



# OUTLOOK ON PEACE AND CONFLICT IN THE HORN OF AFRICA

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This edition of the Digest integrates critical updates from verified sources to provide a comprehensive, multi-dimensional analysis of the peace and conflict situation in the Horn of Africa. Key political, peace, security, economic, constitutional, and humanitarian insights have been incorporated from ongoing regional monitoring to ensure this report reflects the most current assessment of the region.

**Cover Image Source** - <https://www.aljazeera.com/video/newsfeed/2025/10/29/satellite-images-reveal-mass-killing-sites-in-sudans-el-fasher-city>

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## *The Institute for Strategic Insights and Research (ISIR)*

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The Institute for Strategic Insights and Research (ISIR) is an independent, nonpartisan organization that uses research to inform its policy advocacy work.

It undertakes impartial policy research, training and analysis to organizations and decision-makers in the horn of African region who are working toward innovative thinking to stimulate formulation of sound public policies leading to positive outcomes in the fields of peace & security, good governance, safeguarding human rights and democracy.

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*ISIR Digest*



*Satellite images reveal mass killing sites in Sudan's el-Fasher city*

# 1. Regional Overview: A Region At The Precipice

As the year comes to a close and 2026 looms near, the Horn of Africa region is faced with a convergence of interconnected political, security, and environmental catastrophes. The three primary fault lines are the geopolitical confrontation between Ethiopia and Eritrea over Red Sea access; the internal fragmentation exemplified by Sudan's civil war, the endless political transition in South Sudan, and Somalia's political deadlock and future uncertainty; and the structural challenges of climate shocks and economic instability throughout the region.

A significant trend of political entrenchment is evident, with long-serving leaders, for example in [Uganda](#) and [Djibouti](#), leveraging constitutional amendments to extend their rule. The potential for broader regional conflicts is strong, and the choices made by key leaders in the coming months will determine whether the Horn descends into a new era of conflict or begins a painstaking climb toward peace.

## 1.2 KEY INTEGRATED INSIGHTS

**Elections and Incumbency:** 2026 is an election-heavy year across the Horn. Uganda (Jan 2026), Djibouti (Apr 2026), Ethiopia (June 2026), and Somalia (May 2026) are all slated to vote. Constitutional changes have tilted the scales in favor of incumbents in several cases (e.g., Uganda's 2017 removal of age limits and Djibouti's recent removal of the presidential age cap to allow a sixth term for the current president).

**Shifting Alliances:** A tightening alignment is visible between Eritrea and Egypt around Red Sea security and shared concerns over Ethiopia's foreign policy and Grand Ethiopian Renaissance Dam (GERD) posture, while internal political maneuvering in *Djibouti and Uganda* also shapes regional outlook.

**Humanitarian Severity:** Over [42 million](#) people across the Horn of Africa region are acutely food insecure due to the intersection of conflict, climate shocks, and economic stress, and [international relief remains severely underfunded](#).

# 2. 2026 Base, Best, and Worst Case Scenarios

## 2.1 BASE CASE SCENARIO (MANAGED INSTABILITY)

The most probable potential outcome is a continuation of the grim status quo. The Sudan conflict remains a protracted stalemate; Ethiopia-Eritrea tensions simmer without exploding into full-scale war; and localized conflicts persist. The region muddles through with chronic, simmering crises and populations enduring immense suffering amidst state failure to provide solutions.

## 2.2 BEST CASE SCENARIO (CAUTIOUS OPTIMISM)

This scenario, while less probable, is the most optimistic and involves key breakthroughs. A negotiated ceasefire takes hold in Sudan; [Ethiopia seeks port access through commercial and diplomatic approaches](#); South Sudan reviews its decision to prosecute peace partners, and Somalia's political leaders agree on a negotiated electoral roadmap and make progress in its security transition. This path requires unprecedented political will and coordinated international support.

### 2.3 WORST CASE SCENARIO (REGIONAL CONFLAGRATION)

The most pessimistic outlook involves the simultaneous escalation of multiple crises. A full-scale war erupts between [Ethiopia and Eritrea](#); the [Sudan conflict fully regionalizes](#) with neighbouring country interventions; and transitional political arrangements collapse in [South Sudan](#) and [Somalia](#), creating ungovernable spaces. This would represent a catastrophic failure of diplomacy and leadership.

### 2.4 CRITICAL VARIABLES AND TRIGGERS

Key watch points for 2026 include military movements on the Ethiopia-Eritrea border, the balance of power between the Sudanese Armed Forces (SAF) and Rapid Support Forces (RSF) in Sudan, the viability of Somalia's electoral timeline, the holding of the peace agreement in South Sudan, and the severity of the upcoming rainy season. Specific political events, including the outcomes of the January 2026 Uganda election and the April 2026 Djibouti election, where incumbents are seeking re-election, will be critical indicators of regional political stability.

Potential tipping points include a major power's military intervention in Sudan or Ethiopia's pursuit of Red Sea access through military means.

## 3. Country-Specific Assessments

### 3.1 ETHIOPIA: THE OVERSTRETCHED HEGEMON

#### 3.1.1 Political and Security Landscape

Ethiopia is navigating a precarious path, simultaneously managing internal insurgencies and a high-stakes foreign policy agenda. The nation is publicly committed to the [Pretoria Agreement](#), with essential services restored in Tigray. However, this is a fragile peace. Key provisions, particularly the return of IDPs to contested areas and the full disarmament of Tigrayan forces, remain unimplemented, creating a powder keg of grievance.

The most immediate threat is the significantly escalated tension with Eritrea over Red Sea access. This pursuit, declared an "existential imperative" by Ethiopia's Prime Minister Abiy Ahmed in October 2025, has led to the exchange of warnings and [military buildups](#). Crucially, Eritrean troops remain in parts of Tigray, violating the Pretoria Agreement and highlighting the complex, three-sided nature of the original conflict.

In October 2025, Ethiopia's Foreign Minister Gedion Timothewos sent [a letter](#) to the UN Secretary-General António Guterres, accusing Eritrea of "actively preparing to wage war against Ethiopia, alluding that the Eritrean government was colluding with the Tigray People's Liberation Front (TPLF) to destabilize Ethiopia.

The reported alliance between Eritrea, TPLF, and Fano forces will lead to a devastating war with far-reaching consequences and beyond, especially if a full-scale conflict breaks out against the Ethiopian government. Internally, fighting with Fano militias in the Amhara region and with OLA in Oromia, as well as the presence of [3.3 million IDPs nationwide](#), underscores the fact that the federal government's authority is profoundly contested and eroded.

Intensified unrest in [Amhara and Oromia](#), and the stalemate in Tigray, complicate preparations for Ethiopia's 2026 general elections, with observers warning about fairness or the absence of reforms. Frictions linked to the GERD continue to shape relations with downstream states, while neighbours "coalesce" against Addis Ababa's push for Red Sea access ambitions.

### 3.1.2 Economic Outlook

Ethiopia's economy shows robust headline growth, [projected at 10.2%](#) for the 2025 fiscal year. However, macroeconomic challenges are severe: inflation, though falling, remains crippling high at 20%; a tight foreign exchange market strangles business; and security instability disrupts investment and agriculture.

The severity of the economic situation was underscored by a recent default on a [Eurobond payment](#), highlighting the government's acute fiscal constraints. The government's fiscal measures, such as new electricity tariffs, increasing fuel prices, and additional taxes, are fuelling public discontent.

The most convincing path for Ethiopia in 2026 is a gradual "dialing-down of Red Sea rhetoric " in favour of [back-channel diplomacy](#), as the immense cost of simultaneous internal and external conflict becomes untenable. The nation's economic trajectory is inextricably linked to its political future; without a genuine and comprehensive peace, its impressive growth is built on a foundation that is being simultaneously eroded from within and threatened from without.

## 3.2 SUDAN: THE EPICENTRE OF COLLAPSE

### 3.2.1 Political and Security Landscape

Sudan has ceased to function as a unified state. The civil war between the SAF and RSF has evolved into a protracted war economy. By late October 2025, the RSF controlled the entire Darfur region and key areas in Kordofan, while the SAF held the east including the country's capital, Khartoum. The conflict reached a new nadir with the RSF's capture of El Fasher on 23<sup>rd</sup> October, 2025, followed by reports of a [genocidal massacre](#) with thousands feared dead, marking one of the war's most severe atrocities.

All mediation efforts, including the [Jeddah Declaration](#), have failed, with external interference from multiple regional actors complicating any resolution. The state has functionally disintegrated. Recent efforts have given a glimmer of hope, with latest developments indicating that the RSF would agree to [QUAD's proposal](#) for a humanitarian truce.

### 3.2.2 Humanitarian and Economic Crisis

The situation is cataclysmic. Famine conditions have been declared, coupled with cholera outbreaks and the collapse of healthcare. [Over 8 million](#) people are internally displaced, with a further 2 million becoming refugees, placing an immense strain on neighbouring countries like Chad and South Sudan. The formal economy has collapsed; inflation exceeds 300%, and essential services are non-functional in the active conflict zones. The prognosis is *unambiguously bleak*: continued, protracted war. Sudan will not be a player in regional politics in 2026 but will remain the primary exporter of instability, its collapse creating a vacuum that will inevitably suck in its neighbours and turn a civil war into a sustained regional proxy conflict.

## 3.3 SOMALILAND: A PROLONGED PATIENCE

### 3.3.1 Political and Security Landscape

Somaliland enters 2026 in an "offensive posture"; its momentum for international recognition has significantly improved, with increased global calls on Somaliland's agenda. The increasing engagements with the new US administration, along with reported military and diplomatic negotiations, create high hopes for Somaliland's future.

The peaceful transfer of power after the November 2024 elections was hailed as a democratic milestone, but any delay in timely elections of municipal and parliamentary

representatives scheduled for May 2026 risks normalising the continual practice of extending terms without election.

### **3.3.2 Economic and Social Outlook**

Economic diversification efforts have progressed slowly, with development aid funds reduced, thereby limiting the flow of hard currency into the country. As a result, the economy remains heavily reliant on a narrow range of sectors, increasing vulnerability to climate shocks and market fluctuations. High expectations from the new government persist among the young population, particularly regarding promised reforms and restoration of power and resource sharing. However, youth unemployment remains persistently high, contributing to widespread frustration and a growing sense of disillusionment among the younger population.

## **3.4 SOMALIA: ONE STEP FORWARD, TWO STEPS BACK**

### **3.4.1 Political Transition and Federal Challenges**

Somalia is moving towards political uncertainty. Its political landscape remains deeply fragmented, despite the current government's unilateral attempt to transition to direct elections by [May 2026](#). The government is pushing for "one-person, one-vote" federal elections, but this process is fraught with security threats from al-Shabaab and political disagreements between the federal government and regional states, raising the risk of significant turmoil.

The federal government faces persistent resistance from regional states, particularly Puntland and Jubaland, over constitutional amendments and power-sharing arrangements.

### **3.4.2 Security Transition and Counter-Terrorism**

The planned transition from African Union Transition Mission in Somalia (ATMIS) to the Somali-led African Union Support and Stabilization Mission in Somalia (AUSSOM) represents only a symbolic milestone in Somalia's security ownership. However, the [Somali National Army](#) continues to struggle with sustaining territorial control in key regions like Galmudug and Hirshabelle.

Al-Shabaab remains a potent threat, exploiting political divisions to launch sophisticated attacks, as demonstrated by the October 2025 assault on Turkish-trained police units in Mogadishu. AUSSOM also faces severe funding challenges and the deployment of the Egyptian [contingent](#) has added another layer of complexity by putting neighbouring Ethiopia on high alert.

### **3.4.3 Prognosis**

[Somalia's trajectory in 2026](#) hinges on balancing security transition with a political solution to the upcoming elections. The base case suggests uneven stabilization with persistent urban terrorism risks, while success will depend on improved federal-state cooperation and sustained international support.

## **3.5 SOUTH SUDAN: THE FAILING STATE**

### **3.5.1 Political Stalemate and Electoral Delays**

South Sudan's political transition remains dangerously stalled, with the implementation of the Revitalized Peace Agreement facing repeated delays and setbacks. The country missed its December 2024 election deadline, and while elections are now tentatively set for late 2025 or early 2026, the extension of the transitional government's mandate reflects deep-seated political mistrust and institutional weaknesses.

Key constitutional benchmarks, including the establishment of a permanent constitution and electoral institutions, remain largely unmet.

### **3.5.2 Security and Humanitarian Crises**

The country stands on the brink of renewed widespread violence, with the [UN Commission on Human Rights](#) warning of potential regression to full-scale civil war. Detention and prosecution of peace partners, including First Vice President, Dr. Riek Machar, has brought the 2018 Agreement to the cusp of collapse.

Continued unilateral decisions made by the President are further eroding the agreement as well as the trust among the signatories coupled with an increasing number of armed resistance factions and politicized inter-communal disputes, the young nation is being pushed towards yet another civil war. The influx of over one million refugees from Sudan since April 2023 has further strained the country's limited resources and fragile social fabric.

The [deployment of Ugandan forces to South Sudan](#) has further compounded the challenges to peacebuilding efforts and given the crisis a regional dimension.

### **3.5.3 Economic Collapse and Resource Management**

[South Sudan's oil-dependent economy](#) suffered a severe contraction following the shutdown of its primary pipeline through Sudan. [While partial resumption](#) occurred in mid-2025, revenue flows remain unstable and insufficient to address the country's massive humanitarian needs.

The government's exploration of [alternative trade routes through Djibouti](#) and continued Emirati investment in the oil sector offer limited economic prospects amid pervasive corruption. The outlook for [South Sudan in 2026 is overwhelmingly pessimistic](#), characterized by political stagnation and humanitarian suffering. The most likely scenario involves continued and progressive collapse rather than dramatic state failure, with the political elite maintaining a fragile equilibrium that prioritizes personal enrichment and struggle for power over public welfare.

## **3.6 UGANDA: THE ANXIOUS ANCHOR**

### **3.6.1 Political Transition and Electoral Preparations**

Uganda approaches the January 2026 general elections amid rising political tensions and youth-led activism for peaceful and free electoral processes. President Yoweri Museveni, 81, who has ruled for nearly [40 years since 1986](#), has been confirmed as the governing party's candidate. His continued candidacy follows constitutional amendments that removed both term and presidential age limits, cementing a trend of extended rule. While major constitutional changes remain absent from the political agenda, concerns persist about media access and the fairness of the electoral environment.

President Museveni's continued political dominance appears assured as key challengers have deferred their bids, though public discontent over economic conditions represents a potential vulnerability. Bobi Wine (Robert Kyagulanyi Ssentamu), a pop star-turned-politician, is the most visible challenger to President Museveni and is actively campaigning for the January 2026 general election. He alleges the 2021 result was rigged and remains a significant force, particularly among younger voters.

### **3.6.2 Regional Security Engagement**

Uganda maintains significant regional security commitments, including troop contributions to counter-terrorism operations against Allied Democratic Forces (ADF) militants in the Democratic Republic of Congo and participation in the African Union Transition Mission

in Somalia (ATMIS). [The country's absence](#) from key regional peace initiatives, notably the Paris conference on the DRC conflict, has raised questions about its evolving diplomatic priorities.

The deployment of its troops to South Sudan contradicts its role as a guarantor of the 2018 Peace Agreement and has undermined peace implementation.

### 3.6.3 Economic Resilience and Challenges

Uganda's economy demonstrates relative resilience, with projected [growth](#) of 6.0-6.5% in FY2025/26, driven by infrastructure investments and anticipated oil production. However, high public debt, persistent unemployment, and a severe cost-of-living crisis continue to fuel public discontent and occasional protests.

[Uganda's outlook for 2026](#) suggests maintained political continuity amid growing social and economic pressures. The country will likely continue to play a regional security anchor role, although this position becomes increasingly costly and complicated by neighborhood instability.

## 3.7 KENYA: THE REGIONAL HUB UNDER PRESSURE

### 3.7.1 Political Transition and Opposition Dynamics

Kenya faces significant political uncertainty following the death of veteran opposition leader Raila Odinga in October 2025. The resulting "power vacuum" within the opposition movement has created fluid political dynamics ahead of the 2027 general elections. The stampede fatalities during Odinga's funeral and subsequent police responses have highlighted the volatility of Kenya's political environment and raised concerns about electoral violence.

Raila Odinga's death on October 15, 2025, [marks the end of a 30-year era and opens a new opportunity for realignment in Kenya](#): As a giant in Kenyan politics, it seems his political base will continue to support the "broad-based" cooperation Raila Odinga established with President William Ruto for the 2027 elections.

### 3.7.2 Economic Challenges and Social Unrest

As East Africa's economic hub, Kenya continues to grapple with substantial challenges including [high public debt](#), currency instability, and persistent cost-of-living pressures.

The '[Occupy Parliament](#)' protests which began in June 2024 and continued sporadically into 2025 demonstrated significant public discontent with economic policies, particularly regarding the Finance Bill 2024/2025. Despite these challenges, Kenya maintains one of the lowest extreme poverty rates in the region and continues to benefit from its strategic positioning as a trade and logistics centre; however, Nairobi's mediation role in regional crises has been complicated by diplomatic frictions around the Sudan peace track, where Kenya is perceived to have backed the RSF.

### 3.7.3 Security and Regional Role

Kenya faces ongoing security threats from Al-Shabaab along its Somali border and deals with inter-communal conflicts in its northern regions. The country's involvement in regional infrastructure projects, including the [new expressway](#) with Uganda, underscores its continued commitment to regional integration despite domestic challenges.

Kenya's path through 2026 will be dominated by "political realignments" and economic pressures. The base case suggests managed stability with recurring protests, though the country remains vulnerable to escalation of political tensions as the 2027 elections approach.

## 3.8 DJIBOUTI: THE GEOSTRATEGIC KEYSTONE

### 3.8.1 Political Stability and Strategic Positioning

Djibouti maintains its position as an oasis of political stability in a volatile region, with the ruling party preparing for elections in April 2026. A [constitutional amendment](#) removing the presidential age limit of 75 has been proposed, a move widely seen as clearing the path for the 77-year-old incumbent, Ismail Omar Guelleh, to seek an unprecedented sixth term.

The country's strategic importance continues to grow, hosting multiple foreign military bases (US, China, France, Japan among others) and serving as a critical nexus for great power competition in the Middle East, Horn of Africa, Red Sea, Gulf of Aden and Western Indian Ocean entry.

### 3.8.2 Economic Model and Infrastructure Development

Djibouti's economy remains heavily reliant on [port logistics](#) services to Ethiopia and revenues from foreign military presence. Recent developments, including South Sudan's purchase of land for port access, underscore Djibouti's crucial role as a logistics hub for landlocked neighbours. However, high public debt---primarily from China---and the need for economic diversification beyond port services represent significant long-term challenges.

### 3.8.3 Regional Diplomacy and Mediation

Djibouti has increasingly positioned itself as a potential mediator in regional disputes, leveraging its relative stability and strategic relationships. The country plays a vital role in international efforts to safeguard Red Sea shipping lanes from piracy and other threats, though Houthi attacks have disrupted shipping throughout and threatened the ports-logistics model.

[Djibouti's outlook for 2026](#) suggests continued strategic importance amid economic constraints. The country will likely maintain its "balancing act" between competing international powers while seeking to capitalize on its geographic position to mitigate [economic](#) vulnerabilities.

## 3.9 ERITREA: DIPLOMATIC POSTURE AND RED SEA SECURITY

Despite its insularity, Eritrea has engaged assertively in Red Sea diplomacy. President Afwerki's October 2025 visit to Egypt signalled a tightening alignment with Cairo around shared concerns over Ethiopian policy and maritime security. This emerging axis reinforces regional polarization around Ethiopia's push for sea access. The country's reported support to groups opposed to the Ethiopian Federal Government, particularly TPLF and other armed wings such as Fano militias, may lead to a full-scale war with unprecedented humanitarian impact and possible reconfiguration and border disputes.

### 3.9.1 Eritrea's Political Continuity and 2026 Outlook

Regarding age factors, President [Isaias Afwerki](#) is nearing 80 years old, and his age is a subject of discussion regarding the country's future and "potential succession". Despite his age, recent reports from the Eritrean state media show him actively engaged in high-level diplomatic meetings (considering his recent 5-day visit to Egypt), giving interviews, and delivering keynote addresses as recently as November 2025.

The state's militarized political economy and the persistence of open-ended national service (which made many eligible young men flee the country) have entrenched a "governing model" where loyalty and coercion outweigh formal institutions, leaving

no transparent succession plan and making leadership transition the system's core vulnerability. For 2026, the base case is "managed stasis" under Isaias: continued securitized governance, constrained rights, and modest, project-dependent growth.

An elite-led continuity arrangement if health or succession pressures "force" a transition, or a disorderly handover marked by security-elite fragmentation and border frictions with Ethiopia, are also potential outcomes for the country. Practical indicators to watch include "unusual reshuffles" among senior commanders, concrete and verifiable changes to national service terms, and shifts in official rhetoric or engagement with international mechanisms. **Bottom line:** continued power consolidation; expect continuity unless a sudden succession shock compels recalibration.

## 4. Conclusions

### 4.1 The Regional Balance Sheet

The Horn of Africa enters 2026 amidst profound contradictions---simultaneously demonstrating remarkable resilience while facing exponential threats to its stability. The convergence of political fragmentation, security challenges, and environmental crises has created the potential for a perfect storm that tests the limits of state capacity and international response mechanisms.

A defining feature of the political landscape is the concerted effort by long-serving leaders to extend their tenure through constitutional manipulation, casting a shadow over the credibility of upcoming elections in Uganda, Djibouti, Ethiopia, and Somalia. While individual countries face distinct challenges, the interconnected nature of these crises means that developments in one nation inevitably ripple across borders, creating a regional ecosystem of instability.

### 4.2 The Interconnected Crisis Matrix

Three overlapping crisis domains define the region's trajectory: the political-strategic dimension exemplified by Ethiopia-Eritrea tensions, Sudan's collapse and the unfolding political and security crisis in South Sudan; the security-territorial dimension visible in Somalia's fragmentation; and the humanitarian-environmental dimension affecting all countries through climate shocks and displacement.

To this matrix, we must add the dimension of political entrenchment, where leaders' focus on "regime survival" through electoral manipulation and constitutional changes directly undermines conflict resolution and good governance. This matrix of crises creates feedback loops where political failures exacerbate security challenges, which in turn deepen humanitarian needs, creating a vicious cycle that becomes increasingly difficult to break.

### 4.3 The Leadership Deficit

Across the region, a concerning leadership deficit undermines conflict resolution efforts. Political elites increasingly prioritize short-term regime survival over long-term national interests, as evidenced by the constitutional manoeuvres in Kampala and Djibouti, while regional institutions like IGAD and the African Union struggle to maintain relevance amid competing national agendas. The absence of trusted mediators and the proliferation of external actors with divergent interests further complicate diplomatic efforts.

#### 4.4 The Most Probable 2026 Projection

Based on the current trends and structural constraints, the most convincing prognosis for 2026 is managed deterioration, a scenario where “crises deepen” but full-scale regional war is avoided through last-minute diplomatic interventions and the sheer exhaustion of conflict parties. This path involves:

- Continued fighting in Sudan with periodic escalation
- Frozen but tense Ethiopia-Eritrea relations with a high probability of proxy or direct conflict breaking out between the two.
- Political stagnation in South Sudan and Somalia
- Economic hardship across the region
- Political uncertainty or continuity in Eritrea
- Growing humanitarian needs outpacing response capacity

#### 4.5 Critical Uncertainties and “Wild Cards”

Several wild cards could dramatically alter the region’s trajectory. For instance, unexpected leadership changes in key countries could reset agendas overnight, opening windows to fast-track reforms or, conversely, stalling ongoing initiatives. Secondly, major climate events may overwhelm response systems, exposing structural weaknesses but also creating policy space to institutionalize resilience standards and surge financing. Thirdly, significant external power intervention could reshape priorities and financing flows, presenting opportunities for technology transfer and long-horizon investment alongside risks to local ownership. Fourthly, an economic collapse in any major regional economy would reverberate across borders, tightening fiscal space but potentially catalyzing reforms that prioritize high-value, cost-effective peace and security measures. Conversely, successful peace breakthroughs—especially those defying current predictions—could unlock cross-border cooperation, enable shared surveillance and early warning, and accelerate restoration projects that deliver stability and peace dividends.

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