

MONTHLY POLICY BRIEFING

The Emerging Red Sea Security Contest

Contents

ASSESSMENT

Executive Assessment

PART I — THE NEW REGIONAL ARCHITECTURE

1. A Strategic Shift After Israeli Recognition
2. The Mecca Defense Alliance: A Trilateral Axis
3. The UAE–Israel Counter–Axis and Hardware Integration
4. The US Diplomatic Pivot of June 2026

PART II — TÜRKIYE IN SOMALIA

5. From Training Partner to Maritime Security Actor
6. The M/V Lutuf Incident: A Kinetic Precedent

PART III — SAUDI ARABIA AND THE MARITIME ORDER

7. Defense Partner, Market Power, and Red Sea Actor
8. Overlapping Maritime Coalitions and Somaliland’s Exclusion

PART IV — THE NORTHEAST

9. Northeast Intelligence: The Proposed SNA 26th Division
10. Lasqoray: The Critical Maritime Indicator
11. The Financing Claim, Reassessed After Mecca
12. Puntland and the UAE: A Second Pressure Point

PART V — THE WIDER GULF FRACTURE · new in this edition

13. The UAE’s Exit from OPEC and the Mukalla Strike
14. Egypt’s Encirclement Diplomacy
15. Regional Context: The 2026 Iran War
16. AUSSOM’s Funding Cliff and the Onshore Vacuum
17. Pakistan’s Quiet Entry into the Somalia Relationship
18. Piracy’s Return: A Third Security Layer
19. Economic Transmission to Somaliland Households

PART VI — ASSESSMENT AND RESPONSE

20. What Is Actually Emerging?
Somaliland’s Assets, Precisely
Scenario Watch
Policy Recommendations
GSI September Watchlist
Strategic Bottom Line

GSI POLICY BRIEF

Executive Assessment

The security environment around Somaliland is entering a new phase. Israel's recognition of Somaliland in December 2025 strengthened Hargeisa diplomatically, but it also accelerated a countervailing alignment around Mogadishu. Türkiye is expanding from military training into naval capacity-building and operational maritime support; Saudi Arabia is deepening defense, maritime, and economic engagement with Somalia; Egypt and Djibouti remain important supporters of Somalia's territorial integrity; and the UAE retains strategic positions in Berbera and Bosaso. The result is not yet a formal bloc confrontation, but the Somaliland–Somalia dispute is increasingly embedded in a wider Red Sea security competition.

August 2026 accelerated that process sharply, and by month's end, had moved from political convergence to institution-building. A trilateral collective-defense treaty now binds Türkiye, Saudi Arabia, and Pakistan and, as of 31 August, has a permanent secretariat; a separately branded Saudi-led maritime alliance gives that coordination an operational command structure in the Gulf of Aden; Pakistan has quietly opened its own bilateral defense channel with Mogadishu; and piracy has returned to the Gulf of Aden as a distinct, serious security layer. Somaliland is a member of none of these structures. *A second, parallel fracture inside the Gulf camp itself, the UAE's exit from OPEC, the Saudi strike on a UAE-linked weapons shipment at Mukalla, and Riyadh's expanding coalitions that pointedly exclude Abu Dhabi are now material enough to affect how Somaliland should read its own UAE relationship and are addressed directly in Part V below.*

31 Aug Mecca Defense Alliance gains a permanent Riyadh secretariat and Pakistani secretary-general	6+ Vessels held by pirates in the Gulf of Aden as of 24 August 2026, per IMO (90+ seafarers)	0 / 3 New Red Sea security structures (Mecca Alliance, maritime alliance, DCoC task force) in which Somaliland holds a seat	~50% Bab el-Mandeb transits vs pre-attack levels, IMF estimate, April 2026
--	--	---	--

KEY JUDGEMENT

The principal risk to Somaliland *is not an imminent conventional attack*. It is incremental strategic encirclement: Mogadishu converting external diplomatic support into institutions, military structures, coastal access, and maritime capability that gradually alter the balance of power. What changed in August 2026 is the *rate* at which that conversion is now possible — and a weakened federal security backbone on the ground raises the stakes of whether that conversion succeeds or stalls into disorder.

SOURCE STATUS AND HANDLING

This briefing draws on three distinct evidentiary streams, which are kept separate throughout. *Open-source material* — official statements, agreements, and established reporting — is cited in full. *GSI analytical judgment* is labeled as such wherever it appears. Sections 9 to 11 additionally draw on *confidential reporting from three Somali defense and security sources*, each positioned close enough to federal military planning to observe command-level decisions directly. Their identities, appointments, and locations are withheld. Their accounts have been cross-checked against one another where the subject matter overlapped, but key elements remain independently unverified and are treated as *intelligence indicators rather than established facts*. ²²

WHAT CHANGED, JUNE–AUGUST 2026

June 2026. State Department report to Congress classifies Somaliland as a “region of Somalia,” placing US–Somaliland security cooperation under Mogadishu’s effective veto, while, in the same report, identifying Somaliland as a potential partner on Red Sea security and minerals.¹⁰

31 July 2026. Saudi Arabia launches a fourteen-nation Red Sea maritime coalition headquartered in Riyadh. Somalia and Türkiye are members; the UAE and Somaliland are not.

7 August 2026. Türkiye, Saudi Arabia, and Pakistan sign the Mecca Joint Defense Agreement, treating an attack on one as an attack on all. The UAE and Egypt are outside it; on 31 August, the three states named it the Mecca Defense Alliance.

8 August 2026. Ethiopian AUSSOM troops withdraw from Burhakaba, between Mogadishu and Baidabo, after 12 years, handing the Al-Shabaab-ringed town to the Somali National Army, the onshore counterpart to the maritime story detailed in Section 16.

17–23 Aug 2026. M/V Lutuf hijacked off Eyl; unclaimed air strikes near Garmaal and Jiifle kill at least thirteen; Puntland and Mogadishu dispute who may authorize force on the coast. The vessel is released around 30–31 August amid a disputed ransom claim.

On **18 August 2026**, the Djibouti Code of Conduct endorsed a Combined Task Force for the Western Indian Ocean and Gulf of Aden. Upcoming meetings, especially the one in Mombasa on **7–9 September**, will define command, membership, scope, financing, and operations. Somalia and the UAE participate, while Somaliland remains outside formal representation.

PART I

The New Regional Architecture

1 A Strategic Shift After Israeli Recognition

Israel's recognition of Somaliland on 26 December 2025 represented a geopolitical turning point. Saudi Arabia immediately reaffirmed its full support for Somalia's sovereignty, unity, and territorial integrity, while Türkiye issued a similarly firm rejection.¹ In January 2026, Saudi Arabia, Türkiye, Egypt, Djibouti, Qatar, Pakistan, and other states joined wider diplomatic statements opposing recognition and supporting Mogadishu's territorial position.

At the same time, Somalia's relationship with the UAE deteriorated sharply. On 12 January 2026, Mogadishu announced the termination of agreements with the UAE covering security, defense, and port arrangements, explicitly including Berbera, Bosaso, and Kismayo.² Somaliland, Puntland, and Jubaland rejected Mogadishu's authority to terminate their UAE relationships.

Actors are better read as distributed across a spectrum than sorted into two camps. Saudi Arabia illustrates the point directly: it rejects Somaliland's recognition on sovereignty grounds while its economic convergence with Somaliland, through the livestock trade addressed in Section 7, persists regardless.

GSI ASSESSMENT

This is best understood as **overlapping strategic networks rather than two fixed camps**. Somaliland is increasingly associated with Israel and the UAE, while Somalia is drawing more heavily on Türkiye, Saudi Arabia, Egypt, and Qatar. The Saudi–UAE rivalry matters, but it does not explain everything. Riyadh has independent interests in Bab el-Mandeb, Yemen, Red Sea navigation, food security, and the preservation of internationally recognized states.

2 The Mecca Defense Alliance: A Trilateral Axis

On 7 August 2026, President Recep Tayyip Erdoğan, Crown Prince Mohammed bin Salman, and Prime Minister Shehbaz Sharif signed a joint defense agreement in Mecca committing Türkiye, Saudi Arabia, and Pakistan to treat an armed attack on any signatory as an attack on all. The agreement extends beyond that clause to intelligence sharing, capacity building, defense manufacturing, and cooperation on energy and defense expenditure.³ It

builds on the Strategic Mutual Defense Agreement Saudi Arabia and Pakistan had already signed on 17 September 2025, extending it to include Türkiye.²⁷

Institutionalization followed quickly. On 31 August, the foreign ministers, defence ministers and chiefs of staff of all three states — Türkiye's Hakan Fidan, Yaşar Güler and Selçuk Bayraktaroğlu; Saudi Arabia's Faisal bin Farhan, Khalid bin Salman and Fayyad bin Hamed Al-Ruwaili; and Pakistan's Ishaq Dar, Khawaja Muhammad Asif and Field Marshal Asim Munir — met in Istanbul as the first Strategic Political and Defence Committee, formally named the pact the **Mecca Defence Alliance**, and agreed a permanent secretariat based in Riyadh, with Pakistan providing the first Secretary-General for an initial three-year term.^{28,36} Fidan said the alliance was “established with the aim of expanding” and that Ankara was preparing a roadmap for other states to accede, reportedly including Egypt and Bangladesh; Turkish briefings have separately described planned joint land, sea and air exercises and cooperation on air defence, unmanned systems and electronic warfare.^{39,36}

The logic of the pact is complementarity rather than symmetry. Türkiye contributes NATO's second-largest military and a mature defence-industrial base; Saudi Arabia contributes financial depth as the world's largest oil exporter; Pakistan contributes manpower, combat experience, and nuclear capability, though analysts are clear that its deterrent is very unlikely to formally extend to its two partners.²⁷ Analysts also caution that this is not a NATO-style alliance and that its commitments are less binding than those under Article 5 — but it does provide the three states with a declared framework for coordinating procurement, financing, and deployment.⁴

For the Horn of Africa, two absences matter more than the signatures. *The UAE is not a party*. Nor is Egypt, despite having taken part in earlier four-nation discussions.⁵ Emirati reaction was openly critical: commentators argued that the agreement weakens Gulf cooperation, while Saudi voices replied that states retain a sovereign right to form their own alliances. Reporting links the friction to a wider Saudi Emirati divergence over Yemen and Sudan, a divergence these briefing traces in full in the new Section 13.⁶

For Israel, the concern is a coordinated Sunni deterrent that raises the cost of regional operations and narrows its freedom of military movement — a structure that, in the words of one analysis, “pushes back and extracts a cost.”⁷ Neither the Israeli prime minister's office nor the foreign ministry commented publicly; Turkish officials described the accord as defensive in nature and not directed at any specific actor.³

GSI ASSESSMENT

Mecca changes the meaning of the phrase “Turkish Saudi Pakistani military cooperation” when it appears in reporting on Somalia. Before 7 August, it described a set of separate bilateral relationships. Afterward, the three states share a declared collective-defense framework, a common financing logic, and an institutional rationale for coordinating expenditure and deployment. *Somaliland’s two closest partners — the UAE and Israel — sit outside the pact and are, in different ways, unsettled by it.* This is the most significant structural change in the regional environment since Israeli recognition, and it directly raises the plausibility of the financing claim examined in Section 11.

3 The UAE–Israel Counter-Axis and Hardware Integration

Somaliland’s association with the UAE and Israel is usually described in diplomatic and commercial terms. It now has a concrete military–hardware dimension.

During the 2026 conflict with Iran, Israel deployed an Iron Dome battery to the UAE — the first deployment of that system outside Israel and the United States — together with the Iron Beam laser interceptor and Spectro, an electro-optical suite used to detect drones at ranges of roughly twenty kilometers. Israeli personnel deployed alongside the systems to operate them.⁸ US officials subsequently publicly confirmed the Iron Dome deployment.⁹ A regional official quoted in the reporting described it as proof of “the value of being Israel’s friend.”⁸

The contrast with the Mecca framework is instructive. The Israel–UAE relationship is technological, nimble, and quickly deployable, resting on interoperability and small numbers of specialists. The trilateral framework is heavier and more capital-intensive: manpower, financing, industrial production, and formal treaty language. Riyadh is also hedging in parallel with Washington and Tehran, which limits how far it will allow the pact to define its policy.

GSI ASSESSMENT

Somaliland's partners are not a bloc, as Mogadishu's increasingly are. Israel and the UAE offer capability, technology, and speed, but no collective-defense guarantee — and neither has shown an appetite for extending deterrence to the Gulf of Aden coastline. Hargeisa should therefore treat the Israel-UAE relationship as a **source of capability and access, not as a security umbrella**, and should avoid public positioning that implies a guarantee neither partner has offered.

4 The US Diplomatic Pivot of June 2026

In June 2026 the State Department submitted its annual report to Congress under the Somaliland Partnership Act, which was incorporated into the Fiscal Year 2023 National Defense Authorization Act. The report stated that the United States recognises the sovereignty and territorial integrity of the Federal Republic of Somalia, “which includes the region of Somaliland.”¹⁰

The classification matters more than its brevity suggests. By describing Somaliland as a region rather than a de facto state, the report subordinates any independent security relationship to Mogadishu's approval. The report itself is more two-sided than that headline suggests: it also identifies Somaliland's proximity to Bab el-Mandeb, Berbera's port and airfield capacity, and access to critical minerals as areas where deeper engagement could serve US interests, and it confirms continuing contacts between AFRICOM and Somaliland authorities — while declining Somaliland's offer of basing rights in exchange for formal recognition.¹⁰

GSI ASSESSMENT

This is the most consequential setback to Hargeisa's external position since December 2025, and it runs counter to the Israeli decision. Its practical effect is that *any strategy built on consolidating Israeli recognition cannot assume American follow-through*. Congressional interest in Somaliland remains real and should be worked deliberately — the report's own acknowledgment of Somaliland's strategic value is a lever, not just a caveat — but executive-branch language now gives Mogadishu a procedural veto precisely the security relationship that would matter most in a contingency.

PART II

Türkiye in Somalia

5 From Training Partner to Maritime Security Actor

Türkiye remains Somalia's most consequential external security partner. TURKSOM, established in Mogadishu in 2017, created a long-term platform for officer training, force development, and institutional support. The February 2024 ten-year Defense and Economic Cooperation Framework Agreement expanded this relationship into maritime security, including assistance to build, train, and equip Somali naval capabilities.¹¹

The trajectory is increasingly clear. On 28 August 2026, Türkiye announced that TCG Kemalreis and TCG Yzb. Güngör Durmuş would visit Djibouti on 3–4 September in support of the Somali Naval Task Group and logistical missions.¹² This followed renewed maritime insecurity, including the August hijacking of the Cameroon-flagged M/V LUTUF off Puntland, examined in the next section.¹³

Türkiye's footprint in Somalia is not limited to training and naval support. A space and ballistic-missile launch site near Warsheikh, roughly seventy kilometres north of Mogadishu, has been under construction since October 2025 and was publicly framed as a civilian space partnership in December 2025; French and Israeli reporting since indicates the roughly \$350 million facility — designed for a first phase in 2027 — is also configured to test long-range ballistic systems, with a range that multiple analyses place inside Somaliland but outside Israel.¹⁴ Whatever its final configuration, it establishes strategic infrastructure on the Somali coast that Ankara has a direct interest in supplying and protecting.

This should not be directly described as a Turkish deployment against Somaliland. There is no verified evidence of such an operation. The strategic significance lies elsewhere: Ankara is demonstrating the capability and political will to link military support in Somalia to sustained operations in the Gulf of Aden, and to signal this to its rivals. The long-term question for Somaliland is therefore *where a stronger Somali navy will eventually claim and exercise jurisdiction*.

6 The M/V Lutuf Incident: A Kinetic Precedent

The hijacking referenced above deserves closer treatment, because of what followed it rather than the seizure itself.

The general cargo vessel M/V Lutuf, Cameroon-flagged, was seized on 17 August 2026 roughly 3.5 nautical miles off Marraya in Eyl district and moved toward the Nugaal coast. Its ten crew comprised six Indian nationals, one Turkish national, one Georgian, and two Serbian security guards. Reporting indicates the vessel was carrying Turkish-manufactured weapons, communications equipment, and satellite equipment destined for Turkish military facilities in Somalia¹⁵ — cargo that ties the incident directly to the infrastructure programme described in Section 5.

Two air strikes followed. On 18 August, a strike near Garmaal in Dangoroyo district killed four people and wounded two; Puntland identified the dead as civilian fishermen, and President Said Abdullahi Deni publicly criticised the killings, saying suspected pirates should face legal proceedings rather than be killed without due process.¹⁵ On 23 August, further strikes near Jiifle in Godob-Jiraan district killed eight to nine more, bringing the reported total to at least thirteen.¹⁶

No actor has claimed responsibility. Puntland's deputy security minister, Abdirahman Yusuf Dujana, told the BBC Puntland believed Türkiye conducted the strikes and suggested federal involvement, citing information on Turkish movements around the vessel and the surrounding coastline, while offering no independent verification.¹⁶ Türkiye's foreign ministry told the BBC Somali service that it had “no information” about the operation — a formulation that stops short of a denial.¹⁷ Somalia's state minister for defence, Omar Ali Abdi, said the federal government was aware of military operations along the Puntland coast and was preparing a report, and asserted that any counter-piracy operation on Somalia's coastline would legally require federal authorisation.¹⁶

UPDATE SINCE 29 AUGUST — TWO CONFLICTING OFFICIAL ACCOUNTS

The M/V Lutuf and its crew were freed around **29–30 August 2026**, after twelve days in pirate hands — but Mogadishu and Puntland give **directly conflicting accounts** of how, and neither has been independently verified. Somalia's federal Ministry of Defense said Turkish and Somali forces conducted a ten-day joint military operation that killed 14 alleged pirates and destroyed four pirate boats before the remaining hijackers fled, freeing the vessel under the Türkiye–Somalia defense cooperation agreement.⁴⁰ Puntland's Ministry of Security and DDR explicitly **rejected** that account hours later, stating there was “no operation by the Federal Government of Somalia and or Türkiye that rescued the vessel,” and accused federal and Turkish representatives of paying the pirates a ransom instead.⁴¹ A local community elder told the Associated Press only that the vessel and crew had been freed, without confirming the mechanism.⁴⁰ Specialist outlets are treating this as an open dispute between the two governments' accounts, not a resolved fact, and GSI does the same.⁴²

GSI ASSESSMENT

The precedent matters more than which account is correct. Whether the ship was freed by force or by payment, three things are now established. **External actors — Turkish, federal Somali, or both — are willing and able to act operationally on the Somali coast**, regardless of the method used. Mogadishu and Puntland cannot agree in public on a single fact pattern regarding their own coastline, underscoring the jurisdictional fragmentation that Part IV addresses directly. And a federal member state's public rejection of the central government's own account carries no apparent operational consequence. For Somaliland — which claims exclusive authority over the Berbera coastline and its approaches — and for the UAE, whose port investments sit on that same coast, this is the first live test of what “operational maritime presence” and “contested attribution” look like in practice, three weeks apart, with civilian casualties, a constitutional dispute, and now two governments publicly calling each other's account false.

PART III

Saudi Arabia and the Maritime Order

7 Defense Partner, Market Power, and Red Sea Actor

Saudi engagement operates through several mutually reinforcing instruments. Riyadh and Mogadishu signed a security cooperation agreement in November 2023.¹⁸ In February 2026, the relationship expanded through a military cooperation agreement,¹⁹ followed by maritime cooperation intended to strengthen shipping, connectivity, commercial vessel movement, and maritime expertise.²⁰

Saudi leverage is also economic. The Kingdom is a critical destination for livestock originating from the Somali territories. Saudi trade data indicate that live animals accounted for the overwhelming majority of Saudi imports from Somalia in 2025 — approximately US\$326 million out of a US\$337 million total, or some 97 per cent, with live sheep and goats alone worth US\$255 million.²¹ This gives Riyadh indirect influence over pastoral communities, exporters, quarantine facilities, and port economies across Somaliland, Puntland, and Somalia.

For Somaliland, Saudi policy creates a paradox. Riyadh rejects Somaliland's recognition, yet Somaliland's livestock exports, Gulf of Aden coastline, and proximity to Bab el-Mandeb directly serve Saudi interests. Treating Saudi Arabia as an irretrievable adversary would therefore surrender potentially useful economic and maritime channels to Mogadishu. After Mecca, Riyadh is simultaneously the financial anchor of the trilateral pact, the convenor of the Red Sea maritime coalition, and the principal market for Somaliland's largest export — a combination that makes a dedicated Saudi track more valuable, not less.

8 Overlapping Maritime Coalitions and Somaliland's Exclusion

Two multilateral maritime structures advanced in the weeks before this briefing, and Somaliland belongs to neither.

On 30 July 2026, Saudi Arabia convened states to launch the **Multinational Maritime Defense Alliance**, headquartered in Riyadh, to strengthen maritime security, protect freedom of navigation, and safeguard trade and energy corridors in Bab el-Mandeb, the Red Sea, and the Gulf of Aden — a response to Houthi interference with shipping. Its members include Bahrain, Bangladesh, Djibouti, Egypt, Jordan, Kuwait, Nigeria, Pakistan, Qatar, Somalia, Sudan, Türkiye, and Yemen; neither the UAE nor Oman is included.²³ On 3

August, President Erdoğan discussed Red Sea security with Crown Prince Mohammed bin Salman and publicly welcomed the initiative, and on 6 August Saudi Arabia appointed Rear Admiral Abdullah bin Salem Al-Shehri to command it, with responsibility for joint naval defense, planning and coordination.^{37,38} By mid-August, the alliance was moving toward operational activation – intelligence exchange, planning, exercises, and joint naval operations – and Turkish officials have said Ankara is preparing a roadmap for other states, reportedly including Egypt and Bangladesh, to accede formally.³⁹ The Houthis responded to the initial launch by threatening “full escalation.”²⁴

Separately, the Djibouti Code of Conduct (DCoC)/Jeddah Amendment framework is moving – more slowly than GSI’s 29 August draft indicated – toward a Combined DCoC Task Force. The DCoC Steering Committee recommended the task force at an extraordinary meeting on 29 July; national focal points endorsed that recommendation on 5 August and tasked Working Group 3 with developing its mandate, geographic scope, composition and operating arrangements, including the possible embarkation of coastal-state “sea-rider” officers aboard participating naval vessels. Nineteen DCoC/Jeddah Amendment signatories – including Somalia and the UAE, but not Somaliland – backed the proposal on 18 August. A WG3 workshop in Mombasa on 7–9 September is due to recommend a final structure; **the task force is not yet operational**, and its funding and command arrangements remain undecided.^{25,43}

VERIFICATION UPDATE

GSI’s 29 August draft described the Combined DCoC Task Force as already established. Official DCoC reporting shows a more precise status, corrected above: national focal points have endorsed the proposal and tasked Working Group 3 with developing the operational framework for later adoption – a materially earlier stage than “established.” This brief now uses the official formulation throughout.

Structure	Status as of 1 Sep 2026	Somalia	UAE	Somaliland
Multinational Maritime Defense Alliance (Saudi-led, Riyadh)	Operational; commander appointed	Member	Not included	Not included
Combined DCoC Task Force (proposed)	Endorsed in principle; WG3 drafting framework, due Sept	Backer	Backer	Not included

Structure	Status as of 1 Sep 2026	Somalia	UAE	Somaliland
Mecca Defense Alliance	Operational; permanent secretariat agreed 31 Aug	Not a member (convergence theatre)	Not included	Not included

GSI ASSESSMENT

Exclusion from these structures is in some respects more consequential than exclusion from recognition debates, because coalitions generate operating procedures, information-sharing protocols, patrol patterns, and legal understandings that harden over time – and the correction above does not change that trajectory, only its current stage. *Every month Somaliland is absent while the DCoC task force's mandate is being drafted, that mandate is being written without reference to Berbera or to Somaliland's coastguard.* A purely unilateral maritime doctrine will not solve this. Hargeisa needs a deliberate strategy for functional participation – through the Djibouti Code of Conduct framework, through bilateral arrangements with member states such as Djibouti and Saudi Arabia, and through commercial-security channels tied to Berbera's port operator – that does not require prior recognition as a precondition, and the fact that WG3's framework is still being drafted is a narrow window to try to influence it before it hardens.

PART IV

The Northeast

9 Northeast Intelligence: The Proposed SNA 26th Division

The reporting indicates that Mogadishu is planning to establish an **SNA 26th Division** in the Northeast administration centered on Las Anod. A delegation of military officers reportedly traveled to the area in August this year to conduct a census and registration of forces, followed by discussions over promotions, command appointments, and integration into the Somali National Army. The sources further report that President Abdikhadir Ahmed Aw-Ali “Firdhiye” was tasked with submitting recommendations for promotion to Somalia’s presidency.

If corroborated, this would mark an important transition from political recognition of the Northeast administration toward *formal military institutionalization*. The proposed command structure, reportedly designed to incorporate officers from different local constituencies, suggests a possible strategy of local force integration, clan balancing, and extension of federal authority rather than simple deployment of forces from southern Somalia.

10 Lasqoray: The Critical Maritime Indicator

The most consequential element of confidential reporting concerns Lasqoray. The sources state that Türkiye attaches strategic importance to the coastal area and that a military facility is planned, although no confirmed opening date has been identified. This claim requires continued corroboration. Open-source strategic commentary has separately raised the prospect of Turkish interest in a Lasqoray facility,²⁶ which increases the importance of monitoring the location without treating the base as already established.

Node	Location	Role in the described corridor
01	Las Anod	Political and military centre of the Northeast administration
02	26th Division	Potential federal integration of local armed forces
03	Sanaag	Territorial bridge toward the Gulf of Aden
04	Lasqoray	Potential coastal access, logistics, and surveillance point
05	Gulf of Aden	Connection to Somalia’s developing maritime capability

GSI ASSESSMENT

If the 26th Division and a Lasqoray facility both materialize, the issue changes from territorial consolidation to *land-maritime integration*. A federal military structure extending from Las Anod toward the coast could give Mogadishu a durable institutional and logistical presence in a zone where legal claim and effective control diverge: territory that Somaliland claims as its own under the boundaries it inherited at independence, that Puntland has long regarded as falling within its sphere, and that at present neither Hargeisa nor Garowe administers on the ground. That would put pressure on both Hargeisa and Garowe, though for different reasons. The Lutuf episode adds a further dimension: a coastal facility would not only host a presence but also create logistics worth defending kinetically.

11 The Financing Claim, Reassessed After Mecca

The confidential reporting further claims that Türkiye would initially finance salaries for personnel incorporated into the proposed 26th Division, with Saudi Arabia and partners associated with Turkish Saudi–Pakistani military cooperation potentially assuming future financial responsibility. Salary payments were reportedly not yet formally underway at the time of reporting.

When this claim was first assessed, the difficulty was that no formal Türkiye–Saudi–Pakistan mechanism existed to which such financing could be attached. The Mecca Joint Defense Agreement of 7 August changes that calculus. The pact expressly covers capacity building, defense expenditure, and defence manufacturing among the three states — precisely the categories under which third-country force generation would be funded.³ This does not verify the claim. It removes the structural objection to it and raises its prior plausibility from speculative to credible-but-unconfirmed.

Türkiye's defense relationship with Somalia and Saudi Arabia's expanding military cooperation with Mogadishu are independently verified. What remains unestablished is any specific decision to route trilateral resources to a Somali federal division. The claim should therefore remain an intelligence requirement, with verification focused on the indicators below.²²

Verification indicator	What would confirm it	Confidence
Biometric registration	Enrolment of Northeast forces into federal personnel systems	LOW

Verification indicator	What would confirm it	Confidence
Payroll systems	Salaries actually disbursed to 26th Division personnel, and by whom	LOW
Equipment deliveries	Materiel arriving in the Northeast under federal or partner supply chains	LOW
Trilateral budget lines	Mecca-framework expenditure or capacity-building allocations naming Somalia	LOW
Training teams	Turkish or partner trainers deploying to Las Anod or the Sanaag coast	MEDIUM
Command appointments	Formal SNA promotions and command postings gazetted in Mogadishu	MEDIUM
Official visits	Senior SNA or partner delegations travelling to the Northeast	MEDIUM

Table. Verification requirements for the financing claim. Confidence levels are GSI assessments derived from the reporting in Sections 9–11 and the Mecca framework in Section 2.

12 Puntland and the UAE: A Second Pressure Point

Puntland occupies an uncomfortable position. It maintains important security and commercial relationships with the UAE around Bosaso while depending heavily on Gulf livestock markets. Mogadishu's January 2026 attempt to terminate UAE agreements and its growing interest in direct federal security structures in the northeast therefore challenge both Garowe and Hargeisa.

The Lutuf strikes sharpened that position considerably. Puntland now has a public grievance over civilian casualties on its own coast, an unresolved dispute with Mogadishu over who may authorise force there, and a reason to question the reliability of external partners operating in its waters. Its warning that attacks on civilians in coastal areas could undermine relations between Puntland's security institutions and foreign partners was addressed to those partners as much as to Mogadishu.¹⁵

For the UAE, this creates a connected strategic problem. Berbera and Bosaso are not isolated investments. They form two major Emirati relationships along the Gulf of Aden. A stronger federal security presence between them, particularly if linked to Turkish maritime infrastructure, could affect the strategic environment surrounding both ports. Abu Dhabi therefore has an interest in stability, maritime awareness, and preventing local disputes from becoming instruments of wider regional competition — an interest made more acute

by its exclusion from the Mecca pact and from the Saudi-led Red Sea coalition, and by the wider fracture with Riyadh described next.

PART V

The Wider Gulf Fracture

This Part is new to the September edition. It draws entirely on open-source reporting gathered and verified for this update and situates the Somaliland-specific findings of Parts I–IV inside a broader Gulf and Horn realignment that GSI judges is now material to Somaliland's UAE relationship, Egypt track, and reading of the onshore security picture.

13 The UAE's Exit from OPEC and the Mukalla Strike

Two events, five months apart, mark the most serious open rupture between Saudi Arabia and the UAE in years — the same two Gulf states that sit on opposite sides of the Mecca pact and the Saudi-led maritime coalition.

On 30 December 2025, the Saudi-led coalition struck the Yemeni port of Mukalla, targeting what it said were two unauthorized weapons shipments that had arrived from the UAE's port of Fujairah for the UAE-backed Southern Transitional Council (STC), which had been advancing in Hadramout and Al-Mahra. Saudi officials called it a “limited” strike and reported no casualties; the UAE denied the shipments contained weapons.²⁹ Riyadh gave Emirati forces 24 hours to leave Yemen and, backed by a Saudi counteroffensive, the internationally recognized government retook the STC's territorial gains within days; the STC dissolved itself on 9 January 2026.³⁰ Analysts described the strike as an “unprecedented escalation” between the two Gulf powers and a sign Riyadh had “run out of patience” with Abu Dhabi's use of sub-state partners.³¹

On 28 April 2026, the UAE announced its withdrawal from OPEC and OPEC+, effective 1 May — ending 59 years of membership and removing the group's third-largest producer. Officials framed it as a national-interest decision to escape production quotas that constrained the UAE's spare capacity, but analysts broadly read the abruptness — three days' notice — as confirmation of a deeper Saudi–UAE divergence over Gulf leadership, Yemen, and Sudan that had been building for years.³²

GSI ASSESSMENT

Neither event is about Somalia or Somaliland directly, but both describe the same underlying pattern this briefing identifies in the Horn: *Riyadh asserting state-centric control over instruments Abu Dhabi has used to back agile, sub-state partners* – the STC in Yemen, and (per Parts I–IV) Somaliland, Puntland, and the RSF in Sudan. The Mecca pact and the Saudi-led maritime coalition are not incidental to this fracture; they are its institutional expression, and both pointedly exclude the UAE. For Somaliland, the implication cuts two ways. A UAE that is more isolated within the Gulf may be *more receptive*, not less, to deeper strategic coordination with Hargeisa – GSI's Recommendation 5 already anticipates this. But it also means Somaliland's most capable external partner is simultaneously more exposed to Saudi and Turkish pressure, reinforcing Section 3's caution against treating the UAE relationship as a security guarantee.

14 Egypt's Encirclement Diplomacy: A Port Agreement with Every State on Ethiopia's Route to the Sea

Egypt's Red Sea diplomacy has followed a consistent pattern since late 2025: a bilateral port or maritime-transport instrument with each state through which Ethiopian trade could plausibly reach the sea, paired with a standing Egyptian assertion that Red Sea security is the exclusive responsibility of its littoral states.³³

Cairo signed a container-terminal and logistics-zone agreement with **Djibouti** in December 2025; a maritime transport agreement with **Eritrea** in Asmara on 16–17 May 2026, establishing a direct shipping line and committing both governments to development at the ports of Assab, Massawa, and Marsa Fatima;³⁴ and, on 9 July 2026, Somalia's Council of Ministers approved a maritime transport and ports-cooperation MoU with Egypt – concluded during Türkiye's Fifth Maritime Summit in Istanbul – completing a set of instruments touching every coastal state adjoining Ethiopia.³⁵ Egypt frames the pattern as commercial and administrative; regional analysts read it as a coastal containment strategy responding to the Grand Ethiopian Renaissance Dam's completion, which Cairo regards as a threat to its water security.³³ Egypt has also deployed thousands of troops to Somalia under AUSSOM (Section 16) alongside the diplomatic track.

GSI ASSESSMENT

The Egypt track is a standing feature of the Somalia relationship (Part I already lists Egypt among the states that rejected Israel's recognition), but its ports diplomacy specifically — now covering Djibouti, Eritrea, and Somalia — has advanced quietly enough that it can be underweighted next to the more dramatic Mecca and Lutuf stories. It matters for Somaliland for one direct reason: *it is a second, independent channel — alongside Türkiye and Saudi Arabia — through which Mogadishu can present itself as embedded in a wider coalition of coastal states, reinforcing the exclusion pattern documented in Section 8. GSI sees no evidence that Egypt has a Somaliland-specific agenda; its logic is Ethiopia-centered. But an Ethiopia-Egypt confrontation that spills into the Somali coast would land in the same waters Somaliland is trying to secure a voice in.*

15 Regional Context: The 2026 Iran War

Several of the developments above trace back to a single regional shock: the US–Israel war with Iran that began in 2026, which drove the Iron Dome deployment to the UAE (Section 3), disrupted Gulf shipping through the Strait of Hormuz, and forms the backdrop both the Mecca Defence Alliance and the UAE's OPEC exit explicitly cite as context.^{8,30} GSI does not treat the war itself as in scope for this briefing, which remains focused on the Horn of Africa, but flags it as the common cause behind several otherwise-disconnected data points elsewhere in this document.

16 AUSSOM's Funding Cliff and the Onshore Vacuum

The maritime and diplomatic contest documented above is unfolding as the mission underpinning Somalia's onshore security position moves toward a funding crisis. On 1 July 2026, the United States notified the African Union it would not support the UN Support Office in Somalia (UNSOS) — which provides fuel, transport, medical evacuation, and other logistics to the African Union Support and Stabilization Mission in Somalia (AUSSOM) — beyond 31 December 2026. Washington said it would not block a UN Security Council renewal of AUSSOM's mandate, but would oppose any renewal that included continued UNSOS logistical support, citing Somalia's failure to sufficiently reduce its dependence on foreign forces after nearly two decades of assistance.³³ The AU's Peace Support Operations Division has said the \$502 million UNSOS logistics package is currently the only assured funding, after Washington's roughly 25 percent contribution was withdrawn in October

2025; AUSSOM's own 2025 budget of \$196 million was itself only about a quarter funded by pledges.⁴⁸

The drawdown is already visible on the ground. On 8 August 2026, Ethiopian AUSSOM troops withdrew from **Burhakaba**, a Bay region town on the Mogadishu–Baidoa road that is encircled by Al-Shabaab, handing over the forward operating base they had held since 2014 to the Somali National Army's 60th Division. Local reporting indicates further handovers of Ethiopian-held positions in Bay and Bakool are expected in the coming weeks, and Somali officials have publicly questioned whether national forces can hold the line alone.³⁷

GSI ASSESSMENT

This is the onshore counterpart to everything else in this briefing, and GSI judges it belongs alongside the maritime story rather than in a separate report. Every actor examined in Parts I–IV — Türkiye's naval and spaceport footprint, Saudi Arabia's coalitions, the proposed 26th Division, Egypt's coastal diplomacy — is being built against a backdrop of *a weakening, not strengthening, federal security backbone*. A Somali National Army stretched thinner by AUSSOM's contraction is simultaneously the force Mogadishu wants to extend into the Northeast (Section 9) and the force meant to hold towns being vacated by a twelve-year Ethiopian presence. Reporting on Al-Shabaab–Houthi contact and possible arms trading, while not independently confirmed in detail, adds a further reason this matters directly for Berbera and the Gulf of Aden coastline: a resourcing vacuum onshore does not stay onshore.³⁸ GSI recommends this be tracked as a single risk register alongside the early-warning indicators in Recommendation 1, not as a separate Somalia-generic development.

17 Pakistan's Quiet Entry into the Somalia Relationship

Islamabad is emerging as a fourth external security actor in Somalia, distinct from and running in parallel with the Mecca framework. On 4 August 2026 — three days before the Mecca signing — Somalia's Defense Minister, Ambassador Ahmed Moallim Fiqi, and Pakistan's Defense Minister, Khawaja Muhammad Asif, signed a bilateral defense-cooperation memorandum of understanding in Islamabad covering counter-terrorism, military training, exchange of expertise, defense capacity building, and broader security collaboration. On 6 August, Fiqi's delegation met Field Marshal Syed Asim Munir, Pakistan's Chief of Army Staff and Chief of Defense Forces, as well as the air force and naval chiefs, at General Headquarters in Rawalpindi; both sides emphasized deeper military-to-

military ties and capacity building.⁴⁴ No base, port access, or combat deployment has been announced.⁴⁴ India's foreign ministry, which has patrolled off Somalia since 2008, said on 7 August it was "following developments closely."⁴⁴

GSI ASSESSMENT

The timing is the point, not the content. A bilateral Pakistan–Somalia defense MoU signed days before Pakistan co-founded a trilateral pact that also touches Somalia's security environment, gives Mogadishu a fourth independent channel — alongside Türkiye, Saudi Arabia, and now a Riyadh-based Mecca secretariat with a Pakistani secretary-general — through which capability can arrive. GSI has seen no public evidence the Islamabad MoU was coordinated as part of Mecca planning, and the two tracks should be reported separately until evidence says otherwise. But the practical effect for Somaliland is the same either way: another state with no history in the Horn is now a named, official security partner of Mogadishu, widening the base of external actors Hargeisa would need to engage, not narrow, its own diplomacy against.

18 Piracy's Return: A Third Security Layer in the Gulf of Aden

The Lutuf was not an isolated event. The International Maritime Organization said on 24 August that six merchant vessels and more than ninety seafarers were being held captive in the Western Indian Ocean and Gulf of Aden, including the MT Honor 25, Sward, MV Eureka, and MT Asana, and called for urgent action.⁴⁵ This is the specific resurgence that produced the DCoC task-force proposal described in Section 8, and it is now a distinct security layer from either the Mecca framework or the chokepoint disruption at Hormuz and Bab el-Mandeb: armed non-state actors intercepting commercial shipping close to the Somali and Somaliland coastline, largely independent of which government or alliance controls the surrounding waters on paper.

GSI ASSESSMENT

Piracy's return changes the operational stakes of every jurisdictional question raised elsewhere in this briefing. A coastguard or naval force that can credibly deter and respond to hijackings has an immediate, non-ideological case for a seat in regional coordination, which is precisely the kind of functional relevance Recommendations 2 and 3 are designed to build. Somaliland's maritime security doctrine should treat counter-piracy capability as its most persuasive near-term argument for inclusion, separate from and faster-moving than the recognition debate.

19 Economic Transmission: How Red Sea Disruption Reaches Somaliland Households

Persistent disruption at both Hormuz and Bab el-Mandeb is not only a shipping-industry or foreign-ministry story. Reuters reported at the end of August that Asian diesel exports to Africa surged as Middle Eastern supply was disrupted — a direct illustration of how maritime chokepoint stress moves into fuel markets.⁴⁶ Separately, Reuters reported on 10 August that Maersk and Hapag-Lloyd were cautiously adding limited Suez/Red Sea services even as other carriers continued to price in elevated war risk, underscoring that any normalisation remains partial and reversible rather than a return to pre-2024 conditions.⁴⁶ Bab el-Mandeb transits overall remained at roughly half pre-attack levels as of an April 2026 IMF estimate.⁴⁷ For an import-dependent economy, higher freight, fuel, and insurance costs move quickly into transport costs, food prices, and public discontent — before they ever appear as a headline about warships or coalitions.

GSI ASSESSMENT

Red Sea geopolitics will reach Somaliland citizens mainly through prices before it reaches them through security incidents. GSI recommends treating fuel resilience, emergency stocks, alternative suppliers, and corridor-continuity planning as a standing line item alongside the security recommendations below, not as a separate economic-policy question — see Recommendation 12.

PART VI

Assessment and Response

20 What Is Actually Emerging?

No single development proves the existence of an anti-Somaliland military coalition. A Turkish warship, a Saudi defense agreement, an SNA division, a trilateral treaty, and a possible coastal facility are individually explainable. Their significance lies in potential convergence – in a sequence where each step makes the next one easier: diplomatic isolation creates space for military partnership; military partnership creates infrastructure; infrastructure creates a rationale for kinetic protection; kinetic protection, once demonstrated once, becomes a precedent for the next contested coastline. The early stages of that sequence are documented; the later ones rest on confidential reporting and remain unverified.

The principal danger is therefore *incremental strategic encirclement rather than immediate conventional confrontation*. Mogadishu could gradually create political, military, and maritime facts that change the balance around Somaliland without crossing the threshold into open war. The same process could narrow Puntland's autonomous security space and deepen Gulf competition inside Somali political disputes.

What August 2026 supplied was the missing external scaffolding. A collective-defence framework now exists that can fund and coordinate the later stages of that sequence; two maritime coalitions now exist that give it multilateral legitimacy; a coastal strike has demonstrated that the final stage – kinetic protection of federal logistics – is already operational, whatever the attribution; and a fraying AUSSOM backbone means the federal side building this architecture is, at the same time, thinner on the ground than at any point in over a decade.

Somaliland's Assets, Precisely

Parts I–V make the case in detail; this table is the summary GSI uses in internal briefings.

Asset	Value	Limitation	Policy use
Berbera port & corridor	Alternative logistics node near Bab el-Mandeb, gaining structural value as Hormuz/Bab el-Mandeb stay disrupted	Commercial importance does not by itself buy security-architecture inclusion	Tie port value explicitly to maritime-domain awareness, coastguard capacity, and corridor reliability (Rec. 2, 3)

Asset	Value	Limitation	Policy use
UAE relationship	Investment, port operations, technology and intelligence access	Abu Dhabi's interests are wider than Somaliland, and it is itself now estranged from Riyadh (Section 13)	Institutionalise quarterly strategic dialogue, not just project-level contact (Rec. 5)
Israel recognition	First-mover diplomatic breakthrough, technology and security-cooperation access	Not a defence guarantee; does not imply US policy will follow (Section 4)	Use for capability and access; keep public signalling calibrated (Rec. 6)
Ethiopia linkage	Large hinterland market and structural sea-access demand	Addis Ababa is balancing several regional pressures simultaneously, including Egypt	Shift the relationship from recognition politics to measurable corridor performance (Rec. 8)
US engagement	Congressional interest; AFRICOM contact; practical security and economic cooperation	June 2026 State Department report retains a Somalia territorial-integrity framework that limits how far ties can advance	Build functional cooperation that does not require recognition as a precondition first (Rec. 7)

Scenario Watch (GSI Analytical Judgment)

The bands below are structured judgements, not statistical certainties or claims of secret knowledge – they reflect the evidence available as of 1 September 2026 and should be revised as new indicators appear. They replace the three-scenario framing GSI used in its 29 August draft with a more granular, indicator-based approach that better supports the recommendations that follow.

Forecast	Likelihood	Why this is the base case	Key indicators
Mecca Defence Alliance deepens through exercises, doctrine and defence-industry projects	Very likely (75–90%)	A permanent secretariat, strategic committee and joint-production mandate were already agreed by 31 August.	Secretariat staffing; exercise calendar; joint procurement or technology announcements; air-defence or unmanned-systems projects.

Forecast	Likelihood	Why this is the base case	Key indicators
Somalia receives more support from all three Mecca members, mostly bilateral rather than a branded alliance mission	Very likely (70–85%)	Türkiye, Saudi Arabia and Pakistan each already have active or expanding bilateral defence relationships with Mogadishu.	Pakistani training teams; Saudi grants or equipment; Turkish naval training; coordinated senior visits.
The Multinational Maritime Defense Alliance becomes the main platform for Red Sea/Gulf of Aden coordination	Likely (60–75%)	It already has Saudi command, headquarters, an appointed commander, founding members, and a defined area covering Bab el-Mandeb, the Red Sea and the Gulf of Aden.	Combined operations-centre activity; intelligence protocols; patrol or escort plans; further accessions (Egypt, Bangladesh flagged).
Federal security integration around Las Anod / North Eastern State deepens	Likely (55–70%)	Political and administrative integration is already visible; military institutionalisation would be a logical next step for Mogadishu.	Gazetted SNA appointments; biometric registration/payroll; federal equipment deliveries; formal security MoUs with the Northeast.
A Turkish-supported logistics, surveillance or naval-access arrangement emerges around Lasqoray or the eastern Gulf of Aden coast	Even chance (40–55%)	RUSI commentary and GSI's own confidential sources point the same direction, but control, logistics and political risk remain real constraints.	Land allocation; construction; Turkish survey or engineering teams; protected supply routes; repeated naval calls nearby.
Egypt or another regional state begins a formal accession process to the Mecca or maritime alliance	Possible (30–45%)	Ankara has said an expansion roadmap is being prepared, naming Egypt as a candidate; Egypt already sits inside the Saudi-led maritime coalition.	Formal consultations; parliamentary or legal steps; observer participation; joint exercises under Mecca branding.
Direct conventional confrontation between Somaliland and Mecca-member forces	Unlikely (10–20%)	The architecture is oriented toward deterrence and regional security; members have strong incentives to avoid opening a new front.	Permanent foreign combat deployments near contested lines; explicit defence commitments to the Northeast; coercive exclusion of Berbera; sustained force mobilisation.

Confidence is highest for institutionalisation and bilateral support, and materially lower for Lasqoray, external financing of a 26th Division, or alliance expansion — those require continued indicator-based collection, not narrative repetition.

Policy Recommendations

1

Establish a Red Sea Strategic Early-Warning Cell

Integrate intelligence on Las Anod, Lasqoray, SNA recruitment, Turkish naval movements, construction at Warsheikh, payroll activity, external financing, and senior military visits. Add three new streams: implementation activity under the Mecca Defence Alliance, the operating patterns of the two maritime coalitions, and the AUSSOM/UNSOS funding trajectory and associated troop handovers described in Section 16. Indicators should be assessed collectively, not as disconnected incidents.

2

Adopt a Somaliland Maritime Security Doctrine

Define maritime interests, coastguard development, maritime-domain awareness, fisheries protection, Berbera security, critical infrastructure protection, and protocols for interaction with foreign naval forces. The doctrine should state Somaliland's position on foreign kinetic operations in and above its claimed waters.

3

Seek functional participation in the emerging maritime coalitions

Membership requires statehood; participation does not. Pursue observer, technical, or liaison arrangements through the Djibouti Code of Conduct framework, bilateral coastguard cooperation with member states including Djibouti and Saudi Arabia, and commercial-security channels tied to Berbera's port operator. The objective is to be inside the information flow before procedures harden.

4

Establish expectations for foreign kinetic activity off the Somaliland coast

The Lutuf strikes set a precedent that Somaliland should not encounter for the first time in its own waters, and its unresolved, disputed resolution (Section 6) makes this more urgent, not less. Publish a clear position on notification, deconfliction, and civilian protection; communicate it privately to every navy operating in the Gulf of Aden; and prepare an evidentiary and communications capability to respond credibly to any incident.

5

Upgrade Somaliland–UAE strategic consultation

Move beyond project-level engagement toward regular dialogue on Gulf of Aden security, port resilience, maritime surveillance, intelligence assessment, and protection of commercial infrastructure. Abu Dhabi's exclusion from both the Mecca pact and the Saudi-led coalition — and its deepening rupture with Riyadh documented in Section 13 — makes it more receptive to structured coordination, not less. The purpose should be deterrence and stability, not proxy confrontation.

6

Open a dedicated Saudi engagement track

Separate Riyadh's support for Somalia's territorial integrity from areas where interests can still converge. Somaliland should emphasize livestock supply, food security, investment, stability at Bab el-Mandeb, and Berbera's role in regional trade. Riyadh now anchors the trilateral pact, the Red Sea coalition, and Somaliland's largest export market simultaneously — which makes this the single highest-leverage diplomatic track available.

7

Consolidate Israel's recognition without strategic overdependence

Use the relationship to expand diplomatic access, technology, security cooperation, and investment, while avoiding an external posture that makes Somaliland appear exclusively embedded in an Israel–UAE camp. Treat Israeli capability as access rather than as a guarantee, and do not build plans that assume it converts into American policy.

8

Rebuild the Washington track around the June 2026 report

Contest the “region of Somalia” classification on its own terms rather than through recognition advocacy alone. Work the congressional channel that produced the Somaliland Partnership Act, document the operational costs of routing security cooperation through Mogadishu, and offer cooperation formats — maritime domain awareness, counter-piracy, port security — that do not require the executive branch to change its legal position first.

9

Coordinate discreetly with Puntland where interests overlap

Although relations between the two sides have improved over the last year, both Hargeisa and Garowe are interested in understanding federal military expansion, maritime developments, and the implications of external security competition. The Lutf strikes have given them a shared and immediate concern about unaccountable force on their coastlines. Limited deconfliction and information exchange could reduce strategic surprise.

10

Track the AUSSOM transition as a direct Somaliland-relevant risk, not a Mogadishu-only problem

Monitor the UNSOS funding decision through December 2026, the pace of further Ethiopian and other AUSSOM handovers in Bay, Bakool, and beyond, and any indication of Al-Shabaab exploiting the resulting gaps. A federal security vacuum changes both the risk environment along the Gulf of Aden coastline and Mogadishu's calculus for how quickly it needs external partners — including, potentially, partners currently engaged with Hargeisa.

11

Open a quiet Pakistan track

Islamabad's rapidly expanding bilateral military relationship with Somalia (Section 17) is now strategically relevant in its own right, independent of the Mecca framework. Establish a discreet channel focused on counter-piracy cooperation, professional military education, and maritime safety, mirroring the functional, non-recognition-conditioned approach recommended for Saudi Arabia and the DCoC framework. The objective is to reduce automatic alignment against Somaliland among Mogadishu's newest partners, not to seek recognition from Islamabad.

12

Build an economic-shock dashboard

Track fuel prices, insurance premiums, shipping times, livestock export access, food import costs, and corridor bottlenecks (Section 19). Red Sea geopolitics will reach Somaliland citizens mainly through prices before it reaches them through warships or coalitions, and a standing dashboard lets the coordination cell in Recommendation 1 flag economic transmission alongside security indicators rather than treating them as separate problems.

GSI September Watchlist

Eleven items GSI is tracking for the next edition, in addition to the verification indicators in Table 1:

1. Mecca Defence Alliance secretariat staffing, committee decisions, exercise announcements, new accessions, and any reference to Somalia, the Horn of Africa, or the Red Sea in implementation documents.
2. Pakistan–Somalia implementation: training teams, naval or air-force cooperation, equipment transfers, defence-attaché activity, or repeat high-level visits.
3. The Combined DCoC Task Force's Working Group 3 outcome from the 7–9 September Mombasa workshop, including mandate, funding, and sea-rider arrangements.

4. Further Turkish naval deployments, exercises, or logistics activity linked to Somalia.
5. Any official SNA announcement on the proposed 26th Division, command postings, or payroll integration in the Northeast.
6. Construction, land allocation, security deployments, or foreign technical teams around Lasqoray and the adjacent coast.
7. Further piracy incidents, hostage releases, and any authoritative resolution of the competing Lutuf accounts.
8. Commercial shipping decisions on Suez/Red Sea resumption and changes in war-risk insurance pricing.
9. Saudi-UAE relations, and whether Red Sea security cooperation produces pragmatic convergence or sharper competition.
10. US congressional or executive actions affecting Somaliland security, trade, or diplomatic engagement.
11. Ethiopia's maritime-domain strategy, including practical Berbera utilisation and its own DCoC engagement.

Strategic Bottom Line

Somaliland's strategic challenge is no longer limited to Mogadishu's diplomatic campaign against recognition. Somalia is gradually acquiring stronger military, financial, and maritime partnerships capable of translating diplomatic claims into institutional capacity, even as the AUSSOM mission underpinning its onshore security enters a genuine funding crisis and piracy re-establishes itself as a third security layer. Türkiye remains the most operationally advanced security actor in that process. Saudi Arabia adds political, economic, and defense weight, and now anchors both an institutionalised collective-defence alliance with its own secretariat and a maritime alliance with its own commander — while its rupture with the UAE, documented in this edition, reshapes the calculus for Somaliland's own Emirati partnership. Pakistan has quietly become a fourth channel. Las Anod could provide a potential territorial platform, while Lasqoray could become the critical maritime connection — both, GSI stresses, remain unverified rather than confirmed.

The appropriate response is neither alarmism nor automatic counter-alignment. It is to prevent strategic surprises. Somaliland should combine diplomatic diversification, intelligence monitoring, maritime capability, economic resilience, and deeper strategic coordination with the UAE and Israel while maintaining channels with Saudi Arabia and, increasingly, Pakistan. The objective should be simple: the emerging Red Sea security architecture must not be allowed to develop around Somaliland while excluding Somaliland from shaping it.

That objective is now measurably harder than it was three months ago. Two coalitions have formed without Somaliland and one of them now has a permanent secretariat and a fourth prospective partner state; Washington has placed its security relationship behind Mogadishu's consent; and the federal security mission that would need to hold any onshore facts Mogadishu creates is entering a funding cliff of its own even as piracy returns to its coastline. None of this is irreversible, but none of it will be reversed by advocacy alone. It requires Somaliland to become operationally useful to the actors building the new architecture — quickly, and on terms that do not wait for recognition.

GSI KEY MESSAGE

Somaliland's geography remains a major strategic asset. The task is to establish durable relationships with several important powers along the Berbera and Gulf of Aden coastlines, rather than allowing regional polarisation — or an unraveling federal security backbone next door — to turn geography into a vulnerability.

References and Source Notes

1. Saudi Press Agency (SPA), *Saudi Arabia's statement supporting Somalia's sovereignty and rejecting Israel's recognition of Somaliland*, 27 December 2025.
2. Federal Republic of Somalia, Ministry of Foreign Affairs, *Announcement terminating agreements with the UAE*, 12 January 2026.
3. Al Jazeera, "Türkiye, Saudi Arabia, Pakistan sign joint defence agreement: What's in it?", 7 August 2026.
4. Atlantic Council, "Why Saudi Arabia, Pakistan, and Turkey just signed a defense pact", August 2026.
5. Alhurra, "Egypt Left Out of Mecca Defense Pact Despite Role in Four-Nation Talks", August 2026.
6. Middle East Eye, "Saudi defence pact with Turkey and Pakistan sparks UAE backlash", August 2026.
7. Middle East Eye, "Why the Mecca Agreement has given the UAE–Israel alliance the jitters", August 2026.
8. Calcalist (CTech), "Iron Beam and Iron Dome at the frontlines of a quiet Israel–UAE alliance", 2026, reporting Financial Times and Axios material.
9. Axios, "Israel sent Iron Dome system and troops to UAE for Iran defense", 26 April 2026; The Times of Israel, "In first official confirmation, US envoy says Israel sent Iron Dome to UAE", 2026.
10. United States Department of State, report to Congress under the Somaliland Partnership Act (FY2023 NDAA), *Potential Areas for Improved United States Engagement with Somaliland*, June 2026; analysis in Middle East Forum, "The State Department Just Handed Turkey the Horn of Africa", and Horn Diplomat / Somaliland Chronicle, June 2026.
11. Somali government and Turkish official reporting on the 2024 Türkiye–Somalia Defence and Economic Cooperation Framework Agreement and naval capacity-building.
12. Türkiye Ministry of National Defence reporting, carried by Anadolu Agency, on the TCG Kemalreis and TCG Yzb. Güngör Durmuş deployment and visit to Djibouti in support of the Somali Naval Task Group, August 2026.
13. Associated Press, reporting on the August 2026 hijacking of M/V LUTUF off Puntland and subsequent maritime-security developments; Hiiraan Online and Garowe Online coverage, 18–27 August 2026.
14. Le Monde, reporting on the Warsheikh space and missile-test facility, July 2026; Sputnik Africa, "Turkey to Build \$350 Million Space Launch Base on Somalia's Coast: Reports", 3 July 2026; see also The Jerusalem Post and The Cradle, July 2026.
15. Somali Guardian, "Puntland condemns reported Turkish airstrike that killed 4 civilian fishermen in Garmaal", 22 August 2026; Hiiraan Online, "At least nine people killed in airstrike near pirate-held vessel off Puntland coast", 24 August 2026.
16. WardheerNews, "Puntland Accuses Turkey of Airstrikes Along Its Coast", 27 August 2026; Hiiraan Online and Somalia Today, 27 August 2026.
17. Garowe Online, "Türkiye Stops Short of Denying Deadly Puntland Coastal Strikes in Response to BBC", August 2026.
18. Saudi Press Agency, *Saudi Arabia–Somalia Security Cooperation Agreement*, 12 November 2023.
19. Anadolu Agency and Somali official reporting, *Saudi Arabia–Somalia military cooperation agreement*, 9 February 2026.
20. Saudi Press Agency and Somali official reporting, *Saudi Arabia–Somalia maritime cooperation agreement*, 19 February 2026.

21. UN COMTRADE bilateral trade data for Saudi Arabia–Somalia, 2025, as compiled by Trading Economics (accessed August 2026). Live animals: US\$325.91 million of US\$336.82 million in total Saudi imports from Somalia; live sheep and goats: US\$255.17 million.
22. Confidential Somali defence and security reporting, August 2026: proposed SNA 26th Division; force registration; command arrangements; anticipated senior SNA visit; reported Turkish initial payroll support; prospective Saudi- and Pakistan-linked financing. Not independently verified and not for public attribution.
23. AGBI, “Saudi Arabia launches 14-nation coalition to secure Red Sea routes”, 31 July 2026; Al Jazeera, “Why is Saudi Arabia forming a coalition to protect the Red Sea?”, 30 July 2026. Superseded in part by ref. 36 below on the coalition’s formal name and status.
24. Euronews, “Houthis vow ‘full escalation’ as Saudi Arabia launches Red Sea coalition”, 31 July 2026.
25. International Maritime Organization, reporting on Indian Ocean and Gulf of Aden states’ coordinated maritime–security action, August 2026; Dawan Africa, “19 Countries Back Plan for New Anti-Piracy Task Force in Indian Ocean”, 18 August 2026. See ref. 43 below for the corrected, more precise task–force status.
26. Royal United Services Institute (RUSI), 2026 strategic commentary discussing Türkiye, Somalia, and emerging Red Sea competition, including reported interest around Lasqoray.
27. Wikipedia, “Mecca Defense Alliance”; Arab Center Washington DC, “Diversification Without Substitution: What the Mecca Joint Defense Agreement Offers Saudi Arabia”, 19 August 2026; Al Jazeera, “What are Saudi Arabia, Türkiye and Pakistan’s joint military capabilities?”, 11 August 2026.
28. Al Jazeera, “Pakistan, Saudi Arabia, Türkiye meet: What’s next for their defence pact?”, 31 August 2026 (naming of the Mecca Defence Alliance following the Istanbul meeting of the Strategic Political and Defence Committee).
29. Al Jazeera, “Saudi Arabia bombs Yemen port over separatist weapons shipment” and “Arab Coalition announces ‘limited’ airstrike”, 30 December 2025; The Washington Post and Middle East Eye, “Yemen war: Mukalla strike shows Saudi Arabia has run out of patience with Abu Dhabi”, 30–31 December 2025; Wikipedia, “2025–2026 Southern Yemen campaign”.
30. Al Jazeera, “UAE leaves OPEC in blow to oil cartel during war on Iran” and “What are OPEC and OPEC+, and why has the UAE quit?”, 28 April 2026; Khaleej Times, Enerdata, The Conversation, Middle East Council on Global Affairs (“The UAE’s Exit from OPEC: When Politics and Oil Mix”, 17 June 2026), and Arab Center Washington DC, April–June 2026.
31. Daily News Egypt, Egyptian State Information Service, and Horn Review, “Egypt, Eritrea Sign Maritime Transport Pact”, 16–17 May 2026; The Media Line, 19 May 2026.
32. Eastleigh Voice, Addis Standard, and Horn Review, “Somalia approves maritime cooperation deal with Egypt as Cairo expands Red Sea port partnerships” and “The Egypt–Somalia Maritime Memorandum of Understanding”, 9–14 July 2026.
33. ISS Africa, “Rethinking the AU’s Somalia peace mission after US funding cuts”, 29 July 2026; The East African, “US funding exit casts doubt on AU peace mission in Somalia” and “Somalia’s peace mission faces collapse as US funding dries up”, July 2026; Standard Media (Kenya), 2 July 2026.
34. Somaliguadian, “African Union questions future of Somalia peace mission as AUSSOM funding crisis deepens”, July 2026.

35. Somaliguards, Hiiraan Online, Raxanreeb, Garowe Online, and Ethiopia Today, "Ethiopia withdraws troops from militant-encircled Burhakaba", 10–14 August 2026; Horn Review, "Ethiopia's Withdrawal from Burhakaba and What Comes Next for Al-Shabaab?", 14 August 2026.
36. The Arab Weekly, "Mecca defence alliance takes first steps towards strategic permanence"; Al Jazeera, "Pakistan, Saudi Arabia, Türkiye meet: What's next for their defence pact?"; Dawn and Siasat, "Makkah Defence Alliance to be institutionalised, Pakistan to head secretariat for 3 years: FO"; The Express Tribune, "Riyadh to host Makkah alliance secretariat" — all 31 August–1 September 2026, on the Istanbul Strategic Political and Defence Committee meeting, named officials, and the permanent Riyadh secretariat.
37. Saudi Press Agency, "HRH the Crown Prince, Turkish President Discuss Red Sea Security; Erdoğan Welcomes Saudi-Led Maritime Coalition", 3 August 2026.
38. Saudi Press Agency, Saudi Ministry of Defense announcement appointing Rear Admiral Abdullah bin Salem Al-Shehri commander of the Multinational Maritime Defense Alliance, 6 August 2026; Saudi Press Agency, "Ministry of Defense Hosts International Meeting on Saudi Initiative to Establish Multinational Maritime Defense Alliance", 30 July 2026; Al Jazeera, "Saudi Arabia announces start of Red Sea defence alliance: Will it work?", 14 August 2026.
39. Al Jazeera, "Which other countries could join the Türkiye-Saudi-Pakistan defence pact?", 9 August 2026, and 31 August 2026 Istanbul press remarks by Turkish Foreign Minister Hakan Fidan on a prospective accession roadmap, reportedly including Egypt and Bangladesh.
40. Africa Ports & Ships (DefenceWeb), "Türkiye-Somali forces free hijacked LUTUF as Somali piracy resurgence continues", 31 August 2026; Associated Press / WTOP, "Turkish vessel freed after seizure by pirates, Somali officials say", 30 August 2026; Newsy, "Turkish and Somali Forces Rescue Hijacked Vessel in Somalia", 30 August 2026 — Somalia's Ministry of Defence account of a 10-day joint operation, 14 pirates killed, four boats destroyed.
41. Hiiraan Online, "Puntland state accuses Somalia, Türkiye of paying pirates after MV LUTUF freed", 30 August 2026 — Puntland Ministry of Security and DDR statement rejecting the joint-operation account and alleging a ransom payment.
42. Rio Times Online (Africa Intelligence), "Turkish Arms Ship Freed Off Somalia as Rescue Accounts Clash", 30–31 August 2026; Ismail Warsame, "OpEd: Freed Ship, Fractured Story — Mogadishu and Puntland Give Conflicting Accounts of the MV Lutuf's Release", 30 August 2026.
43. PortNews, "Djibouti Code states back joint anti-piracy force", 18 August 2026; MarineLink / Safety4Sea / AllAboutShipping, "DCOC States Agree on Combined Anti-Piracy Task Force", 17–19 August 2026; Dawan Africa, "19 Countries Back Plan for New Anti-Piracy Task Force in Indian Ocean", 18 August 2026 — confirming the DCoC Steering Committee's 29 July recommendation, National Focal Points' 5 August endorsement tasking Working Group 3, and the 7–9 September Mombasa workshop; the task force was not yet operational as of 1 September 2026.
44. Inter-Services Public Relations (Pakistan), readouts of the 6 August 2026 meeting between Somalia's Defence Minister Ahmed Moallim Fiqi and Field Marshal Syed Asim Munir, carried by Daily Times, Daily Pakistan, Garowe Online, Minute Mirror and The Nation; Rio Times Online (Africa Intelligence), "Pakistan Signs a Defence Deal With Somalia", 25 August 2026, on the 4 August Islamabad MoU and India's 7 August response.
45. International Maritime Organization, "IMO calls for urgent action as piracy resumes in the Gulf of Aden", 24 August 2026; Safety4Sea, "DCoC states back regional task force to tackle piracy resurgence", naming MT Honour 25, Sward, MV Eureka and MT Asana among vessels held.

46. Reuters, "Maersk, Hapag-Lloyd resume more sailings through the Suez Canal", 10 August 2026; Reuters, "Asia's diesel exports to Africa jump in August, replace Mideast supply, data shows", 31 August 2026; Reuters, "Pipelines and ports: Iran war spurs Gulf infrastructure investment", 28 August 2026.
47. International Monetary Fund, "Global Disruptions Are Testing How the World Moves Goods and People", 29 April 2026 (Bab el-Mandeb transits estimated at roughly half pre-attack levels).
48. Rio Times Online (Africa Intelligence), "Somalia Faces Early Troop Exit Rethink As US Funding Cut Hits AU Mission", August 2026 (AUSSOM 2025 budget of \$196 million, pledges covering roughly a quarter, and the \$502 million UNSOS logistics package).

METHODOLOGICAL NOTE

This briefing distinguishes verified open-source information from confidential security reporting and GSI analytical judgment. Its confidential element draws on Somali defence and security sources positioned close to the relevant institutional discussions; their identities and precise roles are withheld to protect them. Intelligence reporting is included because it may provide early warning of developments not yet visible in public sources, but uncorroborated claims are explicitly qualified. Where events remain unattributed — most notably the coastal air strikes described in Section 6 and the competing accounts of the Lutuf's release — this briefing reports them rather than resolving them. *This edition adds new Sections 13–19 and updates Sections 2, 6 and 8 of GSI's original 29 August analysis; it does not alter the wording of Parts I–IV's confidential-source sections (9–11). It was additionally cross-checked against a separate GSI working draft dated 31 August 2026, which is credited in the references where it supplied a lead GSI then independently verified; two factual corrections it flagged (Section 8's DCoC status) and one factual conflict it did not fully resolve (Section 6's Lutuf accounts) are addressed directly in the text. The assessment should be updated again as official announcements, deployments, financing arrangements, or construction activity provide additional evidence.*

About GSI

Gateway Strategic Insights (GSI) is a think-do tank focused on strategic analysis, foresight, and advisory work in the **Horn of Africa**. GSI helps decision-makers understand and navigate the region's complex political, security, geopolitical, and investment landscape, transforming data and developments into clear, actionable insight.

Our work combines deep research, locally grounded expertise, and forward-looking analysis. We bridge the gap between knowledge and action, delivering decision-ready intelligence that supports strategic planning, risk management, and informed investment.

Practice Area	Focus
Geopolitics, Governance & Regional Affairs	Political risk, state formation, and regional order in the Horn of Africa
Trade & Investment	Market entry, sector analysis, and investment climate assessment
Blue Economy & Maritime Affairs	Ports, shipping corridors, fisheries, and maritime security
Institutional Advisory	Strategy, capacity, and reform support for public institutions
Regional Integration & Strategic Connectivity	Corridors, infrastructure, and cross-border economic linkage
Due Diligence	Counterparty, transaction, and operating-environment verification

CONTACT

Gateway Strategic Insights · www.gsi.africa · info@gsi.africa. This briefing is provided for strategic assessment purposes. Confidential source reporting referenced herein is not for public attribution. For enquiries about this assessment or about commissioned analysis, contact GSI directly.



Beyond solutions, building trust.

www.gsi.africa

info@gsi.africa

Horn of Africa