
Lasting Tigray-Ethiopian government peace agreement unlikely

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Ethiopian government forces halted significant Tigray Defence Forces (TDF) advances in December, but the government's position is perilous. *Jordan Anderson, Bisrat Semere, and Nizar Manek* analyse three scenarios for how the Ethiopian conflict may develop.

Key points

- The Ethiopian civil conflict between pro-government forces and Tigray opposition groups began in 2020.
- The likelihood of ceasefire talks is increasing as battlefield ascendancy shifts between each side, but talks would likely break down during bad faith negotiations.
- *Janes* has also identified two scenarios with lower probabilities, including the government establishment of buffer zones in Tigray and the capture of Western Tigray by the Tigray Defence Forces.

UPDATED

The Ethiopian federal government announced on 23 December that its offensive operations against the Tigray Defence Forces (TDF) had been halted following an announcement by the TDF-aligned Government of Tigray (GoT) on 20 December that the TDF had withdrawn from Amhara and Afar regions. The move followed a counter-offensive by federal government forces in late November in response to a TPLF push that prompted a state of emergency in early November.

Ethiopia's civil war began with pre-emptive attacks by Tigray People's Liberation Front (TPLF)-aligned forces in Tigray against the Ethiopian National Defence Force's (ENDF) Northern Command on 3–4 November 2020. The TPLF had until then been Tigray's governing party, and the dominant wing of Ethiopia's ruling coalition until early 2018. The TDF was formed in 2020 as the military wing of the TPLF-dominated GoT.

In the three months preceding the civil war, as reported to *Janes* by an Eritrean opposition leader in Ethiopia in October 2020, nomads filtering into Eritrea through Ethiopia's Afar regional state and Port Sudan observed co-ordinated military training in Eritrea between the ENDF and the Eritrean Defence Forces (EDF). The sources additionally observed the installation of radar equipment in Agordat city in Eritrea's Gash-Barka region, which borders Tigray.

TDF attacks followed ENDF and EDF movements toward the Badme, Zalambessa, and Rama fronts at the Eritrea-Tigray border, Eritrean soldiers and militiamen supporting relevant Eritrean

mechanised and infantry divisions reported to *Janes* (in late 2020 and early 2021) both before and after returning to Eritrea.

By late November 2020, forces aligned with Ethiopia's Prime Minister Abiy Ahmed and Eritrean President Isaias Afewerki – the ENDF, EDF supported by the Eritrean Hizbawi Serawit militia (People's Army), and Amhara regional special forces and militias – had established nominal control over Tigray's cities, large towns, and major arterial roads. Foreign governments – including key donor partners such as the United States – increasingly began expressing concern over human rights abuses and the blocking of humanitarian aid by pro-government forces.

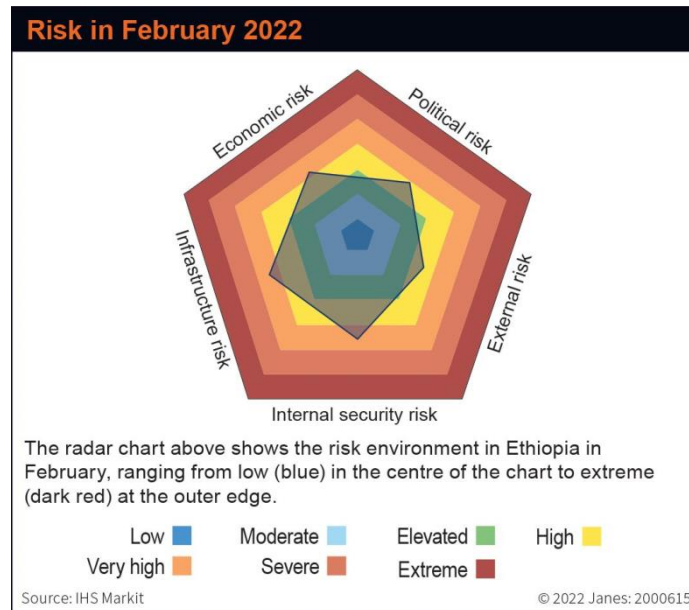
In response, Tigrayan defectors and veteran ENDF members, including former Chief of Staff Tsadkan Gebretensae, as well as tens of thousands of youth recruits, joined the Tigray opposition. This drove a growing insurgency, particularly in rural and mountainous areas of central Tigray, coalescing under the banner and command structure of the TDF, then with four sub-armies launching offensives from Qola-Tembien in early June 2020. The TDF inflicted battlefield defeats and significant casualties on pro-government forces, particularly the ENDF.

As part of a purported unilateral ceasefire in late June 2021, pro-government forces withdrew from Tigray, except for the Western Tigray zone. This area is claimed by Amhara region and is Tigray's only foreign border not with Eritrea (bordering Sudan). However, the Ethiopian government continued to limit the flow of humanitarian aid into Tigray, as well as largely cutting off telecommunications, power and fuel imports, and banking services.

The GoT cited its need to break this 'blockade' and launched TDF offensive operations into the neighbouring Amhara and Afar regions in July. However, as their forces advanced, the TDF and allied forces sought to push Prime Minister Abiy Ahmed out of office altogether. TDF troops advanced south and east from Dessie and Kombolcha, threatening the A1 highway through Mille, Afar - Ethiopia's main import-export corridor through Djibouti - to within approximately 170 km of the outskirts of Addis Ababa in late November. By mid-December, however, the TDF had withdrawn fully into Tigray in what it termed "territorial adjustments".

Five sources inside the TDF command structure and Afar regional administration told *Janes* in December 2021 that two key factors forced this retreat. First, an intensification of military unmanned aerial vehicle (UAV) strikes against the TDF's supply chains, logistics, and heavy weaponry. Second, government counter-offensives in Afar and the northern Amhara region threatened to cut off and encircle TDF troops further south. Senior Afar regional government sources also informed *Janes* in December 2021 that Eritrean mechanised forces had supported Afar regional forces in November in fighting the TDF, and continued to enter Afar.

Despite the significant losses of materiel amid the retreat and UAV strikes, these withdrawals helped to minimise losses in open-field battles, leaving the TDF with most of its fighting capacity intact, military advisers at Western embassies in Addis Ababa told *Janes*. TDF sources estimated to *Janes* in late December 2021 a claimed fighting force of 200,000 fighters. Multiple attendees of a Prime Minister's Office private cadre training session for officials in January 2022 told *Janes* that Abiy had then claimed that 25,000 TDF fighters are ex-ENDF soldiers.



Risk in February 2022 (Janes)

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Political risk (High, 3.1)

Abiy's Prosperity Party (PP) won an overwhelming majority in the 2021 House of Peoples' Representatives election, although several major opposition parties boycotted the polls because of restrictions that prevented them from meaningfully competing. The PP is heavily divided internally, with fault-lines particularly between the Amhara and Oromia factions of the party.

Abiy has increasingly positioned himself as the only individual capable of preventing a TPLF return to power, personally travelling to the front lines in late November to take command of pro-government forces.

Neither the TPLF – nor its ally the Oromo Liberation Army (OLA), which lacks even a unified command structure – has articulated a clear and credible outline for a future transitional government. Senior sources in the ENDF and Ethiopia's Ministry of Foreign Affairs told *Janes* in mid-December 2021 that advanced talks within the government over releasing some political prisoners could be geared at trying to undercut the OLA's alliance with the TPLF, but that this could further feed into the crisis in Oromia, including within the Oromia PP. To undercut the Amhara PP's role as a king maker within the PP, Abiy could seek to empower the Oromia, Sidama, SNNPR, Somali, Afar, Gambella, and Benishangul-Gumuz PPs.

External risk (High, 2.7)

Ethiopia's dispute with Egypt and Sudan over the Grand Ethiopian Renaissance Dam (GERD) and related Nile water-sharing issues continue to be aggravating factors in trilateral relations. There is a high-impact but low risk that the Sudan Armed Forces (SAF) could seek to capture part of Benishangul-Gumuz regional state in Ethiopia in which the GERD is situated – also the subject of a territorial dispute with Sudan – as well as to seize the fort of ENDF and EDF soldiers sealing off Tigray from Sudan.

Ethiopia's territorial dispute with Sudan over the Fashaga triangle (between northwest Amhara in Ethiopia and Sudan's Gedaref state) remains delicate. . Speaking with a *Janes* interlocutor in December, a senior Eritrean official said the EDF was training soldiers for a potential scenario of open military confrontation, alongside the ENDF, with the SAF and Egyptian Armed Forces as a pretext to supply the TDF. In late December 2021 and early January 2022, the TDF engaged in cross-border raids from Sudan near Humera (at the tripoint between Ethiopia, Eritrea, and Sudan) a TDF source told *Janes* , indicating a level of tacit Sudanese support for the TDF.

Border skirmishes of Sudanese forces against ENDF and Amhara militias are increasingly of concern to both governments, with control over crops during the annual November-December harvest a recurring aggravating factor. This risk is exacerbated as a consequence of ongoing food shortages in both countries.

Internal security risk (Very high, 3.6)

Ethiopia declared a nationwide six-month state of emergency on 2 November 2021 in response to the expanding conflict. The TDF's incursions into Amhara and Afar regions, and particularly their push into central Ethiopia in November, stoked fears of a TPLF return to power and led to several embassies evacuating personnel from Addis Ababa.

During 2021 the ENDF began to train mountaineering divisions, indicating that pro-government forces were preparing for potential offensive operations into the mountainous terrain of TDF-controlled Tigray.

Parallel armies have effectively emerged in Ethiopia's regional states. Amhara regional state is building independent capabilities, sending 30,000 new recruits to Eritrea for training since August 2021 without prior discussion or approval by Abiy, according to a *Janes* source in December.

When these recruits started to return from Eritrea in November 2021, they requested that the ENDF hand over weapons; when the ENDF refused, the recruits forcibly emptied these depots, leading to clashes between Amhara special forces and Oromo and Southerner ENDF regular units. Emboldened Afar special forces could in time turn their attention to Ethiopia's Somali regional state over disputed territory, engaging that region's own special forces.

Infrastructure risk (Very high, 3.7)

Ethiopia's domestic conflict has caused significant infrastructural damage, with the government and the TDF both accusing the other of engaging in deliberate sabotage, vandalism, and looting. Axum and Lalibela airports have particularly suffered damage – likely both as a result of heavy fighting and deliberate sabotage – and key bridges over the Tekezé and the Alweha rivers have been destroyed. A large fire at the Tekezé hydroelectric power station (in TDF-controlled territory) in November and concurrent power cuts in Tigray were blamed by the TDF on a government airstrike, which the government denied and claimed that a TDF attack was responsible.

The government has confirmed airstrikes against alleged TDF targets, including an industrial engineering site in Tigray's capital Mekelle. In late 2021 the government alleged TDF looting of hospitals, government buildings, and commercial sites in Amhara region.

Advisers to European and Asian diplomatic missions told *Janes* in November 2021 that in November a Turkish railroad construction company in Kombolcha was looted, likely in retaliation for Turkey providing military supplies to the ENDF. These procurements included satellite communication services, satellite imagery analysis, reconnaissance, and military service equipment, along with UAVs, tanks, and modern artillery, a senior government source told *Janes* in December 2021.

Economic risk (Very high, 3.3)

IHS Markit economists project Ethiopia's economic growth to be close to 2% in 2021 and 4% in 2022, with transportation and harvest disruptions because of the domestic conflict as well as weaker investment and industry production growth accounting for this. Moody's Investors Service cut Ethiopia's sovereign credit rating twice in 2021, on heightened external liquidity risks.

The US removed Ethiopia's African Growth and Opportunity Act (AGOA) qualification – which gave duty-free access to the US – on 1 January 2022, which will likely significantly hurt Ethiopia's exports and challenge government revenue growth. On the announcement of this planned removal in November 2021 announcement, Ethiopia's USD1 billion Eurobond maturing in 2024 hit a record low.

Annual average headline inflation remained elevated at 33% in November 2021, decreasing from 34.2% in October (the highest rate since April 2012), and will likely remain in double digits in the one-year outlook. In April 2021 only two bids were submitted from 11 pre-war expressions of interest for two licences in EthioTelecom, the centrepiece of Ethiopia's liberalisation drive and crucial in efforts to raise foreign currency. The 18–19 December Turkey-Africa summit yielded Abiy additional military supplies as well as a Turkish government credit facility to import strategic supplies, a senior government source told *Janes*.



Ethiopian Prime Minister Abiy Ahmed (first row, right) salutes members of the national defence forces during a parade in Ethiopia's capital Addis Ababa on 4 October 2021. Abiy has sought to take personal control of the conduct of the conflict with Tigray rebels. (Eduardo Soterias/AFP via Getty Images)

After Ethiopian government forces halted significant advances of the Tigray People's Liberation Front (TPLF) advances in December, *Janes* examines three scenarios for how the situation may develop ranging from bad-faith ceasefire talks, to the creation of a buffer zone in Tigray and the Tigray Defence Force (TDF) recapture of Western Tigray.

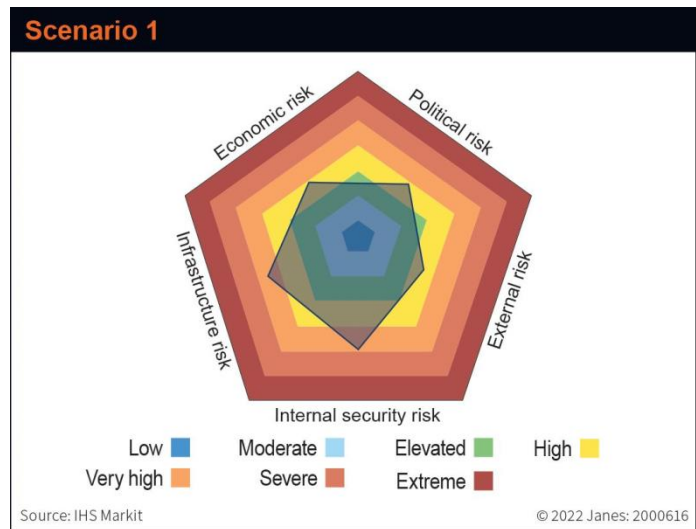
Scenario 1: Ceasefire talks begin but break down, resulting in renewed fighting

Probability: High

In this scenario, pro-government offensives would halt at the disputed Raya area of Southern Tigray, with the TDF having vacated Amhara and Afar regions, which the government had previously stated was the minimum requirement for commencing talks. The House of People's Representatives would then lift its designation of the TPLF as a terrorist organisation but some sanctions of TPLF leadership would continue.

Both sides would agree to enter ceasefire talks. The government would opt to support African Union (AU) mediation led by former Nigerian President Olusegun Obasanjo – described by a senior Ethiopian diplomat to *Janes* in December 2021 as being receptive to government interests.

The AU process would work from within the auspices of a government-led dialogue commission, through which the government would seek to dictate mediation terms and obstruct US-supported mediation efforts led by Kenyan President Uhuru Kenyatta. AU talks would help to relieve international pressure on the Ethiopian government, with the US delaying sanctions escalation.



Scenario 1 (Janes)

To buy more time, Abiy would propose a transitional arrangement for areas contested with Tigray, but this would rapidly break down through bad faith negotiations, including disagreements with the Amhara PP on control over the Western Tigray zone. Both sides would view talks as little more than a lull in fighting, as each side's 'primary threat' (the TDF's existence as a fighting force, or the continued Abiy government) remains unresolved.

The ENDF would use this time to further train new recruits, boosting its fighting capability. In particular, efforts would be made to replace Ethiopian losses of air force pilots and technical personnel (a pilot who defected from the ENDF Air Force told *Janes* in December that Ethiopia's Air Force had lost about 30% of its MiG-29 fighter jets), as well as operators for military UAVs.

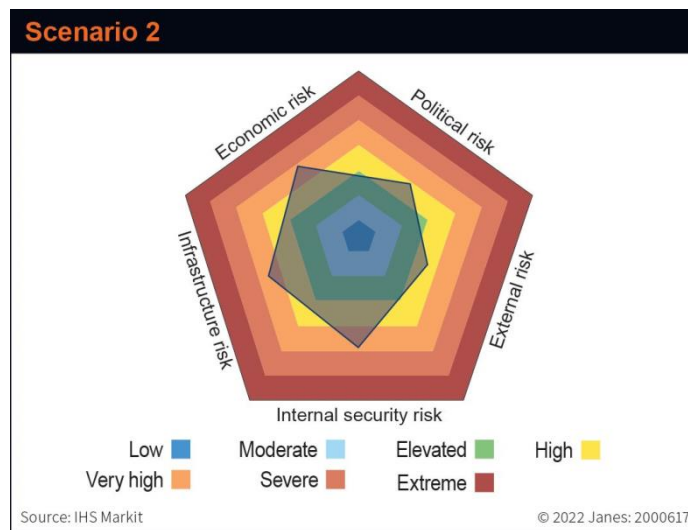
Consequently, both pro-government and TDF forces would be quick to seize any opportunity to launch new attacks that would deal their opponents a defeat, or, in the case of the TDF, yield significant new supplies.

Scenario 2: Pro-government forces create buffer zones inside Tigray

Probability: Moderate

In this scenario, pro-government forces, including the Eritrean military operating through Afar region, would pursue a retreating TDF into Tigray as the TDF was pushed into a defensive posture after its failure in November–December 2021 to bring the Dessie-Kombolcha route under its control. Pro-government forces would create a buffer zone in western, eastern, and southern Tigray, while using UAVs to degrade TDF capacity on the borders. This would result in TDF fighters retreating into mountainous terrain.

Senior sources within the Afar government told *Janes* in December 2021 that it had been observed that 4,000–5,000 new Afar special forces had been trained by the Eritrean military in Afar as part of a wider Eritrean training campaign and were about to graduate, armed with light to heavy weapons including DShK heavy machine guns. This training would enable them to participate in the pursuit of the TDF into Tigray.



Scenario 2 (Janes)

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Pro-government Ethiopian and Eritrean forces would invade from the north, east, and south to overwhelm the TDF. However, the TDF would continue to receive strong support from the local population, driven by previous and ongoing civilian casualties resulting from pro-government military operations.

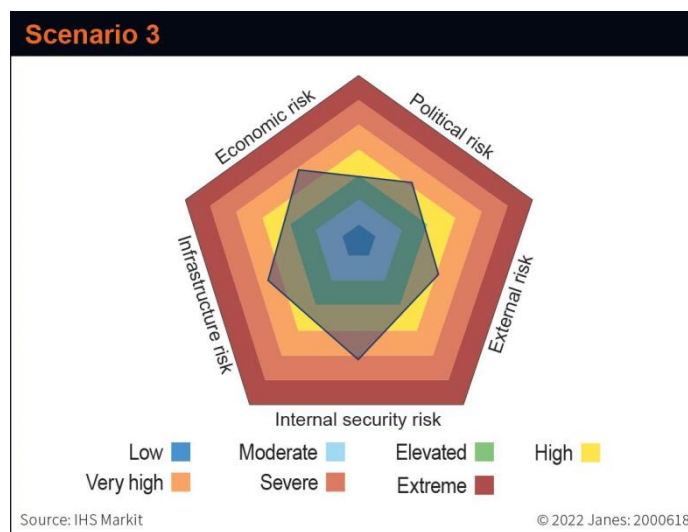
Both sides would persist in what multiple sources in both camps already described in November and December 2021 to *Janes* as growing strategies of attrition. Widespread airstrikes, targeted killings, and other human rights abuses targeting ethnic Tigrayans by the ENDF would prompt the US and EU to escalate sanctions against Ethiopia.

Consequently, the Ethiopian government would increasingly rely on China, Iran, Turkey, and the United Arab Emirates for assistance. The intensity of the conflict would continue to prevent the distribution of emergency food aid to Tigray, heightening famine conditions.

Scenario 3: TDF recaptures Western Tigray and pushes into Sudan

Probability: Low

This scenario would be triggered by an outbreak of fighting between ENDF troops and Amhara regional forces over control of heavy weaponry largely possessed by the ENDF but sought by Amhara forces. The TDF would perceive a breakout opportunity at a moment of critical pressure during bad faith peace talks. The TDF, which has established defensive lines in the south and has the mechanised units needed to engage in flat terrain, would launch offensive operations into the Western Tigray zone for the first time, aiming to push out pro-government forces and secure a route to the Sudan border for supplies, including critical anti-air assets.



Scenario 3 (Janes)

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The TDF would succeed in recapturing Western Tigray, but only due to a substantive sudden military intervention by the SAF, which would allege Ethiopian provocations in al-Fashaga as a pretext for its operations. These forces would be joined from across the Tekezé by Tigrayan defectors from ENDF peacekeeping missions and refugees trained in camps in Sudan. Eritrean military forces stationed in Western Tigray would withdraw to Amhara and Eritrea. The SAF would take full control of al-Fashaga, and Sudanese authorities would allow the TDF to establish a supply line into Sudan for food, fuel, and munitions.

Heightened ENDF-SAF clashes would follow, or the Ethiopian government would agree to delay its counter-attacks and engage in ceasefire talks with the GoT and Sudan, seeking to avoid further military escalation with Sudan and facing the difficult task of otherwise attempting to defeat a strengthened TDF. This scenario's low probability stems from the TDF being distracted and would require intervention by the SAF. The TDF's focus would be on the Eritrean and Afar borders, as senior sources within the Afar regional government described to *Janes* in mid-December 2021, as well as face UAV disruption to mechanised activity on flat terrain.

Conclusion

A PP executive committee source told *Janes* in December that in late November 2021 the PP executive committee had discussed the concept of negotiations for the first time. According to leaked internal government reports, in mid-December 2021 the PP held initial public consultations in parts of the country including Oromia and Sidama, where people were receptive to pursuing dialogue with the TDF and other actors.

PP fault lines are hardening and the likelihood of fracture will increase if the Oromia PP accepts the principle or preconditions to start negotiations and the Amhara PP rejects the preconditions. For its part, the GoT wrote a letter to United Nations Secretary-General António Guterres on 19 December saying that its withdrawal to Tigray from Afar and Amhara aligned with government preconditions to commence negotiations, stating: “We trust that our bold act will be a decisive opening for peace.”

On 23 December the Ethiopian government announced that the “first phase” of its military operations against the TDF had “ended with victory”, and that pro-government forces had been ordered not to advance deeper into Tigray “for now”. A senior ENDF officer told *Janes* in mid-December that there were mixed views within the military on its own capacity to eliminate the TDF and the TDF's capacity to regroup. Although the potential for opening talks is real, this will depend in large part on how battlefield dynamics unfold. Continued fighting – even if punctuated by lulls and bad-faith negotiations – is common to all three of the scenarios discussed above.

A comprehensive peace settlement that satisfies all the major parties to the conflict is unlikely to materialise in the coming months, as government objectives centre on dictating mediation terms from a position of power and continuing to seek TDF acquiescence. Both sides continue to pursue a military-led solution through attrition, and to draw out any negotiation processes to this end.

On the web

- Delayed Ethiopian poll likely to be disrupted by ongoing conflict
- Tigray separatists threaten Ethiopian government's political control

Author

Jordan Anderson is a senior analyst on the Africa desk at IHS Markit country risk. Nizar Manek is an independent analyst and consultant on Ethiopia and the Horn of Africa and Middle East. Bisrat Semere is the pseudonym of a local analyst and consultant specialising in the Tigray war. Additional research by Alisa Strobel, a Senior Economist at IHS Markit.