen both as a striking symbol of modernization and as an example of inadequate feasibility planning.

7.3. The Addis Ababa–Djibouti railway

The economic and geopolitical significance of the Addis Ababa-Djibouti railroad surpasses that of the light rail. The 756-kilometer electrified line connects Ethiopia's economic center with the ports of Djibouti, through which more than 90 percent of Ethiopia's imports and exports pass. The primary goal of the railroad was to create a commercial corridor that is faster, cheaper, and has a larger capacity than road transport.

The line was built between 2011 and 2016, with total costs estimated at $4.5 billion. The Chinese Exim Bank provided approximately 2.4–3 billion in financing. The railroad opened in 2016, but regular operations began in January 2018. A consortium of China Railroad Group and China Civil Engineering Construction Corporation carried out the construction and initial operation. The two companies were also responsible for training the local staff and gradually transferring operational knowledge. The operating rights were transferred to the Ethio-Djibouti Railroad Company, which is 75 percent Ethiopian and 25 percent Djiboutian, at the end of 2023. At the time of the handover, around eighty Chinese experts were still expected to provide additional technical assistance. This suggests that the formal transfer of ownership and operation did not immediately end the technological and professional dependency (Tarrósy–Vörös, 2026).

The project's integration and economic impacts were significantly limited because, contrary to the original plans, depots, branch lines, and loading facilities were not built, which would have made the main line usable for intermediate regions as well. The challenge was therefore not merely transferring railway technology, but establishing the institutional and managerial capabilities required to absorb and operate it independently. Chen (2022) similarly identifies the development of managerial infrastructure and domestic technical expertise as a long-term challenge for Ethiopia's railway institutions. As a result, economic revenues remained limited, although it is evident that in recent years there has been a more significant development along and around the railroad line: roads, shops, residential, and economic facilities have appeared in the vicinity of the Addis station, meaning that the railroad junction has begun to become a local development hub. Freight transport increased by approximately 22 percent on average annually after 2020, surpassing two million tons in 2023. About 95 percent of the railway's revenue came from freight transport. Among the transported products were fertilizers, coffee, cooking oil, vehicles, and steel products, and the number of business partners exceeded one thousand (Tarrósy–Vörös, 2026).

Despite the growth, traffic still fell short of the project's initial, highly ambitious expectations. The Addis Ababa-Djibouti railroad cannot be considered a failure, but it has not yet reached its full development and integration potential. For long-term effectiveness, it is necessary to develop branch lines, logistics centers, and industrial connections, further expand freight transport, and strengthen local technical and managerial capacities.

7.4. The regional integration constraints of infrastructure

The projects examined in the Ethiopian case study have improved physical connectivity primarily within Ethiopia and along the Ethiopia-Djibouti corridor. More broadly, they illustrate a regional pattern in which Chinese-financed infrastructure has strengthened selected nodes and corridors without producing an integrated region-wide infrastructure network. We can certainly discuss development, but these investments have not consistently contributed to sustainability. Some projects are economically questionable, and it can be argued that these investments did not necessarily result in deeper regional integration – unless we consider the closer relationship between Ethiopia and Djibouti as an example of that integration. The Ethiopian cases also reflect broader challenges identified in Africa's contemporary railway renaissance: infrastructure expansion has often advanced more rapidly than technological integration, operational planning, regulatory coordination and sustainable demand generation (Bouraima et al., 2023).

The limited integrative impact of Chinese infrastructure must also be interpreted against pre-existing regional constraints. Political instability, interstate and intrastate conflicts, overlapping institutional memberships, and weak infrastructure have long constrained the regional integration process independently of China's involvement (Gardachew, Kefale & Antigegn, 2019).

These findings should therefore be interpreted as evidence of the opportunities and limits of infrastructure-led integration rather than as evidence that Chinese projects across the Horn of Africa have produced identical outcomes.

On the one hand, project distribution is highly uneven, as China has primarily made significant investments in relatively stable countries with larger markets, stronger state capacities, or strategic locations, especially in Ethiopia, Kenya, and Djibouti. In contrast, in Somalia or South Sudan, where conflict-affected areas are more widespread, much more limited infrastructural results were achieved; the regional network remained fragmented, and in many cases, we cannot even speak of real plans to continue these projects. On the other hand, the investments served national goals, whether economic or prestige-driven, rather than regional cooperation and division of labor. Therefore, according to Adino and Abebe's assessment, the bilateral approach, the lack of a coordinated roadmap, the fragmentation of Chinese financing institutions, and the inadequate handling of peace and security conditions all contributed to the limited integration impact of Chinese infrastructure (Adino–Abebe, 2025). This brings us back to Schiere and Rugamba, who argued that Chinese engagement may (while supporting national needs) limit the treatment of genuinely regional problems (2011).

Chinese projects have thus created corridors, such as the electrified railroad line connecting Mombasa and Nairobi in Kenya, as well as the one connecting Ethiopia and Djibouti, which could serve as the basis for regional connections. However, these have not yet materialized, and for example, the Addis Ababa-Djibouti railroad did not automatically create a regional customs union, common market, or harmonized trade system between the two countries, highlighting that connectivity is merely the first step toward deeper cooperation. A transport corridor should therefore be understood as more than a linear piece of infrastructure. Corridors become developmentally and regionally transformative only when the principal route is embedded in wider logistical, commercial, institutional and settlement networks (Lamarque-Nugent, 2022). The missing branch lines, depots and industrial connections of the Addis–Djibouti Railway precisely illustrate this distinction.

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Moreover, finally, the gap between physical connectivity and economic transformation has also been identified at the broader BRI level. Carmody, Taylor and Zajontz (2022), examining projects in Kenya, Djibouti and Ethiopia, questioned whether debt-financed connectivity can generate structural transformation in the absence of stronger productive linkages and financially sustainable project models – bringing us to a further aspect of the Chinese presence.

8. Debt, Development Effects, and Local Perceptions

Chinese infrastructure projects cannot be interpreted solely in terms of physical presence and connectivity; the financial sustainability of the projects, their long-term developmental impact, and how local communities, workers, passengers, entrepreneurs, and political actors perceive Chinese presence are also important.

8.1. Debt and financial sustainability

Chinese loans have enabled the implementation of projects for which the regional states had limited internal resources and for which traditional Western lenders were not always willing to provide financing. At the same time, large-scale, long-term infrastructure has resulted in significant foreign-currency debt, while project revenues often accrue in local currency and fall short of expected levels. Local currency depreciation, insufficient export revenues, and economic crises can therefore significantly increase the actual cost of repayment.

The Ethiopian projects particularly illustrate this problem, as neither the light rail nor the railroad generates sufficient revenue to cover the investment costs and loan repayments. In the case of the light rail, the project's public-service nature inherently limited direct profitability, while low passenger numbers, ticket-collection issues, and high maintenance costs further worsened the financial balance. In the case of the international railroad, delayed departures, missing connecting lines, and low initial freight volumes hindered revenue generation.

Due to repayment issues, Beijing was open to restructuring (Tarrósy–Vörös, 2026), but the problem of indebtedness also became a reality for other projects: a significant portion of Djibouti's external, state or state-guaranteed debt was linked to Chinese financiers, prompting the government to initiate negotiations to reschedule certain obligations. Kenya also sought more favorable financing conditions for the next phases of its railroad investments. Chinese lenders have become more cautious in recent years, shifting from previous trends and paying greater attention to project viability and the debt sustainability of host countries.

At the same time, we cannot say that the Chinese steps are part of "debt trap diplomacy"; Chinese creditors have been open to rescheduling, restructuring, and even partially forgiving debts – and as we pointed out, regional actors have actively participated in selecting and shaping the projects. Evidence from Chinese debt renegotiations also calls for a distinction between debt distress and deliberate asset-seizure strategies. Acker, Bräutigam and Huang (2020) find that Chinese lenders have frequently rescheduled repayment obligations in distressed cases, while their African cases provide no evidence of systematic asset seizures as a consequence of default. Consequently, serious debt sustainability problems should not be conflated with evidence of a predetermined Chinese "debt-trap" strategy. Singh (2021) similarly argues that the debt-trap framework inadequately captures the more complex political economy of Chinese development finance.

However, the debt problem is not merely a Western narrative; high debt can indeed constrain the budgetary flexibility of recipient states, increase dependence on Chinese financing, and limit future development decisions. The risk, therefore, does not primarily stem from the lender's presumed intentions, but from the relationship between the project and the economy. The key question is whether the loan-financed investment can create new production capacity, export revenue, tax revenue, or measurable social benefits in line with the intended goals. If the project is not properly connected to the industrial, logistical, and commercial systems, the debt remains while the expected economic impacts are only partially realized – a good example of this is the Addis Ababa-Djibouti railroad line.

8.2. Developmental and social impacts

The Chinese projects have also created tangible development results, but instead of reiterating these, it is worth highlighting that one of the key elements of the development value of the projects should be knowledge and technology transfer. In both Ethiopian examples, we saw that transferring operational, maintenance, and management tasks to local professionals was a stated goal. The process yielded tangible results, but the handover was not complete. At the same time, the lack of spare parts and specialized maintenance knowledge became a persistent problem for the light rail, while the international railroad continued to rely on Chinese experts even after the formal handover of operations. The physical transfer of technology thus proved faster than establishing the institutional and professional capacities necessary for operation (Tarrósy–Vörös, 2026).

8.3. Local perceptions, everyday experiences

Local opinions on Chinese presence cannot be uniformly categorized as positive or negative. Public officials, business actors, workers, passengers, and nearby communities evaluate the same projects based on different criteria. Local perceptions are generally more positive where Chinese investments create visible public services, jobs, or economic opportunities, and they can become more negative if the population experiences operational disruptions, unequal access, poor working conditions, or low local participation. For the local population, the value of infrastructure is ultimately determined not by construction costs or diplomatic significance, but by everyday usability. This issue also appears at the level of social ownership: one local participant in a field study pointed out that some do not feel a sense of ownership over public infrastructure and therefore do not necessarily consider vandalism or theft as acts against the community. Vandalism of stops, littering, theft of cables and parts, and neglect of the track environment suggest that the technical investment was not always accompanied by appropriate social involvement and awareness-raising (Tarrósy–Vörös, 2026).

Broader research conducted in Africa also presents a mixed picture. Many people view the Chinese economic development model positively, especially its rapid infrastructure implementation. At the same time, critical opinions also emerge regarding Chinese companies' labor practices, the treatment of local workers, cultural distance, and a lack of transparency. Local perceptions are therefore generally less negative than some Western narratives suggest, but also less positive than official Chinese communication based on "mutual benefits" claims. Broader empirical research across Africa confirms this ambivalence. Chinese infrastructure and China's economic development model are often evaluated positively, while labor relations, cultural distance, transparency, product quality, and the behavior of individual Chinese companies generate more critical assessments. African perceptions are therefore neither uniformly hostile nor uniformly favorable, and tend to be more differentiated than either strongly critical Western narratives or official Chinese "win-win" rhetoric imply (Sautman–Hairong, 2009; Wang–Elliot, 2014; Lekorwe et al., 2016; Amahazion, 2021; Cissé et al., 2023). Regional evidence reinforces this differentiated picture. In Amahazion's (2021) survey of 237 Eritrean students, 70 percent evaluated China's influence on Eritrea positively, and 71 percent expressed satisfaction with Chinese-supported projects, yet only 18 percent regarded Chinese products and services as high quality. Positive attitudes toward China as a development partner therefore do not necessarily imply uniformly positive evaluations of Chinese economic activity.

Overall, Chinese infrastructure in Ethiopia and the Horn of Africa has created real but uneven development impacts. The projects improved physical connectivity, created new transportation and economic capacities, and strengthened Ethiopia's connection to the ports of Djibouti. At the same time, debt burdens, inadequate planning, maintenance issues, partial technology transfer, and weak social embedding limited the transformative outcomes: the two Ethiopian railroad projects are transformative in intention and political framing, but only partially so in implementation and actual results (Tarrósy–Vörös, 2026).

9. China's military presence and the connection between security and development in the region

Recently, it has become increasingly evident that China's presence also needs to be examined through a security lens. The country's military capabilities and presence are growing, but we still cannot say that Beijing has a comprehensive regional military strategy, nor can we speak of Chinese military dominance.

9.1. The emergence of security interest

China's strengthening security role in the Horn of Africa can be attributed primarily to its growing economic presence. With the growth of Chinese companies, infrastructure projects, loans, trade routes, and citizens, Beijing has gained a more direct interest in the region's stability. Given the emerging interests, it was to be expected that their protection would also become important for Beijing. Therefore, the security dimension cannot be separated from the BRI's economic-geo-economic logic: creating infrastructure and deepening trade relations simultaneously require protecting established connections, maritime routes, investments, raw material deposits, pipelines, and foreign Chinese interests. All this is particularly important in the case of the Horn of Africa region, considering the security challenges faced by the states in the area (Eickhoff –Godehardt, 2022; Kyirewiah–Attah, 2024), while also taking into account that the Asia-Europe, and within that, the China-Europe trade passes through the Gulf of Aden, the Bab el-Mandeb Strait, the Red Sea, and finally the Suez Canal. The region combines interstate disputes and domestic armed conflicts with violent extremism, piracy, political instability and recurrent threats to foreign personnel and infrastructure, creating a security environment in which expanding economic exposure increasingly generates protection requirements for China as well (Eickhoff–Godehardt, 2022).

The previously presented trade and simulation data indicate that the persistent disruption of these chokepoints not only affects the coastal countries but also directly impacts Chinese and global supply chains. In addition to investments in the region, the protection of trade routes passing through the area is therefore not an abstract geopolitical goal for Beijing, but an increasingly concrete economic interest – and it is worth returning to the changes in the world order here as well: as uncertainty grows over the future distribution of maritime-security burdens, Beijing has stronger incentives to develop autonomous capabilities that enable it to protect Chinese citizens, investments and critical overseas trade routes without relying exclusively on other security providers (Wuthnow, 2020; Eickhoff–Godehardt, 2022).

In this sense, the "securitization" of China's involvement is primarily a consequence of economic exposure and, secondarily, of global great-power rivalry. The same pattern can be identified in another African region, the Sahel: China's primary interests remain economic and diplomatic, but instability, the threat to Chinese citizens and companies, and the potential disruption of raw material and trade routes gradually increase Beijing's compulsion to engage in security roles (Vörös–Cabestan, 2025).

9.2. From Multilateral Security to Djibouti

One of the first significant manifestations of China's security policy presence in Africa was its participation in multilateral operations. Compared with China's previous, more restrained UN policy, the country has gradually shifted toward greater participation in peacekeeping missions (Vörös–Tarrósy, 2020; United Nations Peacekeeping, 2026), including MINUSMA in Mali and UNMISS in South Sudan. These participations clearly illustrate the characteristics of China's approach: Beijing is primarily willing to take on a security role through multilateral structures that do not force it into classic unilateral military interventions. This strategy allows China to present itself as a responsible great power while indirectly fostering a stable environment that supports its economic interests (Vörös–Cabestan, 2025).

From the perspective of the Horn of Africa, South Sudan is particularly significant, as the country is a member of the Intergovernmental Authority on Development (IGAD). Chinese economic interests and security involvement in South Sudan are directly intertwined. China's participation also reflects a shift away from the traditional principle of non-interference, or non-intervention in the internal affairs of other countries, which has become more flexible in practice. South Sudan serves as a clear example of this change. As China's economic interests and political stakes in the country increased, Beijing began to move beyond a strictly interpreted non-interference doctrine. This shift included mediation, peacekeeping, and more active diplomatic engagement, while framing these actions as compatible with the host state's sovereignty (International Crisis Group, 2017). Beijing has not abandoned this foreign policy principle, but protecting its economic interests, citizens, and partner states increasingly creates situations where some form of diplomatic, peacekeeping, or security activity becomes necessary (Vörös–Eszterhai, 2026).

Djibouti could still be the turning point in this region. China opened its first overseas military-logistics facility in the country in 2017. In Chinese terminology, the facility is not a "military base" but a support or logistics facility, with official duties including maritime escort operations, supporting peacekeeping, humanitarian operations, evacuation tasks, joint exercises, and maintaining the security of strategic maritime routes (Ibid.). At the same time, the facility's continued development, expanded port capacity, and geostrategic location clearly enhance the Chinese Navy's operational and force-projection capabilities in the region. Djibouti's significance is further enhanced by the fact that China is not the only country with a military presence there. The United States, France, Japan, Italy, and certain formations of other external actors are also present in the country. Djibouti should therefore not be interpreted solely as a Chinese military outpost. The co-location of American, Chinese, and other foreign forces creates a distinctive security environment in which operational cooperation, strategic surveillance, and great-power rivalry coexist

(Melese, 2022). The Chinese facility therefore simultaneously serves, and can serve, a functional role in protecting shipping and Chinese interests, while also becoming part of global great-power competition.

9.3. Multilateral Preference and Its Limitations

What can be said about the Sahel region is also true for the Horn of Africa: Beijing does not show a clear willingness to bear the costs of ensuring regional security on its own. In the Sahel, Beijing has supported the African Union, the UN, ECOWAS, and previously the G5 Sahel, while its own military role has remained limited. This behavior is partly due to the limitations of its military experience and capabilities, partly to the principle of non-intervention, and partly because Beijing seeks to avoid prolonged and costly foreign military commitments whenever possible (Vörös–Cabestan, 2025).

The lesson from the Horn of Africa is that China's increasing influence should not be seen as a sign that it is establishing a global military network similar to that of the United States. Beijing has generally taken on security responsibilities that align with its specific interests, including protecting maritime trade, ensuring the safety of Chinese citizens, participating in peacekeeping missions, and safeguarding regions where it has investments or other strategic economic interests (Vörös–Eszterhai, 2026). Evidence from the Horn of Africa itself supports this cautious interpretation. China's mediation practice has generally remained facilitative and consent-based, emphasizing dialogue and conflict containment rather than assuming extensive responsibility for the substantive terms or enforcement of political settlements (Eickhoff–Godehardt, 2022).

In this regard, a significant difference exists between the increase in security presence and the role of a regional security hegemon. The first is clearly observable; there is currently insufficient evidence for the second, with China's security role in the Sahel being considered secondary compared to its economic and diplomatic presence, highlighting that local or Chinese-affiliated private security actors are often involved in the protection of Chinese companies, and Beijing does not engage in direct, extensive unilateral military interventions (Vörös–Cabestan, 2025).

9.4. The issue of arms trade

China's security presence is not limited to peacekeeping and maritime operations; it also plays a role in arms trade and by 2023 "China overtook Russia as the Subsaharan Africa region's main supplier of major arms", accounting for 19% of the deliveries according to the latest data from the Stockholm International Peace Research Institute (SIPRI, 2024; Vörös–Cabestan, 2025: 177) – thus, Beijing is becoming an increasingly significant player in this area as well.

This phenomenon suggests a duality that can be understood through economic interests and stakes. Our main assertion is that it is fundamentally in Beijing's interest to maintain stability, as infrastructure, trade routes, and Chinese companies' operations rely on a predictable political environment. However, arms exports – particularly to unstable regions – can have destabilizing or escalating effects. The coexistence of arms exports and stability-oriented diplomacy illustrates that a single security logic does not govern China's Africa policy. Commercial, diplomatic and strategic objectives coexist and may, in individual cases, generate contradictory effects.

9.5. Djibouti - Great Power Competition or Common Security Interest?

Chinese presence in Djibouti is often interpreted as part of the U.S.-China strategic rivalry, and this perspective cannot be ignored. A Chinese military facility operating near one of the world's most important commercial maritime chokepoints enhances Beijing's intelligence, logistics, and naval capabilities, while limiting the possibility of any other external power exerting exclusive strategic influence in the region. At the same time, they share a significant interest: maintaining the navigability of the Bab el-Mandeb, the Gulf of Aden, the Red Sea, and the Suez Canal. In the case of piracy, terrorism, or interstate conflict, the United States, China, the European Union, the Gulf states, and the countries of the region itself all suffer losses. Maritime security is therefore an area where great-power rivalry and the necessity of cooperation coexist.

The following comparative geographical matrix (*Table 5.*) illustrates this duality: to analyze China fully, its presence in the Horn of Africa should be examined through three main strategic pillars: geostrategic competition, economic supply chain positioning, and national defense posturing.

9.6. Security engagement and regional integration

The increase in China's security role ultimately connects back to the study's central question: regional integration. As with Chinese infrastructure, no automatic spillover effect is observed regarding security presence. While China can contribute to securing maritime routes, send peacekeepers, provide training, or support regional and continental institutions, none of these actions alone strengthens entities such as IGAD as a regional security community. Moreover, one paradox of the Chinese approach is that while Beijing rhetorically supports multilateral solutions and African regional institutions, its specific economic and security relations often continue to take place within bilateral intergovernmental frameworks.

In the Sahel region, we can observe a similar trend: China supports regional organizations, but when these organizations become dysfunctional or politically divided, Beijing pragmatically shifts back to bilateral relations with more stable partner states (Vörös–Cabestan, 2025). This aspect could be significant in this area; China's primary interest lies not in establishing a strong IGAD, but in ensuring a stable regional environment that allows Chinese trade routes, infrastructure, and economic interests to thrive. These two interests may coincide in certain cases or periods, but this coincidence is not necessarily or regularly the case. Just as infrastructural developments can achieve certain nation-state goals and showcase Chinese interests without necessarily strengthening regional cooperation, security solutions do not necessarily entail regional solutions, cooperation, or shared thinking.

Area	Geostrategic Competition	Economic Supply Chain Positioning	National Defense Posturing
The Red Sea	Strategically important for states (DESSEY) and globally critical for trade flows, the Red Sea's instability will trigger inflationary and supply risk globally	Countries surrounding the Red Sea need to maintain order, and it is in their best interest to protect and maintain its availability	Attacks in the Red Sea place a high cost on freight operators, causing trade disruptions necessitating coordination among bordering nations
Gulf of Aden	The Gulf as an entryway to the Red Sea and an important trade and economic lifeline for Djibouti and Somalia has forced joint patrols and operations not only from the US, EU, and China, but also from the UAE	Because of the case in the Gulf, operational guidelines were created, such as the Best Management Practices (BMP5) and the Maritime Security Transit Corridor (MTSC)	Infamously regarded as one of the most dangerous sea routes, the Gulf of Aden has been aided by NATO and the international community with the Djibouti Code of Conduct and the succeeding Jeddah Amendment Various coalitions were created for patrols by EU Naval Force (NAVFOR) and the Combined Maritime Forces (CMF)
Bab El-Mandeb	Chokepoint connecting the Mediterranean and the Red Sea, with the Port of Djibouti being the main port of interest for great power competition, specifically for China and the United States	Considered one of the most dangerous passages in the world; threats or attacks in the strait will paralyze the transit of trade towards the Suez Canal, impacting supply and demand in the global market	Critical point which Iran has warned of using during its conflict with the US/Israel, utilizing its clout with Yemen and the Houthis The military presence of China and the United States reinforces the significance of the regimes around the chokepoint and the stability of the passage
Suez Canal Route	Connecting the Red Sea to the Mediterranean, 12% of annual global trade passes through the route, and 30% of global container traffic	One of the world's most important economic arteries, the Suez Canal, must be maintained and protected, with 12% of global trade relying on its operations	Conflict in adjacent routes will impact traffic in the Suez Canal, paralyzing trade in the region and forcing a reroute to the Cape of Good Hope, causing delays in global supply chains and inevitably driving costs

Table 5. Security interests of China in the Horn of Africa Region - Comparative Geographic Matrix. Source: Edited by the authors.

There is therefore no necessary progression from Chinese security engagement to stronger regional security integration. Indeed, additional external initiatives can themselves contribute to institutional fragmentation when they operate parallel to, rather than through, existing regional mechanisms. The key issue is not simply whether China contributes resources to regional security, but whether such engagement strengthens the coordinating capacity and political relevance of organizations such as IGAD (Schiere–Rugamba, 2011; Eickhoff–Godehardt, 2022; Adino–Abebe, 2025).

In any case, it is becoming increasingly clear that in the region, China is gradually transforming from a predominantly economic actor into a security-development actor, but this transformation is not complete. The Djibouti facility, maritime operations, UN peacekeeping, and increasing military cooperation demonstrate the expansion of China's great-power capabilities, but Beijing continues to avoid assuming a comprehensive regional security provider role and, wherever possible, seeks to manage security risks through multilateral or local partners. This reflects the same pattern observed in the Sahel: the security role is increasing as China's interests grow, but it remains a dimension that serves, rather than replaces, economic and diplomatic presence (Vörös–Cabestan, 2025).

10. Conclusion

China's deep relationship with the Horn of Africa region has often been vilified yet has had clear tangible impact, from economic cogeneration of value through trade, infrastructure, and aid, to various aspects of security, including but not limited to energy, human, and traditional security through peacekeeping, anti-piracy campaigns, and arms trade.

Beijing's involvement in the region is evolving from a primarily economic and infrastructure-focused engagement toward a more comprehensive role in security and development. This transformation, however, remains incomplete. Economic interests continue to form the foundation of Beijing's regional engagement. At the same time, its expanding security activities are self-motivated and primarily serve to protect trade routes, investments, citizens, and strategic access rather than provide comprehensive regional security.

The analysis further suggests that the growing security dimension should not be interpreted as a replacement of China's economic engagement, but as its extension. As their investments, companies, citizens and trade routes have become more exposed to the region's political and security risks, economic presence itself has generated new protection requirements. In this sense, the securitization of China's engagement is primarily a consequence of expanding economic exposure and only secondarily a manifestation of great-power rivalry.

Regarding development, the findings are similarly mixed but clearly not negligible. Chinese-financed infrastructure has generated tangible gains in physical connectivity, transport capacity and access to maritime trade routes. At the same time, the Ethiopian cases demonstrate that infrastructure construction alone does not guarantee developmental transformation. Missing additional infrastructure, operational deficiencies, maintenance problems, incomplete technology and knowledge transfer, and weaker-than-expected revenues have constrained the broader developmental effects of both railway projects. China improved connectivity, but the projects were neither designed nor institutionally embedded primarily as regional-integration instruments.

The findings regarding regional integration are largely negative. Although physical connectivity has improved, this has not led to deeper institutionalized regional integration. The projects analyzed in this study have mainly resulted in bilateral corridors and infrastructure that focus on national rather than regional needs. Their implementation has primarily followed project-specific bilateral agreements and national development priorities, rather than a cohesive, region-wide strategy.

This outcome, however, cannot be attributed to China alone. Political instability, interstate and intrastate conflicts, weak institutional capacities, competing national interests and limited regulatory harmonization have constrained regional integration independently of Chinese involvement. Chinese engagement has therefore interacted with – rather than created – an already fragmented regional environment.

From a theoretical standpoint, the findings support the expectation that increased functional connectivity can lead to deeper regional integration. However, physical links are necessary but not sufficient. Without complementary institutional coordination, regulatory harmonization, productive linkages, domestic capacity, and a stable security environment, connectivity does not automatically translate into regionalization or institutional integration.

Additionally, it is important to avoid interpreting these outcomes through a one-directional model of Chinese influence. Although the resulting relationships are asymmetric, Beijing does not dictate them alone.

This broader role also increasingly corresponds to China's great-power interests. The strategic importance of the Red Sea–Bab el-Mandeb–Gulf of Aden–Suez corridor means that protecting regional infrastructure and maritime connectivity is simultaneously a development issue, a commercial interest, and a question of national strategy for Beijing.

Coming back to the main research question, what we can see is that China's presence in the Horn of Africa has gradually moved beyond the predominantly economic and infrastructure-centred engagement that characterized its earlier role in the region. Beijing is increasingly becoming a security-development actor, although this transformation is far from complete. Economic interests continue to provide the basis of Chinese engagement, while the security dimension has expanded largely because these interests, investments, citizens and trade routes increasingly require protection. In this sense, China's growing security role should primarily be interpreted as an extension of its economic presence rather than as evidence that Beijing is seeking to become a comprehensive regional security provider.

As for the first sub-question, the picture is similarly mixed. Chinese-financed infrastructure has clearly improved physical connectivity and transport capacity, most visibly in Ethiopia and along the Ethiopia–Djibouti corridor. The projects have created connections and capacities that previously did not exist, but this does not mean that their wider developmental impact has been equally strong. Operational shortcomings, maintenance difficulties, questions of financial sustainability, partial technology and knowledge transfer, and weaker local economic linkages have all limited the broader transformative potential of these investments. The Ethiopian cases therefore show both sides of Chinese infrastructure development: tangible gains in connectivity on the one hand, and clear limits to sustainability and wider developmental effects on the other.

The answer to the second sub-question is more clearly negative. Although connectivity has improved, this has not automatically translated into deeper regional integration. Most of the projects examined in the study have remained embedded in bilateral relations and project-specific arrangements, while weak regional institutions, limited regulatory harmonization, political instability and competing national priorities have continued to constrain wider regional spillovers. This outcome, however, cannot be attributed to China alone: Beijing operates in, and interacts with, an already fragmented regional environment. China has therefore become a more consequential and multidimensional actor in the Horn of Africa, but it cannot yet be described either as a regional integrator or as a comprehensive regional security provider.

China has therefore become a more consequential and multidimensional actor in the region, but not a regional integrator or comprehensive security provider.

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