Global Peace Index 2026: Special Supplement

Global Conflict Systems

Conflicts Spread

The Connection Between the Horn of Africa and the Greater Middle East

Emerging Clusters

IEP Institute for Economics & Peace

Quantifying Peace and its Benefits

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Key Findings

- **The Horn of Africa and the Greater Middle East conflict clusters risk merging. If this were to occur, it would be catastrophic for the global economy, causing more countries to be drawn into the conflict.**
- **The Horn of Africa and the Greater Middle East are currently strongly interconnected. The connections run through Gulf sponsorship, Red Sea geography, gold flows from Sudan to the United Arab Emirates (UAE), and the wars in Yemen and Sudan.**
- **A group of states function as bridging actors across both systems: UAE, Saudi Arabia, Egypt, Türkiye, and Israel. Each is structurally embedded in both regions at once, concerned with issues of Nile security, regional influence, Red Sea access, and the containment of Iran.**
- **Almost every country in an active conflict today belongs to one of eight regional clusters. Each cluster is held together by shared external sponsors, refugee flows, illicit economies, ethnic networks, or trafficking routes.**
- **The eight systems are the Horn of Africa, the Sahel and Lake Chad basin, the Greater Middle East, the Great Lakes and Central Africa, Eastern Europe, Afghanistan and Pakistan, Mainland Southeast Asia, and the Andean corridor.**
- **Geopolitical fragmentation has risen across financial, mobility, political, and trade dimensions over the past 15 years, reversing decades of integration. Vetoes have risen, and UN Security Council resolutions have declined, leaving the principal body for coordinating international responses increasingly gridlocked.**
- **The 2025–26 Iran war is the largest interlocking event in years. It transmits local conflict dynamics to the global economy by disrupting Red Sea shipping and pushing food and fuel prices higher in import-dependent states.**
- **The Horn and the Greater Middle East are becoming increasingly interlocked, but they remain two separate conflict systems. If the Horn sponsors became aligned, then the two systems could merge into one conflict system, further stressing the international economic system.**
- **The conflict actor alliance most likely to initiate a merging of the two conflict systems is the emerging UAE–Israel–Ethiopia axis, set against a Saudi–Egypt–Türkiye reaction.**
- **Another convergence factor is the conversion of the Red Sea from a shared corridor into a single contested space, in which the Houthi threat, Gulf port competition, and the militarisation of Bab al-Mandab and the Suez approach are all managed as one military theatre.**

Executive Summary

The major finding of this report is the potential merging of the two conflict clusters located in the Greater Middle East and the Horn of Africa. These are two of the largest conflict clusters globally. If this were to happen, then the world would move into a dangerous situation, where the combined conflict system would likely spread to more countries, causing unparalleled economic hardship that might take decades to unwind.

Countries adjacent to the conflict would be further destabilised through multiple mechanisms described in this report, including refugee flows, weakened state capacity, and the flow of arms and fighters feeding domestic grievances. Underpinning this would be a deteriorating global economy impacting at-risk countries through debt financing, poorer agricultural yields, lack of hard currencies to fund energy imports, and growing populations of disaffected youth.

A broadening conflict could easily expand into surrounding countries: outwards from the Horn of Africa into Kenya and further into the Great Lakes region, and from the Greater Middle East cluster into Azerbaijan and Egypt.

Without concerted diplomatic efforts to unwind these conflict clusters and stop them from merging, the likely outcome is further expansion and entanglement. Some of the key diplomatic initiatives could be:

- **A Red Sea regional dialogue forum.** No existing body spans both shores of the Red Sea, the point where the two conflict systems meet. A standing forum of Horn of Africa and Gulf states would fill that gap.
- **Humanitarian corridors and local ceasefires.** Agreements that let aid, trade, and civilians move safely can lay the groundwork for broader political settlements and help build trust between warring parties.
- **Coordination among external backers.** Proxy support from Iran, Türkiye, Israel, and Gulf powers such as the UAE and Saudi Arabia is the main channel through which the two clusters are becoming entangled. Bringing these states into a de-escalation dialogue and working towards an agreement would cut the strongest link.
- **Tighter arms embargo enforcement.** Combined UN, African Union, and Arab League monitoring would slow the cross-border flow of weapons and fighters that connects one conflict to the next.
- **Debt relief and economic stabilisation for at-risk states.** Debt restructuring plus food and energy financing for countries such as Kenya, Egypt, and Pakistan would ease the economic pressures that turn fragile neighbours into the next theatre of conflict.

There are eight conflict clusters described in this report; three are in sub-Saharan Africa and border each other – the Horn of Africa, the Great Lakes region, and the Sahel and Lake Chad. Two other conflict clusters also share a common border: the Greater Middle East cluster and the Afghanistan-Pakistan conflict cluster.

There are nine mechanisms described in this report that cause conflicts to spread; all nine are present in the Horn of Africa.

The two conflict clusters are currently strongly interlinked through Gulf sponsorship operating within both systems, the Red Sea chokepoints of Bab al-Mandab, Hormuz, and the Suez approach, the gold corridor running from Sudan to the United Arab Emirates, and the bridging roles of Egypt, Türkiye, and Israel.

Two developments would convert this coupling into a merger. The first is sponsor consolidation, in which an emerging UAE–Israel–Ethiopia axis, set against a Saudi–Egypt–Türkiye reaction, fuses the two theatres and links the clusters at their cores rather than their edges.

The second is the conversion of the Red Sea from a shared corridor into a single contested space, in which Houthi attacks and denial of access to Bab al-Mandab, Gulf port competition, and the militarisation of Bab al-Mandab and the Suez approach are managed as one theatre stretching from Hormuz to Bab al-Mandab. A single shock, such as a new war pitting Eritrea and allied Ethiopian armed groups against the Ethiopian state alongside open conflict spanning Darfur to the Red Sea, could trigger both at once.

The window for preventing a merger is narrowing but has not closed. The connections between the two clusters currently run through shared sponsors, trade corridors, and maritime chokepoints rather than through direct alliances between armed groups on the ground. This matters because relationships of convenience can still be unwound through negotiation, whereas fused command structures, shared recruitment pools, and integrated war economies are far harder to separate.

The history of the region's conflicts shows that once armed groups begin operating across theatres, outside powers lose much of their leverage and local ceasefires stop holding. Diplomatic engagement in the next few years will therefore be worth far more than larger interventions made after the systems have merged.

The cost of inaction would extend well beyond the region. The Red Sea carries a substantial share of global trade, and disruption to it is already raising shipping costs, insurance premiums, and delivery times worldwide. A merged conflict system would put further pressure on global food and energy prices, worsen inflation, and further stymie global economic growth, while deepening humanitarian need at a time when aid budgets are shrinking and generating refugee flows reaching well beyond neighbouring states.

Set against these costs, the diplomatic initiatives outlined in this report are inexpensive. They do not require new institutions to be built from scratch, large troop deployments, or major financial commitments. What they require is sustained political attention from the major powers and regional players before the two systems become one.

Introduction

Modern wars are rarely self-contained. The number of state-based armed conflicts is now at its highest level since the end of the Second World War, with 61 active conflicts in 2024, almost double the figure from 15 years earlier. The rise has been driven almost entirely by external countries becoming involved in internal conflicts in another state, which have grown by more than 175 per cent since 2010. Conflict-related deaths have risen by more than 530 per cent since 2008, and the number of countries involved in at least one external conflict in the previous five years has climbed from 59 in 2003 to 103 in 2024.[1]

These conflicts do not spill across borders automatically. They spread through specific, identifiable mechanisms: refugee flows, the movement of arms and fighters, illicit economies, rebel sanctuaries, ethnic kin across borders, external state sponsorship, transnational ideological networks, demonstration effects, and the weakness of neighbouring states. When several of these operate together across a connected region, the result is a conflict system: a cluster of wars that share sponsors, supply chains, fighters, and refugees densely enough that they cannot be analysed in isolation.[2]

This report examines conflict systems in three ways:

- It first identifies eight regional systems in which active wars are bound together by shared sponsors, refugee flows, illicit economies, and armed-group networks.
- It then examines how two of those systems, the Horn and the Greater Middle East, are coupling more tightly, and what would have to change for the coupling to harden into a single contiguous conflict.
- Finally, it examines the structural drivers that explain why so many clusters are intensifying at once.

The clusters are not local problems that happen to coincide. They are the regional signature of a global shift from a unipolar, American-policed order toward a fragmented, multipolar one in which influence is more widely distributed and harder to coordinate.

How Conflicts Spread

Nine mechanisms drive the spread of conflict across borders. They fall into three categories.

- Material channels – refugee and displacement flows, arms and combatant circulation, illicit economies, and rebel sanctuaries, which move people, weapons, money, and fighters across borders.
- Relational channels – transborder ethnic kin, external state sponsorship, and transnational ideological networks, which link armed actors, ethnic groups, and states through ties that pre-exist any specific conflict.
- Conditioning factors – state capacity and demonstration effects determine how vulnerable a given environment is when the other mechanisms act on it.[2] A

demonstration effect means that successful tactics used elsewhere are copied and adapted.

Early studies of how conflicts spread treated geographic clustering as evidence of automatic spillover, often comparing the spread of conflict to a medical infection. That framing no longer holds. The spread of conflict is neither inevitable nor driven by a single cause. It results from identifiable mechanisms shaped by the strategic choices of states, armed groups, displaced populations, and ideological networks, and by how permissive the surrounding environment is.[3]

A conflict system is a cluster of countries whose conflicts are bound together because several of these mechanisms are operating across them at once. Inside a system, wars share sponsors, refugees, armed groups, trafficking routes, or ethnic networks. The clustering is dense enough that the wars cannot be analysed in isolation.[4]

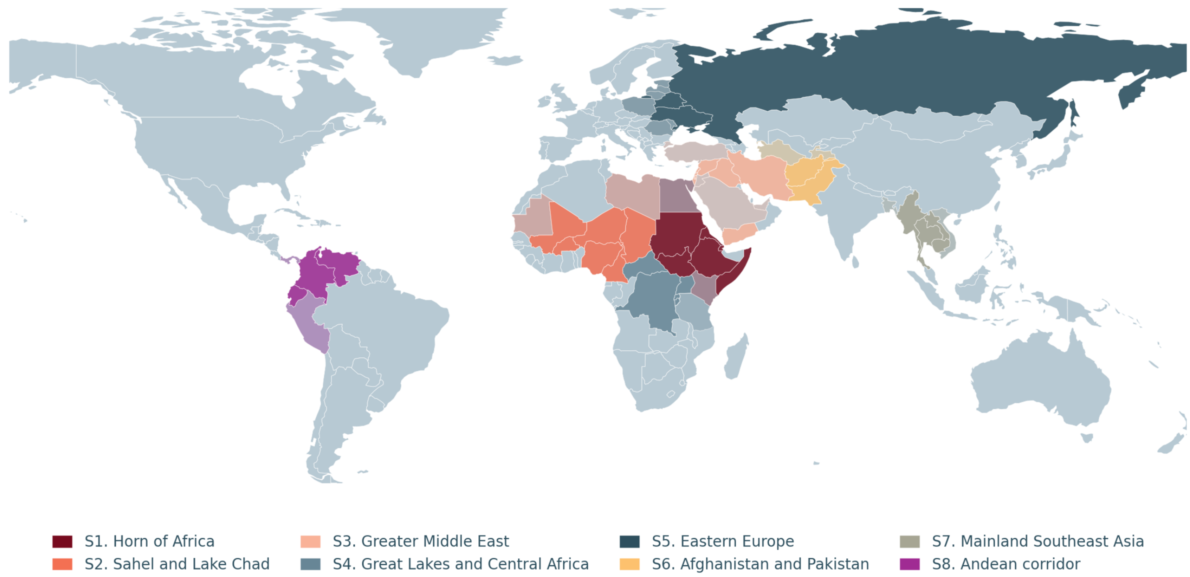
The relative weight of the nine mechanisms varies by system. Physical spillover is concentrated among neighbouring countries. Informational and ideological channels can operate globally. Refugee and arms flows generate rapid spillover during active fighting. The post-conflict diffusion of surplus weapons and demobilised fighters can raise regional risk for years after a conflict ends. The eight systems described in this report are defined by the combinations of mechanisms that have settled into stable patterns over the past decade.

The Eight Conflict Systems

Almost every country in an active war today belongs to one of eight conflict clusters. Figure S1 maps the systems and their cores and peripheries.

FIGURE S1

The world's eight conflict systems, 2026



Source: IEP analysis, country boundaries: Natural Earth.

The eight systems differ in the mechanisms that bind them. Some are organised primarily around external sponsorship, such as Eastern Europe and the Greater Middle East. Others are held together by illicit economies, including the Andean corridor and Mainland Southeast Asia.

Others run on ethnic and refugee networks, most noticeably the Sahel and the Great Lakes. Every cluster shows at least three of the nine mechanisms operating concurrently.

S1. Horn of Africa

Sudan's civil war, Ethiopia's overlapping insurgencies in Tigray, Amhara, and Oromia, the unresolved rivalry between Ethiopia and Eritrea, the chronic fragility of Somalia, and South Sudan's relapse into war. The system is held together by Gulf sponsorship. The UAE backs the Rapid Support Forces, Egypt and Saudi Arabia broadly support the Sudanese Armed Forces. There is a gold-smuggling network running from Darfur through Chad, the Central African Republic, Libya, and Uganda to Dubai. Every one of the nine mechanisms is operating in the Horn at the same time.

S2. Sahel and Lake Chad

Mali, Burkina Faso, Niger, Nigeria, Cameroon, and Chad are connected through al-Qaeda-affiliated Jama'at Nusrat al-Islam wa al-Muslimin (JNIM) and Islamic State franchises, Tuareg and Fulani ethnic networks that span all six countries, and the post-Libya arms surplus that triggered the 2012 Mali crisis. The insurgency that began in northern Mali in 2012 progressively expanded into central Mali, then Burkina Faso and Niger, exploiting the same ungoverned spaces, weak borders, and regional arms markets. The system illustrates how arms circulation, transborder ethnic kin, and weak state capacity compound one another.[5]

S3. Greater Middle East

Israel and Gaza, Lebanon, Syria, Iraq, Yemen, and Iran. The system is organised around Iran's axis of resistance – Hezbollah, the Houthis, and Iraqi militias – on one side, and a Saudi–UAE–Egyptian counter-coalition on the other. The 2011–24 Syrian civil war was the defining event of the system in the past 15 years, drawing in Iran, Russia, Hezbollah, Saudi Arabia, Qatar, Türkiye, and the United States. The 2025–26 US and Israeli campaign against Iran has reset the internal balance and brought conflict to Gulf states that had avoided direct impacts in the prior decades.[6]

S4. Great Lakes and Central Africa

The Democratic Republic of the Congo, Rwanda, Uganda, Burundi, and the Central African Republic. The current focal point is the M23 rebellion, but the system's structure dates to the post-1994 Rwandan genocide and the refugee circulation that triggered the First and Second Congo Wars. Mineral trafficking of coltan, cassiterite, wolframite, and gold flows through Rwanda, Uganda, and Burundi into global supply chains, giving armed groups financing that does not depend on external sponsors. Actors whose territorial control follows trafficking routes, rather than ethnic or political boundaries, are common. Because their financing comes from controlling the flow of resources rather than from holding a homeland or representing a constituency, these groups splinter, re-form, and switch allegiance as the value of particular routes shifts.[7]

S5. Eastern Europe

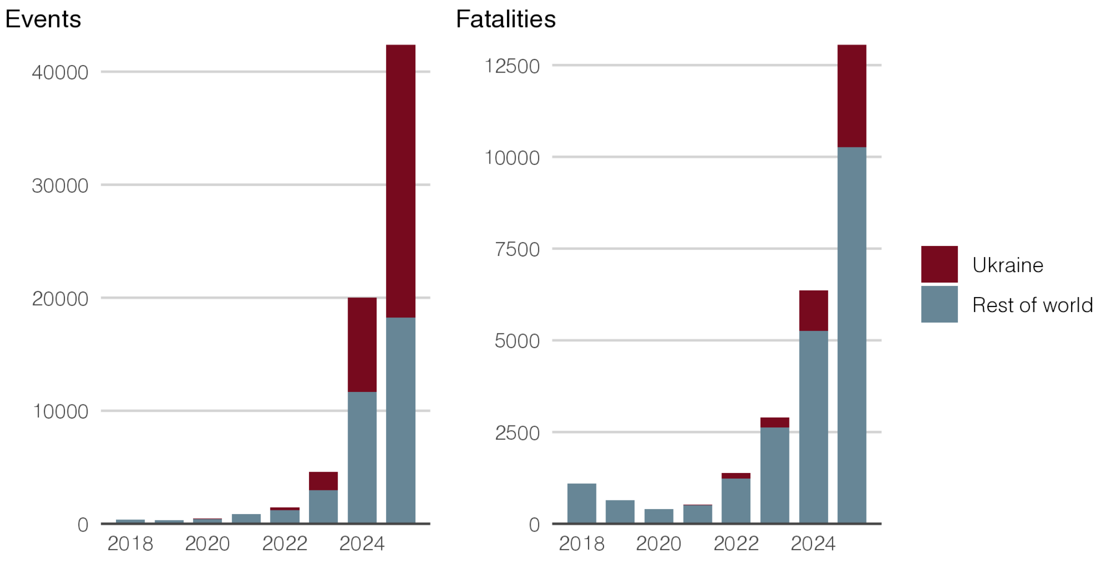
Russia, Ukraine, and Belarus, with supplier blocs on either side. NATO states arm Ukraine, while North Korea, reportedly Iran, and China-linked suppliers support the Russian side.

Eastern Europe is the most internally coherent of the eight systems, a single high-intensity interstate war with clear and declared sponsors. It also exemplifies the technological transformation reshaping all modern conflict. Ukraine is on track to produce more than a million drones per year. In March 2026, Russia recorded 38,000 casualties, with Ukrainian sources claiming that almost all were caused by drone attacks. Figure S2 shows the scale of drone attacks and fatalities tied to Ukraine relative to the rest of the world.[8]

FIGURE S2

Drone attacks and fatalities, Ukraine and rest of world, 2018–2025

The war in Ukraine accounts for roughly half of recorded conflict events globally since 2022, and a quarter of all fatalities in 2025.



Source: ACLED, IEP calculations

S6. Afghanistan and Pakistan

The Tehrik-i-Taliban Pakistan (TTP) insurgency, Baloch and Pashtun cross-border kinship networks, and the Afghan–Iranian border zone. The collapse of Afghan opium production after the Taliban's 2022 cultivation ban resulted in opiate production falling by 95 per cent and the opiate economy falling from US$2 billion in 2020 to US$0.4 billion in 2024. This has removed a major financing channel without ending the underlying conflict architecture. Pakistan's low-level war with Afghanistan and ongoing tensions with India suggest that this cluster, while currently attracting less attention, is a major factor in global conflict risk.[9]

S7. Mainland Southeast Asia

Myanmar's civil war and the methamphetamine economy that funds both the ethnic armed organisations and the junta. The value of Myanmar's illicit drug economy rose 250 per cent between 2020 and 2024, from US$10 billion to US$35 billion. Ethnic armed organisations including the United Wa State Army and the Shan State Army derive substantial revenue from production and trafficking, with cross-border operational links into Thailand, Laos, China, and India. Rohingya displacement has externalised the conflict's humanitarian footprint to Bangladesh. Sporadic armed conflict between Thailand and Cambodia in 2024–25 threatens the relative peace that the rest of the region has enjoyed in recent years. That conflict involves the policing of illicit economies, including the global scam centres that have sprung up along the Cambodian border.[10]

S8. Andean corridor

Colombia, Venezuela, and Ecuador. It is the one system on the list driven primarily by an illicit market rather than a sponsor or kinship network. After the 2016 peace agreement with the Revolutionary Armed Forces of Colombia, dissident factions that rejected demobilisation expanded into Venezuela, exploiting the collapse of Venezuelan state capacity to set up cocaine production and trafficking that now sustain an armed presence on both sides of the border. Colombia's cocaine economy grew 70 per cent, from US$5 billion in 2020 to US$8.5 billion in 2024, reflecting record coca cultivation of 253,000 hectares in 2023 and a 53 per cent surge in cocaine production. Recent political turbulence in Venezuela, following the US raid to detain former president Nicolás Maduro, leaves the country in an uncertain state likely to be further exploited by armed actors, who are also turning to gold and critical-minerals mining.[11]

The Connection between the Horn of Africa and the Greater Middle East

The Horn of Africa and the Greater Middle East are two distinct conflict systems, but they are becoming increasingly interconnected. The coupling runs through three structural ties:

- Gulf sponsorship operates simultaneously in both regions.
- The Red Sea, whose chokepoints of Bab al-Mandab, the Strait of Hormuz, and the Suez approach are economic lifelines for both.
- The gold corridor that runs from Sudan through several African states to the UAE.

Three further bridging states – Egypt, Türkiye, and Israel – operate as central nodes in both systems at once.

The Horn as a regional conflict complex

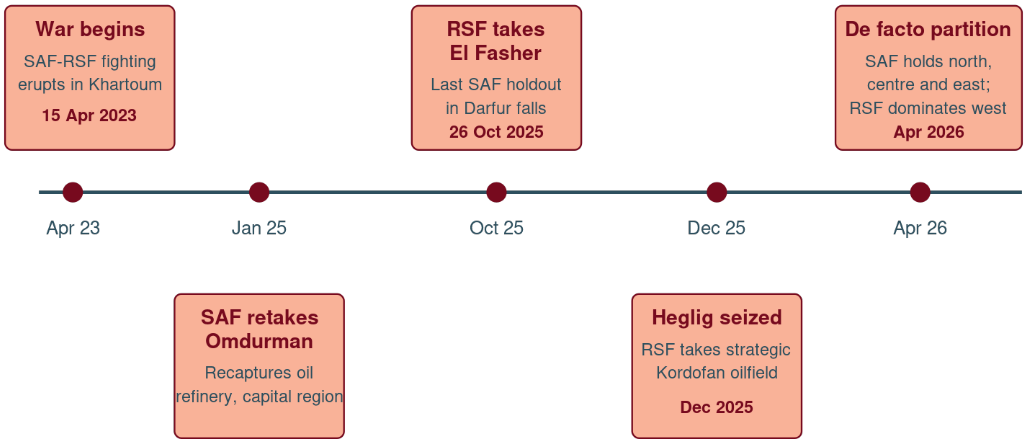
The Horn of Africa, comprising Sudan, Ethiopia, Eritrea, Somalia, Djibouti, and South Sudan, is the clearest contemporary example of all nine mechanisms operating at the same time within a single regional system. At the centre is the war between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF), which began on 15 April 2023 and has become the world's largest humanitarian crisis, with over 12 million people displaced,[12] and credible estimates of up to 400,000 dead.[13]

Figure S3 sets out the headline events of the war from outbreak in April 2023 to the de facto partition that had settled in by early 2026. The conflict's centre of gravity has shifted from the capital region to Darfur and now to Kordofan, hardening a territorial split that no negotiated settlement currently in prospect would reverse.

FIGURE S3

Sudan war: key events, April 2023 to April 2026

Territorial control has shifted from the capital region to Darfur, then to Kordofan, hardening a de facto partition.



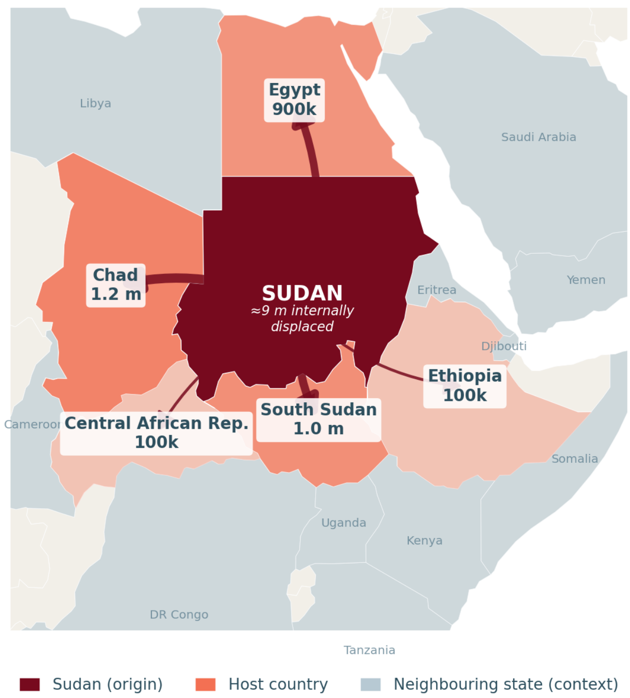
Source: ACLED, Council on Foreign Relations Global Conflict Tracker, UNHCR, OCHA

Figure S4 shows the cross-border distribution of those refugees. Chad alone hosts approximately 1.2 million, the single largest concentration. South Sudan hosts over a million more. Egypt hosts around 0.9 million registered refugees, mostly in urban areas. The Horn's adjacent states are absorbing the bulk of the humanitarian load while themselves running fragile or already overstretched systems.

FIGURE S4

Cross-border displacement from Sudan, April 2023 to early 2026

Chad and South Sudan together host over half of all Sudanese refugees, both as already-fragile states.



Source: UNHCR Sudan situation portal, IOM Displacement Tracking Matrix, OCHA. Numbers rounded.

External state sponsorship is the most active conflict spread mechanism. The UAE backs the RSF, Egypt and Iran back the SAF, and Türkiye, Qatar, and Russia have moved between sides.[14] The competitive sponsorship dynamic mirrors the Syrian model. It has intensified the conflict, fragmented peace processes, and created conditions under which neither party faces the resource constraints that might compel negotiation.

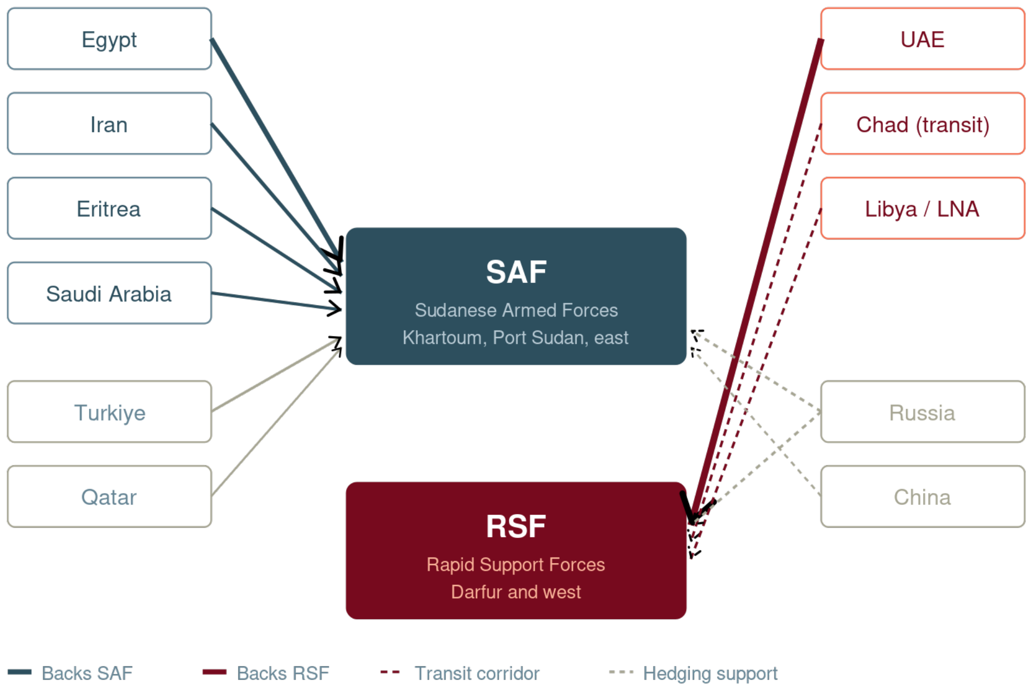
An illicit-economy structure built on gold financed through trading networks linked to the UAE makes the war exceptionally resistant to resolution. Some estimates suggest that at least 400 tonnes of gold were smuggled out of Sudan between 2012 and 2024, with the UAE as the primary destination. A confidential UN Panel of Experts report estimated that the RSF alone produced 10 tonnes of gold in 2024, with a market value of approximately US$860 million.[15]

Figure S5 maps out the structure of external sponsorship. The unusually high number of external sponsors makes the Sudan conflict unique even among contemporary proxy conflicts, with Gulf monarchies on opposite sides and several Eurasian powers hedging.

FIGURE S5

External sponsors of Sudan's belligerents

Arrow thickness reflects the relative scale of arms, financing, or direct military support to each side.



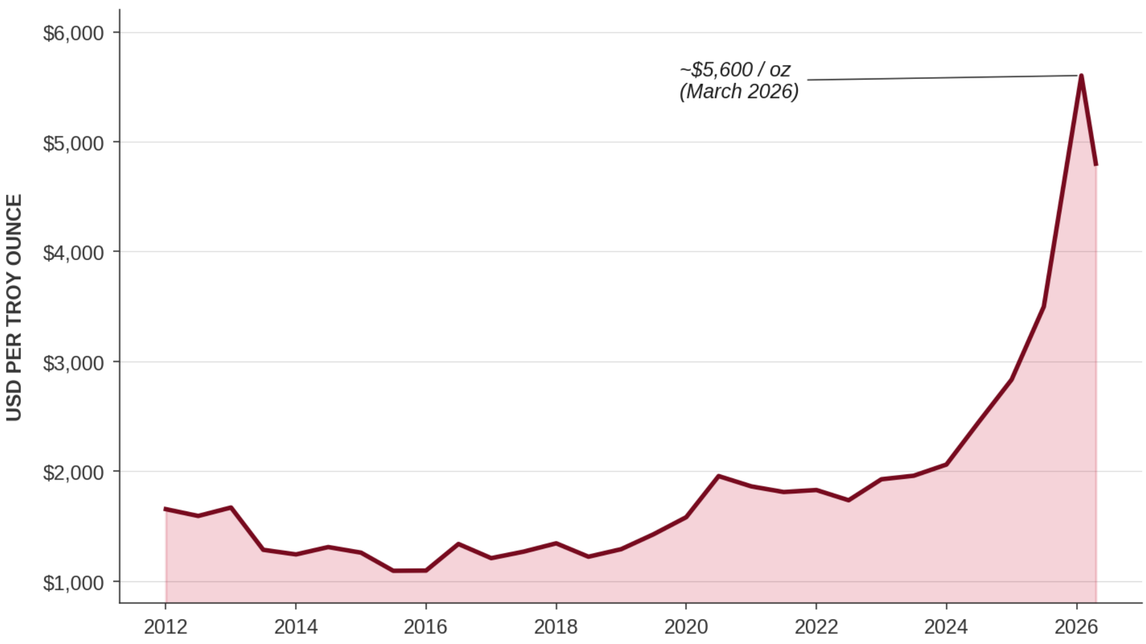
Source: UN Panel of Experts on the Sudan, S/2024/65, XCEPT Research, Wilson Center, Le Monde, March 2026.

Gold plays a significant role in exacerbating the conflict. When the conflict started, the gold price sat at around US$2,000 per ounce. Since 2024, the price has risen approximately 150 per cent, briefly breaking US$5,000 per ounce in March 2026. The implications of prices at current levels are unknown, but the shock is likely to raise revenue available for arms and fighters and to create sharper incentives to control mining territory and transit routes. Other resources show the same pattern. Gum arabic, a key ingredient in global food production, arable land bought by Gulf states for food production, and oil pipelines are all contested.[16]

FIGURE S6

Monthly gold price, 2012–2026

The gold price has risen approximately 150 per cent in the past three years, raising the revenue available to armed groups that control gold mining and transit.



Source: LBMA Gold Price, World Gold Council, APMEX, Trading Economics

Conflict in Ethiopia is also strongly connected to the war in Sudan. Ethiopia is facing three overlapping insurgencies in Tigray, Amhara, and Oromia, and the Ethiopia–Eritrea axis ties Sudan's war to a wider set of Red Sea disputes over Somaliland, port access, and encirclement.

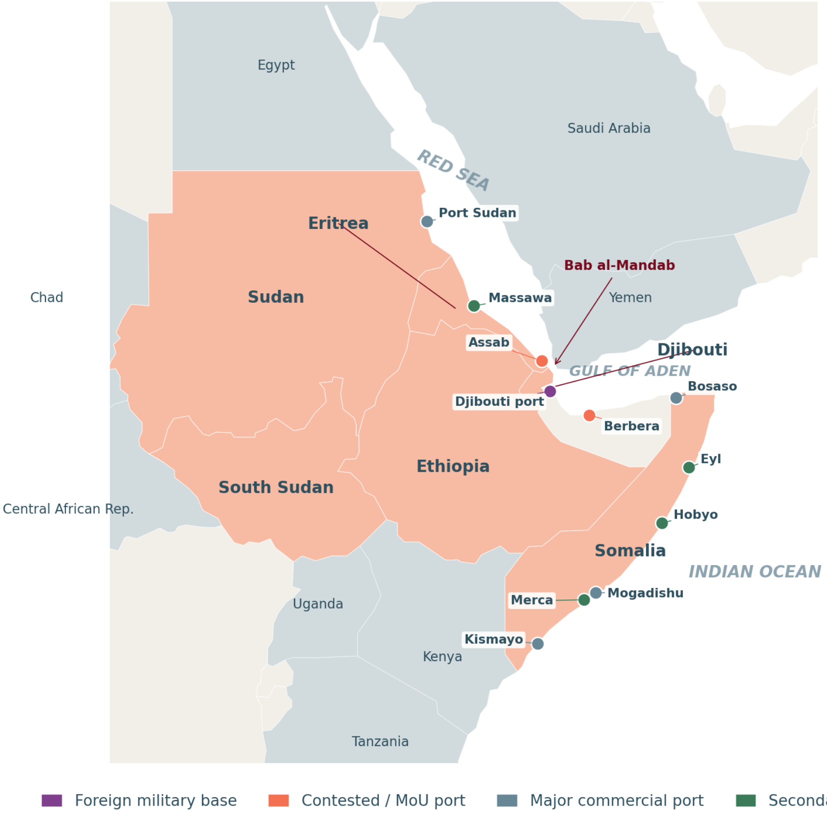
The Ethiopia–Eritrea axis is the most acute war risk in the region as of mid-2026. The 2018 peace deal between the two states has effectively collapsed: Eritrea has sided with the SAF in Sudan's war and joined an emerging coalition to encircle Ethiopia with Egypt and Somalia, while Ethiopia has responded by deepening ties with the UAE and signing a January 2024 memorandum of understanding with Somaliland for access to the port of Berbera.

Underlying all of this is the structural pressure Ethiopia faces from lack of access to the Red Sea, as shown in Figure S7. Ethiopia routes roughly 95 per cent of its international trade through Djibouti, paying between US$1.5 billion and US$2.8 billion a year in fees. Independent access to the Red Sea is therefore both an economic necessity and a nationalist cause.[17]

FIGURE S7

Port locations and sea access in the Horn of Africa

Foreign military bases and contested ports cluster along the Red Sea, the physical expression of the Horn's coupling with the Greater Middle East.



Source: International Crisis Group, ACLED, Carnegie Endowment, SIPRI, country boundaries: Natural Earth.

Box S1. Colombian contractors in Sudan: a long-range coupling mechanism

In May 2026 Human Rights Watch reported a further dimension of the UAE's sponsorship of the RSF: the recruitment and deployment of Colombian private military contractors to fight alongside the RSF in Darfur.

Since 2024, an Abu Dhabi-based security company licensed to work for the Emirati government and linked to the ruling family's Global Security Services Group is working through the Colombian recruiter A4SI, who appears to have hired the contractors. At least 300 had been deployed by August 2024. They transited through UAE military facilities at Ghiyathi and Al Wathba before travelling to Sudan via an air bridge running through eastern Libya, Bossaso in Puntland, and N'Djamena, the same multi-country logistics architecture that sustains the Horn's external-sponsorship and arms-circulation mechanisms.

The report places contractors at the siege and fall of El Fasher and documents the training of RSF recruits, including child soldiers, alongside Bulgarian-made munitions diverted from UAE stockpiles. The case shows how the coupling of conflict systems can stretch across continents. A surplus of demobilised combatants from one system, the Andean corridor, finds employment as paid fighters in another, the Horn, through the financial and logistical infrastructure of a Greater Middle East state.[18]

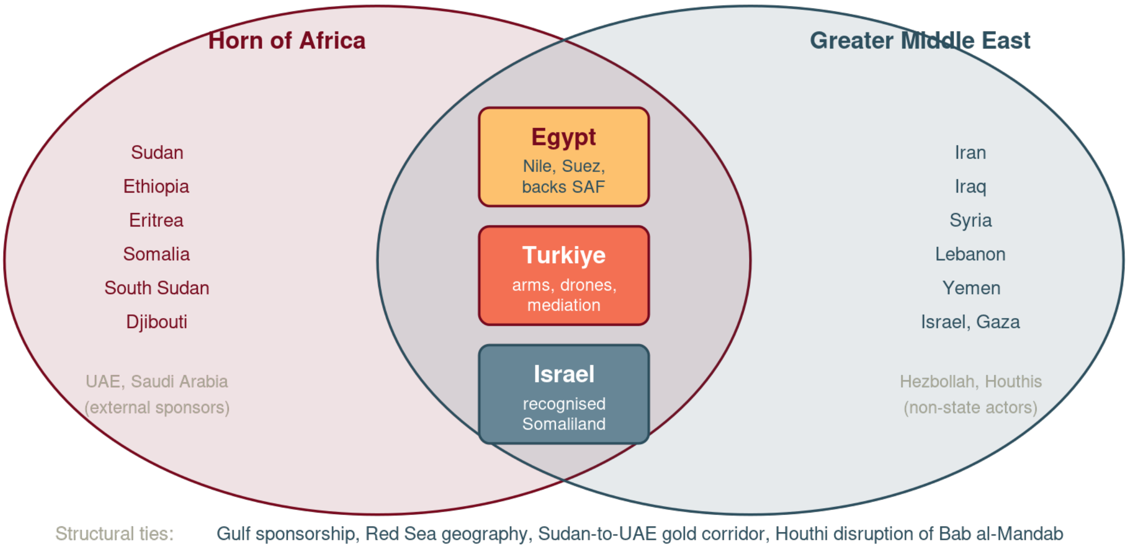
Bridging states: Egypt, Türkiye and Israel

The Gulf monarchies are the most visible link between the Horn and the Greater Middle East, but they are not the only connection. Three other states, Egypt, Türkiye, and Israel, function as bridging actors whose interventions augment conflict on both sides of the Red Sea at the same time. Each is a central node in the Greater Middle East system and, simultaneously, an active sponsor or strategic player in the Horn, as shown in Figure S8.

FIGURE S8

Bridging states between the Horn of Africa and the Greater Middle East

Egypt, Türkiye, and Israel are structurally embedded in both regions, pursuing objectives that span the two.



Source: IEP analysis, Wilson Center, XCEPT Research, Horn Review, New York Times.

Egypt is the clearest case. Cairo's posture in the Horn is driven principally by the Grand Ethiopian Renaissance Dam, which it treats as an existential threat to its Nile water security. Its interventions look less like a set of isolated moves than a coordinated campaign to encircle and contain Ethiopia.

Egypt signed a defence pact with Somalia in August 2024, deployed military forces and weapons to Mogadishu, and committed up to 5,000 troops to the African Union stabilisation mission now replacing the one in which Ethiopia is a principal participant. At the same time it has deepened security cooperation with Eritrea and the SAF, supplying the Sudanese army with fighter jets, training, and reportedly direct drone operations.[19] On the Middle East side of the Red Sea, Egypt is also a frontline manager of the Gaza border, the custodian of the Suez Canal through which Red Sea shipping must pass, and a long-standing recipient of Gulf financial support. Its anti-Ethiopia campaign in the Horn and its Red Sea posture in the Middle East are two faces of a single strategy built around the Nile and the maritime corridor.[20]

Türkiye works across both conflict systems through a mix of mediation, arms sales, and direct military presence. In the Greater Middle East it maintains forces and proxies in Syria and Iraq, intervenes in Libya, and arms multiple theatres through its Bayraktar drone exports. In the Horn it has become a significant supplier of arms and drones to the Sudanese army, holds long-standing basing and training arrangements in Somalia, and brokered the December 2024 Ankara Declaration that partially de-escalated the Ethiopia–Somalia rupture over the Somaliland port deal. Türkiye therefore plays a dual role: it fuels conflict by arming combatants in Sudan and the Levant, and dampens it through mediation in the Horn. That combination is itself a coupling mechanism, because the diplomatic and military weight Ankara brings to bear in the Middle East is what gives it leverage in the Horn.[21]

Israel is the newest entrant to the Horn and the clearest illustration of how a Middle East conflict reaches across the Red Sea. Its recognition of Somaliland on 26 December 2025, the first by any UN member state, was framed as a Red Sea security measure to counter Houthi threats and secure access to the port of Berbera. The move advanced an emerging UAE–Israel–Ethiopia alignment and sharpened the encirclement dynamics already in play. Israel's principal strategic project, the campaign to degrade Iran and its axis of resistance, is the central organising event of the contemporary Greater Middle East system. Israel is the state most responsible for reshaping the Middle East balance and is now also acquiring stakes on the African side of the Red Sea.[22]

Egypt, Türkiye, and Israel show that the coupling of the Horn and the Middle East cannot be reduced to Gulf state financial influence. It is sustained by a small set of states that are structurally embedded in both systems at once, pursuing aims that necessarily span the two: Nile security, regional influence, Red Sea access, and the containment of Iran.

The Iran war as a coupling event

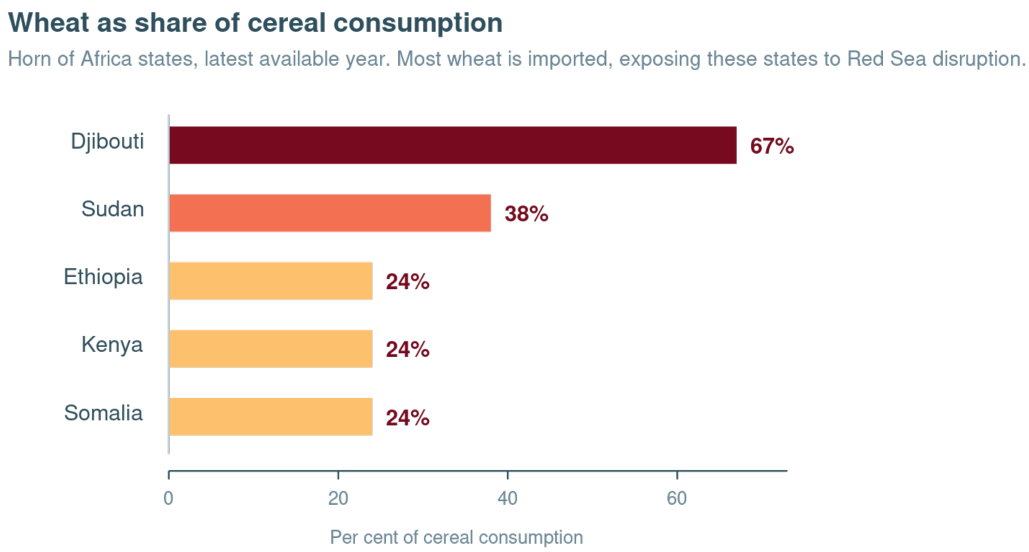
The 2025–26 US and Israeli military campaign against Iran has introduced a new layer of structural instability that runs across both systems. Three of the nine mechanisms are particularly affected. Gulf patrons are re-prioritising, which alters external sponsorship. Red Sea maritime corridors have been disrupted, which affects illicit flows. Food and energy price shocks are translating into fiscal stress in import-dependent states, which reduces state capacity.[23]

The most immediate channel is economic. Wheat accounts for approximately 67 per cent of total cereal consumption in Djibouti, 38 per cent in Sudan, and roughly 24 per cent in Ethiopia, Kenya, and Somalia, as shown in Figure S9. Oil prices reached US$119 a barrel in March 2026, with analysts warning of US$150 if both the Strait of Hormuz and Bab al-Mandab are disrupted for extended periods. For Ethiopia, any sustained decline in maritime traffic through Bab al-Mandab will strain Djibouti's import-dependent economy and jeopardise the movement of food and supplies for over 120 million people.[23]

FIGURE S9

Wheat as share of cereal consumption, Horn of Africa states

Djibouti is the most exposed at 67 per cent, with Sudan, Ethiopia, Kenya, and Somalia following.



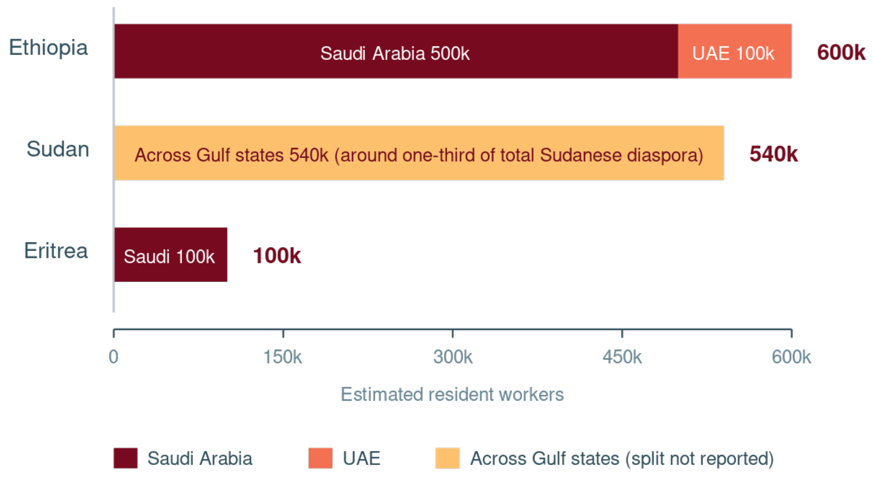
Source: FAOSTAT food balance sheets, FEWS NET regional analysis.

The second channel runs through the Gulf states themselves. An estimated 500,000 Ethiopians and 100,000 Eritreans work in Saudi Arabia alone. A further 100,000 Ethiopians work in the UAE, and 540,000 Sudanese work across Gulf states, roughly a third of the entire Sudanese diaspora, as shown in Figure S10. For many households in the Horn, these remittances are the fiscal architecture that finances food, healthcare, and education. As the Gulf states turn inward to manage their own security, the strategic importance of Horn states for Saudi Arabia and the UAE may diminish, at least temporarily.

FIGURE S10

Horn-origin workers resident in Gulf states

Over 1.2 million workers from Sudan, Ethiopia, and Eritrea live in the Gulf, sending home the remittances that finance basic household consumption.



Source: Council on Foreign Relations, ILO labour migration estimates, Migration Policy Institute, press reporting.

The Iran war does not override local dynamics. It is a force multiplier on existing fragilities, and it arrives at a moment when those fragilities are unusually sensitive to external shocks. By re-directing Gulf attention, disrupting Red Sea shipping and pushing food and fuel prices higher in import-dependent states, it amplifies the mechanisms that already drive conflict spread in the region.

Why the Clusters Are Emerging

Conflict clusters are not only intensifying, but also growing to the point that multiple systems are often overlapping. This is being caused by a structural transformation in the international order. The clusters are not local problems that happen to coincide. They are the regional signature of a global shift from a unipolar, American-policed order toward a fragmented, multipolar one in which influence is more widely distributed and harder to coordinate. There are three key drivers of this increasing intensification:

- The end of unipolar conflict management
- The growing influence of middle-power nations
- The weaponisation of economic interdependence

The systemic drivers

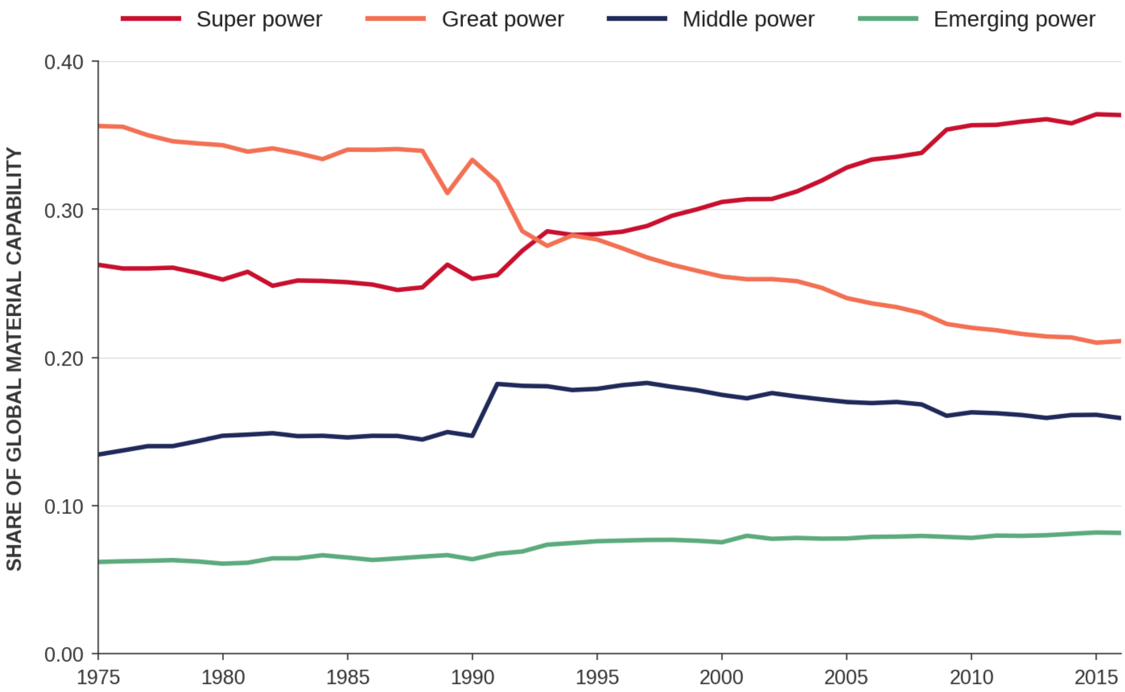
The first driver is the end of unipolar conflict management. The era in which a single superpower could contain or freeze regional crises has passed, and the cascade of frozen and simmering conflicts that turned active after 2022 is the symptom. Great powers preoccupied with manoeuvring against and colluding with one another are too distracted to respond when smaller powers, middle powers, and non-state actors collide. So even when the great powers avoid war with each other, their inattention permits war elsewhere. This is the weak conditioning described in the nine mechanisms: the absence of any external actor willing and able to suppress the mechanisms of spread.

The evidence is consistent. Geopolitical risk now exceeds Cold War levels. The share of global material capability held by the five permanent members of the UN Security Council has fallen from roughly 55 per cent to 40 per cent, as shown in Figure S11.[24] And as vetoes have risen, Security Council resolutions have declined, leaving the one body designed to coordinate responses increasingly gridlocked.[25] The retreat of the UN mediation and conflict management system is what opens the way for eight regional contests over who manages in its place.

FIGURE S11

Distribution of global material capability by power tier, 1975–2015

The share of capability held by traditional great powers has fallen since 1990, while super-power and middle-power shares have diverged.



Source: Correlates of War, National Material Capabilities v6.0

The second driver is the proliferation of middle powers with the means and motive to sponsor conflict abroad. The number of states wielding significant influence in five or more other countries has almost tripled since the end of the Cold War, from 13 to 34. The count of middle powers has nearly doubled, from nine in 1991 to 16 in 2024.

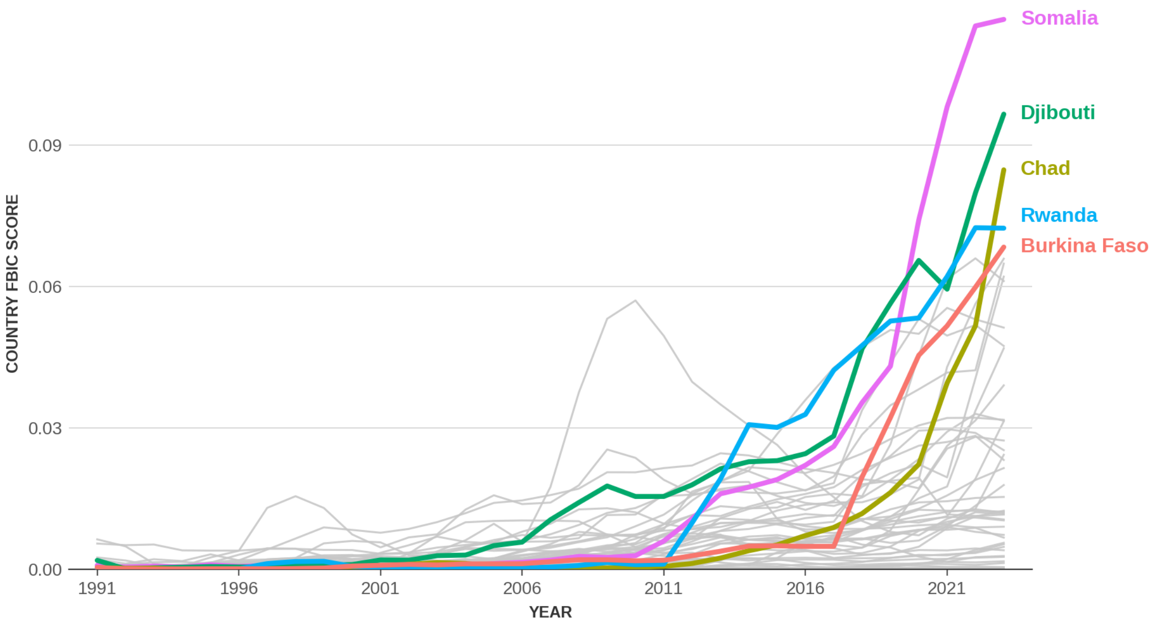
The emerging middle powers, such as the Gulf states and Türkiye, are not the institutionally embedded, Western-aligned middle powers of the late twentieth century. They pursue strategic autonomy, hedge between Washington and Beijing, and project influence through exactly the channels identified in the nine mechanisms of conflict spread: arms transfers, sovereign-wealth investment, port and basing networks, drone exports, and direct sponsorship of factions in other states' wars. The same actors that are spearheading the emergence of middle powers are, at the regional level, the sponsors that bind the Horn and the Middle East together.[26]

The growth of middle-power sponsorship is visible in country-level data on external influence. Figure S12 plots the Formal Bilateral Influence Capacity (FBIC) score, which measures the influence exerted on each country, in this instance by Turkiye, for five states at the centre of the systems set out earlier in this report. Somalia, Djibouti, Chad, Rwanda, and Burkina Faso all show steep increases since 2010, against a global distribution that has barely shifted. Where state institutions are weakest, the mechanisms of conflict spread have the most material to act on, and the supply of external actors willing to act is rising.

FIGURE S12

Turkish influence in Africa, 1991–2024

Several states at the centre of active conflict systems have seen steep increases in external influence over the past decade.



Source: FBIC dataset, Pardee Centre

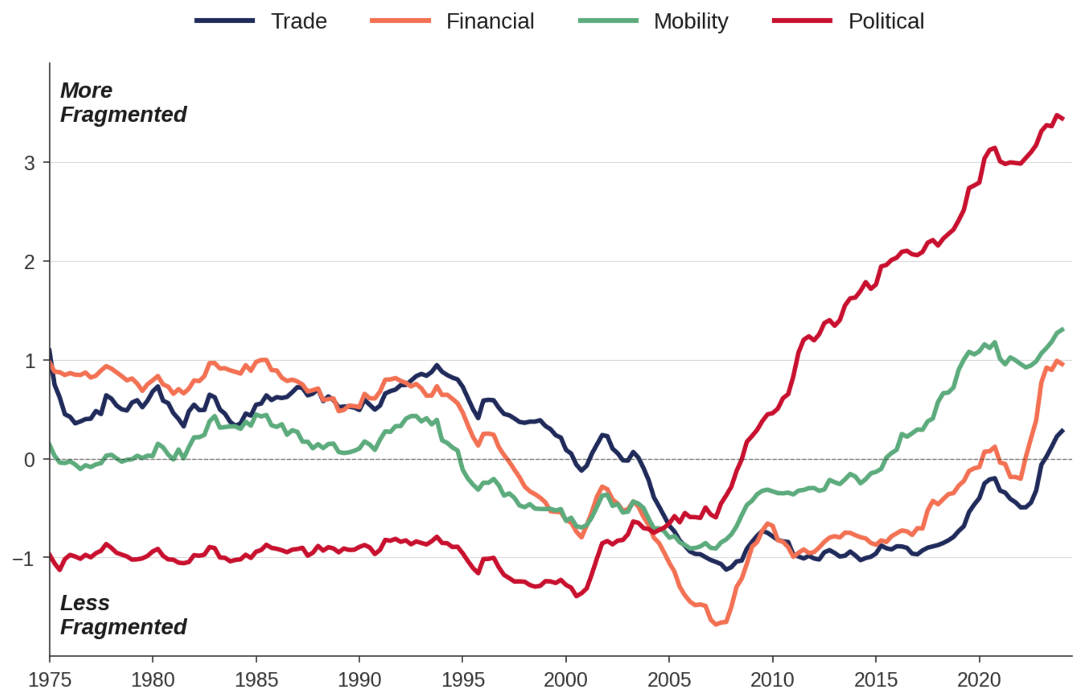
The third driver is the weaponisation of economic interdependence. The integration that once stabilised relations has plateaued. Global trade has sat at around 60 per cent of GDP for a decade, and is now used as a tool of statecraft through sanctions, export controls, supply-chain decoupling, and the deliberate cultivation of dependency.

Figure S13 shows fragmentation rising across financial, mobility, political, and trade dimensions since the global financial crisis. For conflict systems this matters in two ways. It converts trade routes, commodity corridors, and chokepoints into objects of contention rather than shared infrastructure, which is why Red Sea access, the gold corridor to Dubai, and the Bab al-Mandab figure so heavily in the Horn's wars. It also transmits shocks rapidly across a tightly coupled system, so that a disruption originating in one region propagates into another through food and fuel prices. Interdependence has become a vector of spread rather than a brake on it.[27]

FIGURE S13

Geopolitical fragmentation by dimension, 1975–2024

Political fragmentation has risen sharply since 2008, with financial, mobility, and trade fragmentation following.



Source: Geopolitical Fragmentation Index

Could conflict systems merge?

The Horn and the Greater Middle East are increasingly interlocked, but they remain two separate conflict systems. Several specific, observable conditions would mark a transition from coupling to merger, and each maps onto one of the nine mechanisms.

The first is sponsor consolidation. The same external backers would come to support the same coalitions in both regions, so that a single alignment, rather than two regionally distinct contests, organises the violence on both sides of the Red Sea. The emerging UAE–Israel–Ethiopia axis, set against a Saudi–Egypt–Türkiye reaction, is the clearest candidate. If those alignments fused the Middle-Eastern and Horn theatres into one sponsorship map, the external-sponsorship mechanism would link the clusters at their cores rather than at their edges.

The second is the conversion of the Red Sea from a shared corridor into a single contested space, in which Houthi interdiction, Gulf port competition, and the militarisation of Bab al-Mandab and the Suez approach are all managed as one theatre. At that point the illicit-economy and chokepoint mechanisms would collapse into a continuous zone running from Hormuz to Bab al-Mandab.

Both conditions could be triggered at once by a single shock: a new war pitting Eritrea, allied with several armed groups inside Ethiopia, against the Ethiopian state, coupled with the outbreak of open conflict spanning Darfur to the Red Sea.

Conclusion

The world's major active wars fall into eight regional clusters bound together by identifiable mechanisms: refugees, arms, illicit economies, sanctuaries, ethnic kin, sponsors, ideology, demonstration effects, and the conditioning weakness of neighbouring states. Treating conflicts as systems, rather than as a list of countries or a single global phenomenon, makes a set of practical questions tractable:

- **Why is Sudan's war so resistant to resolution?** Because its illicit-economy structure lets it finance itself without depending on any single sponsor.
- **Why is the Ethiopia–Eritrea axis the Horn's most acute war risk?** Because Red Sea access has structural value to both states, and Gulf alignment has placed them on opposite sides of Sudan.
- **Why does the Iran war matter for the Horn?** Because the Gulf states that bridge the two regions are also the dominant external sponsors in each.

The clusters are not closed. They are the regional symptoms of a global shift in the international order. The end of unipolar conflict management, the spread of capable middle-power sponsors, and the weaponisation of economic interdependence each create conditions in which the mechanisms of conflict spread have more material to work with and fewer brakes to hold them back. The supply of sponsors is rising, while the supply of system-wide managers is falling. The mechanisms that bind regional wars together are operating with fewer constraints than at any point since the early 1990s.

Country-by-country analysis underestimates how durable these wars are, because it treats each as a separate puzzle to be solved. System-level analysis makes the shared inputs visible, such as gold, drones, sponsorship, and refugees, and shifts the question from how to end one conflict to how to interrupt the mechanisms that sustain several at once.

The eight systems differ in which mechanisms dominate, and therefore in which policy tools are likely to work. In Eastern Europe and the Greater Middle East, the principal lever is cutting external sponsorship. In Mainland Southeast Asia and the Andean corridor, it is cutting illicit revenue. In the Horn, all nine mechanisms are active at once, which is why the conflicts there are so hard to resolve.

The Horn–Middle East coupling is the most consequential cluster pairing to watch over the next decade. It runs through real, identifiable infrastructure: a small number of bridging states, a single maritime corridor, a single commodity in gold, and a single set of sponsors. Each of those is in principle addressable. The question is whether the international system still has enough coordination capacity to act on them while they are couplings, before they merge into a single conflict system.

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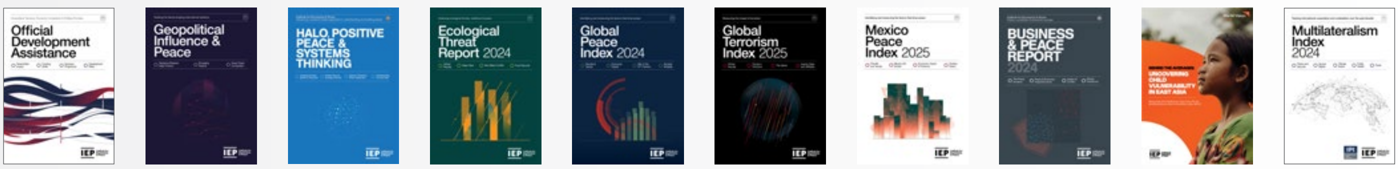

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