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Series Introduction

This China Maritime Report on Djibouti is the first in a series of case studies on China's "overseas strategic strongpoints" (海外战略支点). The strategic strongpoint concept has no formal definition, but is used by People's Republic of China (PRC) officials and analysts to describe foreign ports with special strategic and economic value that host terminals and commercial zones operated by Chinese firms.¹ Each case study examines the characteristics and functions of port projects developed and operated by Chinese companies across the Indian Ocean region.² The distinctive features of these projects are: (1) their strategic locations, positioned astride major sea lines of communication (SLOCs) and clustered near vital maritime chokepoints; (2) the comprehensive nature of Chinese investments and operations, involving coordination among state-owned enterprises and private firms to construct not only the port, but rail, road, and pipeline infrastructure, and further, to promote finance, trade, industry, and resource extraction in inland markets; and (3) their fused civilian and military functions, serving as platforms for economic, military, and diplomatic interactions.

Strategic strongpoints advance a Chinese Communist Party (CCP) leadership objective to become a "strong maritime power"³ (海洋强国)—which requires, inter alia, the development of a strong marine economy and the capability to protect "Chinese rights and interests" in the maritime domain.⁴ With the notable exception of the sole overseas People's Liberation Army (PLA) base at Djibouti, all of the facilities examined in this series are ostensibly commercial. Even the Chinese presence in Djibouti has some major commercial motivations (addressed in detail in this study). However, China's strategic strongpoint model integrates China's various commercial and strategic interests, facilitating Chinese trade and investment with the host country while also helping the PLA establish a network of supply, logistics, and intelligence hubs across the Indian Ocean and beyond.

¹ For an overview of this concept, see Conor Kennedy, "Strategic Strongpoints and Chinese Naval Strategy." Jamestown Foundation *China Brief* 19, no. 6 (March 22, 2019), <https://jamestown.org/program/strategic-strong-points-and-chinese-naval-strategy/>.

² Currently planned case studies include Gwadar in Pakistan, Colombo and Hambantota in Sri Lanka, and Kyaukpadaung in Myanmar. None of these other commercial port projects has any PLA military facilities to date, but Chinese analysts discuss each as a potential strategic strongpoint.

³ This objective is enshrined in the 18th and 19th CCP National Party Congress reports (2012, 2017), as well as the PRC's 13th "Five-Year Plan" for Economic Development (2016). See: 胡锦涛在中国共产党第十八次全国代表大会上的报告 ["Hu Jintao's Report to the 18th Party Congress"], 人民日报 [*People's Daily*], November 8, 2012, <http://cpc.people.com.cn/n/2012/1118/c64094-19612151.html>; 习近平在中国共产党第十九次全国代表大会上的报告 ["Xi Jinping's Report to the 19th Party Congress"], 人民日报 [*People's Daily*], October 28, 2017, <http://cpc.people.com.cn/n1/2017/1028/c64094-29613660.html>; 中华人民共和国国民经济和社会发展第十三个五年规划纲要 ["Outline of the 13th Five-Year Plan for PRC Economic and Social Development"], 新华社 [*Xinhua*], March 17, 2016, http://www.xinhuanet.com/politics/2016lh/2016-03/17/c_1118366322_11.htm.

⁴ 习近平在中共中央政治局第八次集体学习时强调：进一步关心海洋认识海洋经略海洋 推动海洋强国建设不断取得新成就 ["Xi Jinping at the Central Committee Politburo Eighth Study Group, Take a Step Toward Considering Maritime Consciousness, Maritime Strategic Management, Promote the Construction of Maritime Power, Constantly Reaching New Achievements"], 人民日报 [*People's Daily*], July 31, 2013, <http://politics.people.com.cn/n/2013/0801/c1024-22401311.html>.

Summary

This report analyzes PRC economic and military interests and activities in Djibouti. The small, east African nation is the site of the PLA's first overseas military base, but also serves as a major commercial hub for Chinese firms—especially in the transport and logistics industry. We explain the synthesis of China's commercial and strategic goals in Djibouti through detailed examination of the development and operations of commercial ports and related infrastructure. Employing the “Shekou Model” of comprehensive port zone development, Chinese firms have flocked to Djibouti with the intention of transforming it into a gateway to the markets and resources of Africa—especially landlocked Ethiopia—and a transport hub for trade between Europe and Asia. With diplomatic and financial support from Beijing, PRC firms have established a China-friendly business ecosystem and a political environment that proved conducive to the establishment of a permanent military presence. The Gulf of Aden anti-piracy mission that justified the original PLA deployment in the region is now only one of several missions assigned to Chinese armed forces at Djibouti, a contingent that includes marines and special forces. The PLA is broadly responsible for the security of China's “overseas interests,” for which Djibouti provides essential logistical support. China's first overseas strategic strongpoint at Djibouti is a secure commercial foothold on the African continent and a military platform for expanding PLA operations in the Indian Ocean and beyond.

Introduction: A Foothold in the Western Indian Ocean

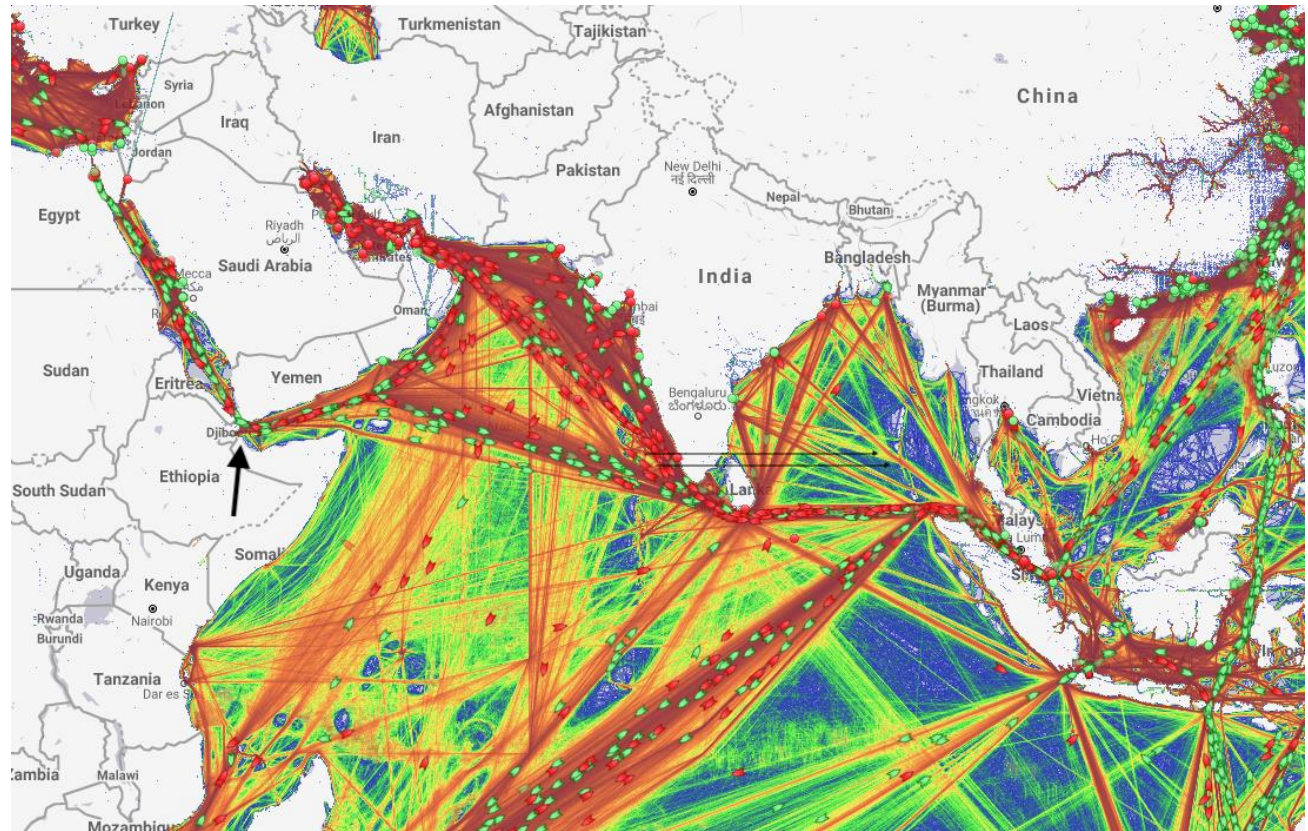


Image 1. Major Indian Ocean Shipping Lanes⁵

China's most important SLOCs run from the mainland across the South China Sea, through the Malacca Strait, and across the east-west trunk route of the Indian Ocean. Passing into the western

⁵ Source: MarineTraffic vessel density 2016-2017, showing tanker and cargo vessels over 75,000 tons gross tonnage.

Indian Ocean, China's "maritime lifeline" (海上生命线) splits in two.⁶ One route heads northwest through the Strait of Hormuz and into the Persian Gulf, the source of some 40 percent of China's imported oil;⁷ the other continues westward to the Bab-el-Mandeb Strait, with Djibouti at its entrance—and beyond it, the Red Sea, Suez Canal, and major markets of the Mediterranean and Europe. With rising demands on the PLA to "protect the security of China's overseas interests,"⁸ especially these vital SLOCs and chokepoints, the requirement to sustain out-of-area operations has made some form of foreign basing posture virtually inevitable.

China is steadily enhancing its ability to project power and secure the western end of this lifeline. Since it began regularized, U.N.-sanctioned anti-piracy escort task forces deployed to the Gulf of Aden in December 2008,⁹ the PLA Navy (PLAN) has developed experience in conducting and sustaining limited operations in the "far seas."¹⁰ Not long after Japan established its first overseas facility in Djibouti in 2011 (joining the U.S., France, and Italy as military tenants of the tiny, former French colony on the Horn of Africa), China seized the opportunity to augment its own presence.¹¹ Beginning in 2012, with construction of a commercial port in partnership with the government of Djibouti, and culminating in the development of a military base adjacent to it, China developed its "first overseas strategic strongpoint" in Djibouti.¹²

While the circumstances that led to the establishment of a formal, dedicated military base at Djibouti are unlikely to be replicated at other sites, that base should be considered as one critical node in an emerging network of overseas port facilities that serve both strategic and commercial purposes.¹³ As a lone base unsupported by other Chinese bases or allies, Djibouti does not yet offer the PLA

⁶ This is a common designation for this critical SLOC in Chinese strategic writing. See, for example, 肖晞 [Xiao Xi], 中国国家安全面临的挑战与战略选择 ["China's National Security Challenges and Strategic Choices"], 薄贵利, 主编 [Bao Guili, ed.], 强国宏略: 国家战略前沿问题研究 [*Grand Strategies for Strengthening the Nation: Research on the Forefront Issues of National Strategy*] (Beijing: People's Press, 2016), p. 505; 胡冬英, 黄锐, 蔡广友 [Hu Dongying, Huang Rui, and Cai Guangyou], 推进潜艇兵力走向远洋的几点思考 ["Several Thoughts on Advancing the Submarine Force to Distant Oceans"], 舰船电子工程 [*Ship Electronic Engineering*], no. 1 (2017), p. 2.

⁷ Tim Gould, Tae-Yoon Kim, "The world can't afford to relax about oil security," *International Energy Agency*, September 19, 2019, <https://www.iea.org/commentaries/the-world-cant-afford-to-relax-about-oil-security>

⁸ "Protecting the security overseas interests" (保护海外利益安全) is one of eight "strategic tasks" (战略任务) outlined in the 2015 PLA White Paper. See PRC State Council Information Office, "China's Military Strategy," May 27, 2015, http://english.gov.cn/archive/white_paper/2015/05/27/content_281475115610833.htm

⁹ 十年, 中国海军护航编队执行护航任务 1190 批次 ["In Ten Years, the Chinese Naval Escort Task Forces has Carried Out 1,190 Escort Missions"], 人民网 [People's Daily Online], December 24, 2018, <http://military.people.com.cn/n1/2018/1224/c1011-30484891.html>.

¹⁰ See Andrew S. Erickson, Austin M. Strange, "No Substitute for Experience," *CMSI Red Book*, no. 10 (2013), <https://digital-commons.usnwc.edu/cmsi-red-books/12/>

¹¹ Vice Admiral (ret.) Michael Franken, then in command of the Combined Joint Task Force-Horn of Africa, recounts that the PRC Ambassador to Djibouti and PRC defense attaché to Ethiopia approached him at a social event in late 2011 and requested a visit to the U.S. military base at Camp Lemonnier, where they hoped to tour the facility and discuss how the United States had helped Japan establish its military presence in Djibouti (Author interview with Franken, March 2020); Alex Martin, "First Overseas Military Base Since WWII to Open in Djibouti," *The Japan Times*, July 2, 2011, <https://www.japantimes.co.jp/news/2011/07/02/national/first-overseas-military-base-since-wwii-to-open-in-djibouti/#.Xm1onqhKiUk>.

¹² 刘琳 [Liu Lin], "一带一路'沿线战略支点与军事外交建设 ["Strategic Strongpoints Along the 'Belt And Road' and Building Military Diplomacy"], 世界知识 [*World Knowledge*], July 26, 2017, <http://m.dunjiaodu.com/waijiao/1562.html>.

¹³ For a detailed discussion of the establishment of the facility, see Erica Downs, Jeffrey Becker, and Patrick DeGateño, "China's Military Support Facility in Djibouti: The Economic and Security Dimensions of China's First Overseas Base," *Center for Naval Analyses*, July 2017, <https://apps.dtic.mil/docs/citations/AD1038215>.

significant wartime capability.¹⁴ Instead, it serves largely as a supply, logistics, and intelligence hub for increasingly complex peacetime military operations across China's Indian Ocean lifeline, now anchored in the east by China's cluster of artificial island bases in the South China Sea.¹⁵ The PLA Academy of Military Science's authoritative 2013 *Science of Military Strategy* advocated for such a pattern:

[W]e must build overseas strategic strongpoints that depend on the homeland, radiate into the surrounding areas, and move toward the two oceans [i.e., the Pacific and Indian Oceans]. [Each strongpoint] will provide support for overseas military operations or act as a forward base for deploying military forces overseas, exerting political and military influence in relevant regions, and forming a posture with the homeland strategic layout that accounts for both the interior and the exterior, links the near with the far, and mutually supports the other.¹⁶

Chinese officials and analysts are quick to distinguish PRC "strategic strongpoints" from traditional military bases, contrasting a benign PLA overseas presence with the bases owned by other countries—especially the "hegemonic" system of U.S. military bases on foreign soil.¹⁷ According to Chinese officials, the Djibouti "support base" (保障基地) is intended to "fulfill international obligations," by providing humanitarian relief, supporting Chinese peacekeeping in Africa, assisting ongoing anti-piracy missions, and "maintaining peace and stability in Africa and the world."¹⁸

¹⁴ A leading Chinese maritime strategist offered the analogy of Imperial Germany's naval base at Qingdao, which was also isolated and thus quickly seized by Japan and the United Kingdom in World War I (Author discussion with Hu Bo, Director of the Centre for Maritime Strategy Studies at Peking University, February 2019). Section V below offers a fuller assessment of the military capability provided by the base.

¹⁵ 侯昂好 [Hou Anghao], 超越马汉: 关于中国未来海权道路发展的思考 ["Beyond Mahan: Thoughts on the Future Development Path of Chinese Seapower"], 国防 [National Defense], no. 3 (2017), pp. 45-54; 陈贞国 [Chen Zhengguo], 三沙: 打造海上丝路战略支点 ["Sansha, Creating a Maritime Silk Road Strategic Strongpoint"], 世界知识 [World Affairs], no. 12 (2016), pp. 52-53.

¹⁵ 郑崇伟, 高成志, 张仲, 孔洁, 万勇 [Zheng Chongwei, Gao Chengzhi, Zhang Zhong, Kong Jie, Wan Yong], 岛礁跑道设计中的风候特征分析 ["Wind Climate Analysis Under the Demand of Reef Runway Construction"], 海洋预报 [Marine Forecasts] 34, no. 4 (August 2017), pp. 52-57; Zheng Chongwei, et al., 经略 21 世纪海上丝绸之路: 综合应用平台建设 ["The Strategy of Maritime Silk Road in the 21st Century: Construction of Integrated Application Platform"], 海洋开发与管理 [Ocean Development and Management], no. 2 (2017), pp. 52-57.

¹⁶ 寿晓松 [Shou Xiaosong], ed., 战略学 [Science of Military Strategy], (Beijing: Military Science Publishing, 2013), p. 254.

¹⁷ According to several well-placed Chinese analysts, "the Chinese government is very cautious in representing its strategic strongpoints, and takes pains to distinguish them from American bases overseas, stressing that as a prerequisite they do not threaten the security and sovereignty of the port country, building only necessary security and defense capabilities, building strategic strongpoints at key areas, coordinating the construction of a regional security system, and ensuring the smooth and secure trade between the host country and China. This is the necessary national security connection for overseas-invested Chinese firms, although this goal is still a long-term one." 国观智库政策研究中心“一带一路”课题组 [Grandview Think Tank "Belt and Road" Research Group], "一带一路"中国海外港口项目战略分析报告 ["'One Belt One Road' Chinese Overseas Port Projects Strategic Analytical Report"], 国观智库 [Grandview Institution], (2019), p. 3. See also 吴敏文 [Wu Minwen], 大国海外军事基地地图 [Map of Great Powers' Overseas Military Bases], 新华网 [Xinhua Net], June 6, 2018, http://www.xinhuanet.com/globe/2018-06/06/c_137212406.htm.

¹⁸ 国防部谈中国驻吉布提保障基地: 为了更好履行国际义务 ["Ministry of Defense talks about China's Support Base in Djibouti: In Order to Better Fulfill International Obligations"], 人民日报 (People's Daily), November 30, 2018, <http://military.people.com.cn/n1/2018/1130/c1011-30434450.html>; 吉布提军事基地是海外扩张第一步? 外交部回应 ["Is the Djibouti military base the first step in overseas expansion? The Ministry of Foreign Affairs Responds"], PRC Ministry of Foreign Affairs, July 13, 2017, <https://www.fmprc.gov.cn/zflt/chn/zfgx/zfgxdfzc/t1477374.htm>. The facility is

Benign or not, the emerging PLA support system overseas is unlikely to mirror America's. Instead, it will follow the PRC's commercial presence to support its expanding portfolio of military missions. PLAN Commander Admiral Wu Shengli described this process even as the base in Djibouti was being built. At a navy seminar held on the eighth anniversary of the Gulf of Aden anti-piracy mission (December 2016), he explained “overseas strategic strongpoint construction provides a new support for escort operations.... [W]e must give full play to the supporting role of the overseas support system to carry out larger scale missions in broader areas and to shape the situation.”¹⁹

This report examines the development of this “overseas support system,” tracking China's broader efforts to “shape the situation” by establishing a robust overseas commercial, diplomatic, and military presence in Djibouti. While the military base appropriately attracts the lion's share of foreign scrutiny, it cannot be understood without examining the role of the Chinese firms that preceded it. By building and operating the necessary infrastructure—both physical and diplomatic—these firms established the PRC's position in Djibouti and paved the way for a major Chinese strategic footprint in Africa.

Section one introduces Djibouti's strategic geography and the Chinese “Shekou Model” of comprehensive development of trade and industry at port sites. Section two describes the characteristics of the Chinese-operated port and free trade zone at Djibouti. Section three takes stock of the transport infrastructure built to service the port and expand its economic and strategic impact. Section four analyzes the inland markets and resources that this transport network intends to access. Section five assesses the functions and capabilities of the new Chinese military base in Djibouti. The case study provides a detailed examination of Chinese military and commercial operations at Djibouti and provides a template for future analysis of other potential “overseas strategic strongpoints.”

A New “Shekou” in Djibouti

Chinese firms see Djibouti as a major transshipment hub and a key to unlocking the economies of the Horn of Africa—most notably, landlocked Ethiopia. The managing director of the leading Chinese firm in Djibouti, China Merchants Port Holdings Company Ltd. (CMPort), explains this vision, noting that Djibouti “is very close to the major Asia-Europe shipping route and is an important gateway port for the hinterland countries within the region.”²⁰ Together with the China Export Import Bank (Exim Bank), CMPort and its parent company, the central state-owned enterprise (SOE) China Merchants Group (CMG),²¹ have established a platform of finance, infrastructure, and trade that enables many Chinese firms to pursue business in a once unappealing economic environment.²²

sometimes called a “logistics and supply base” (后勤补给基地), a “support base” (保障基地), or simply a “military base” (军事基地).

¹⁹ 梁庆松, 王元元 [Liang Qingsong, Wang Yuanyuan], 海军召开亚丁湾护航 8 周年研讨会 [“The Navy Holds a Seminar on the 8th Anniversary of the Gulf of Aden Escorts”], 人民海军 [People's Navy], December 30, 2016, p. 1.

²⁰ Julien Wagner and Oliver Caslin, “Investment is not limited to ports”: Jingtao Bai, director general of China Merchants Port Holdings,” *The Africa Report*, March 20, 2019, <https://www.theafricareport.com/10475/investment-is-not-limited-to-ports-jingtao-bai-director-general-of-china-merchants-port-holdings/>

²¹ “Central SOEs” are the 95 firms under the direct supervision of the PRC State Council's State-Owned Assets and Administration Commission (SASAC). See PRC State Council, 企业名录 [“Central State-owned Enterprise Directory”], November 8, 2019, available at <http://www.sasac.gov.cn/n2588035/n2641579/n2641645/index.html>.

²² Prior to the influx of major investment, there were very few private Chinese businesses operating in Djibouti. The Ministry of Commerce's 2018 guide on investment in Djibouti stated there were only two Chinese restaurants, and a small Chinese grocery store for the 2,000 Chinese nationals in country. See 对外投资合作国别(地区)指南 – 吉布提 (2018 版)

With an estimated \$15 billion total Chinese investment in development of the port and its hinterlands, China is the largest external commercial player in Djibouti.²³ The relatively large PRC commercial presence reflects, at least in part, Western absence. Western analysts have repeatedly questioned the feasibility of the Djiboutian government's proposed infrastructure projects,²⁴ and expressed concerns about its large government debt load.²⁵ China, by contrast, has not balked at the financial risk inherent in investing in Djibouti and has fast become the nation's principal economic partner and creditor.²⁶ Djibouti's president, Ismail Omar Guelleh, said in April 2017 that, "no one but the Chinese offers a long-term partnership in Djibouti."²⁷ China-Djibouti relations were upgraded to a "Comprehensive Strategic Partnership" when Guelleh visited China in November that year.²⁸

Djiboutian authorities hope the partnership with the PRC will transform Djibouti into the "Singapore" or "Dubai of East Africa."²⁹ The CMG President touted his firm's success in Guangdong as a "template for development in Djibouti," where they seek to leverage the "transformative power of ports."³⁰ This transformation entails building transport infrastructure, industrial parks, free trade and export processing zones, and developing commercial services and residential areas adjacent to the port. CMPort markets this style of comprehensive development as the "Shekou Model" (蛇口模式).³¹ This business model derives its name and inspiration from

[“Guide to Foreign Investment Cooperation by Country (Region) (2018)”], 中华人民共和国商务部 [PRC Ministry of Commerce], 2018, p. 3, 6, http://obor.sh-itsc.net/article/ffnew/gbznnew/201903/1467957_1.html.

²³ “‘One Belt One Road’ Chinese Overseas Port Projects Strategic Analytical Report,” pp. 10-11; “Strengthening Djibouti Port’s Strategic Position,” *Port de Djibouti*, July 4, 2015, <http://www.portdedjibouti.com/strengthenin-djibouti-ports-strategic-position/>

²⁴ An aspirational Djiboutian government report from 2017 lays out an ambitious aim to become the logistical and commercial hub for East Africa. Republique de Djibouti, “Vision Djibouti 2035,” <http://www.ccd.dj/w2017/wp-content/uploads/2016/01/Vision-Nationale.pdf>.

²⁵ The IMF reported in December 2018 that “The Djiboutian authorities’ strategy of investing in infrastructure to transform the economy and position the country as a logistics and commercial hub offers great opportunities for economic growth and development. However, the financing of this strategy through a build-up of debt has resulted in debt distress, which poses significant risks. Public and publicly guaranteed debt is expected to be around 104 per cent of GDP at end-2018.” See: “IMF Staff Concludes the 2018 Article IV Consultation Mission in Djibouti,” IMF Press Release No. 18/486, December 19, 2018, <https://www.imf.org/en/News/Articles/2018/12/19/pr18486-djibouti-imf-staff-concludes-the-2018-article-iv-consultation-mission>; Monte Reel, “Djibouti Is Hot: How a Forgotten Sandlot of a Country Became a Hub of International Power Games,” Bloomberg, March 23, 2016, <https://www.bloomberg.com/features/2016-djibouti>; Mary Harper, “Can Ethiopia’s Railway Bring Peace to Somalia?” BBC, November 23, 2015, <http://www.bbc.com/news/world-africa-34871074>.

²⁶ International Monetary Fund, “Djibouti, 2019 Article IV Consultation,” *IMF Country Report*, No. 19/314, October 2019, <https://www.imf.org/~media/Files/Publications/CR/2019/1DJIEA2019002.ashx>; John Hurley, Scott Morris, and Gailyn Portelance, “Examining the Debt Implications of the Belt and Road Initiative from a Policy Perspective,” *Center for Global Development Policy Paper*, no. 121 (March 2018), <https://www.cgdev.org/sites/default/files/examining-debt-implications-belt-and-road-initiative-policy-perspective.pdf>.

²⁷ Francois Soudan, “No One but China Offers a Long-term Partnership in Djibouti: President Guelleh,” *TesfaNews*, April 11, 2017, <https://www.tesfanews.net/president-guelleh-only-china-offers-long-term-partnership-djibouti/>.

²⁸ Guide to Foreign Investment Cooperation by Country (Region) (2018).

²⁹ See also Edmund Blair, “China to Start Work Soon on Naval Base in Djibouti—Guelleh,” *Reuters*, February 2, 2016, <http://uk.reuters.com/article/uk-djibouti-china-idUKKCN0VB1Z6>; Frank Kane, “The Man Who Wants to Make Djibouti the Next Dubai,” *The National*, March 17, 2015, <https://www.thenational.ae/business/the-man-who-wants-to-make-djibouti-the-next-dubai-1.46688>

³⁰ Deng Yanzi, “Building the Shekou of East Africa,” *China Daily*, March 27, 2017, http://www.chinadailyasia.com/asiaweekly/2017-03/27/content_15592240_2.html.

³¹ 林佳铭, 章强 [Lin Jiaming, Zhang Qiang], 招商局港口‘前港—中区—后城’模式的海外拓展之旅 [“The Overseas Expansion of China Merchants Port’s ‘Port in Front—Zone in the Center—City in the Rear’ Model”], 中国港口 [China Ports], no. 3 (2019), pp. 25–29. Author interviews with CMPort managers, Hong Kong, June 2019.

Shekou, once a tiny fishing village in China's Guangdong Province. CMG developed a seaport and export processing zone there in the early 1980s, propelling neighboring Shenzhen's growth into a world-class commercial, financial, and industrial hub.³² The firm is now promoting this model in the small east African nation of Djibouti. The core of this effort is a cluster of ports and associated railway, pipeline, and road infrastructure that are designed to "make Djibouti the Shekou of East Africa—for regional shipping, logistics, and trade," in the words of CMG President Li Xiaopeng.³³

This phased development model is also described in shorthand as a "port-park-city" model (前港, 中区, 后城). This signature CMG approach to port development is designed to facilitate not just the transportation of goods, but to foster a wider business ecosystem that supports broader development.³⁴ By clustering industrial, logistics, and business service facilities adjacent to the port of Djibouti, Chinese firms hope to replicate the extraordinary success of Shenzhen.³⁵ The CMPort managing director calls attention to his firm's "past the pier" development efforts that "are not limited to ports but [include an] international free trade zone and urban development called the Shekou 'port-park-city' comprehensive development model."³⁶

Djiboutian authorities are enthusiastic about the "innovative model implemented by China Merchants" and quite naturally seek the same extraordinary growth.³⁷ Yet Djibouti manifestly lacks most of the advantages enjoyed by Shenzhen. The Shekou port complex on Shenzhen's western periphery is nested among the massive population centers of Hong Kong and Guangzhou. It sits in the heart of the Pearl River Delta, the commercially vibrant zone at the center of the PRC export miracle,³⁸ where it enjoys the benefits of a massive labor pool, productive export-facing industries, and growth-oriented, technocratic governance. These benefits are largely unavailable on the Horn of Africa. Still, Djibouti is a vital gateway to a large part of the African continent with a rapidly expanding population, which may be poised to develop robustly with sound investment and economic planning. What Djibouti lacks in terms of pre-existing economic development may be partially compensated for by serving as an especially important ocean access hub for the Horn of Africa.

³² Deng Yangzi, "CMG Wants to Make African Port of Djibouti 'New Shekou'," *China Daily*, March 7, 2017, http://www.chinadaily.com.cn/bizchina/2017-03/07/content_28455386; for detailed discussions of the model and its applications, see Lin and Zhang, "The Overseas Expansion of China Merchants Port;" 孔晓青[Kong Xiaoping], 招商港口发展“蛇口模式”的形成 [“Formation of the China Merchants Port 'Shekou Model' of Development”], 国家航海 [National Navigation], (November 2017, pp. 39-54; 何继江, 刘宁 [He Jijiang, Liu Ning], 蛇口模式: 一种社会技术创新 [“Shekou Model: A Type of Social Innovation of Technology”], 特区经济 [Special Economic Zone Economies], no. 12 (2014), pp. 53-57.

³³ Deng Yanzi, "Building the Shekou of East Africa."

³⁴ 余舒虹 [Yu Shuhong], 招商蛇口: “前港, 中区, 后城”蛇口模式加快复制 [“China Merchants' Shekou: 'Port in Front, Industrial Parks in the Middle, City in the Back' The Shekou Model to be Quickly Replicated”], 经济观察网 [Economic Observations Net], October 24, 2016, <http://www.eeo.com.cn/2016/1024/292959.shtml>

³⁵ Deng Yanzi, "CMG Wants to Make African Port of Djibouti 'New Shekou'," *China Daily*, March 7, 2017, https://www.chinadaily.com.cn/business/2017-03/07/content_28455386.htm; Wagner and Caslin, "Investment is not limited to ports."

³⁶ Wagner and Caslin, "Investment is not limited to ports."

³⁷ Aboubaker Omar Hadi, chairman of the Djibouti Port and Free Zone Authority, quoted in 高江虹[Gao Jianghong], “蛇口模式 4.0”落地吉布提, 招商局雁形出海 [“Shekou Model 4.0” Arrives in Djibouti, China Merchants 'Flying Geese' Model Goes Abroad"], 21 世界经济报道 [21st Century Business Herald], July 5, 2017, http://epaper.21jingji.com/html/2017-07/05/content_65726.htm

³⁸ See Ezra Vogel, *One Step Ahead in China: Guangdong Under Reform*, (New York: Columbia University Press, 1989).

China's approach to Djibouti takes advantage of hundreds of other Chinese firms, private and state-owned, which are clamoring to do business in the growing African market.³⁹ PRC policy fosters and advances such overseas investment. CMG, for instance, enjoys substantial backing from Beijing in the form of access to a large pool of loan capital from central policy banks (like Exim Bank) and local financing,⁴⁰ including targeted Belt and Road Initiative (BRI) lending from the "Silk Road Fund" and other central- and local-government external trade and investment initiatives to promote the project.⁴¹ Further central support for Chinese firms to build a commercial presence in Africa comes through the diplomatic and political boost provided by government programs, particularly the Forum on China-Africa Cooperation (FOCAC) and the BRI.⁴²

Li Guofeng, director of the Overseas Business Department of CMG, explained how his firm is positioning itself with respect to the BRI, for which the firm's leadership has been a leading proponent:⁴³

[T]he situation in many developing countries along the "Belt and Road" is similar to that in Shekou at the beginning of reform and opening up, such as the advantages of low labor costs and low land costs. But the reason why companies are unwilling to invest is because the infrastructure and soft business environment of many countries is still relatively poor. Therefore, China Merchants hopes to provide a platform for Chinese-funded enterprises to feel a similar investment environment in China in this region, and to allay their concerns about going global.⁴⁴

This comprehensive approach—in which Chinese financing, expertise, and labor are poured into integrated port, infrastructure, and industrial projects—is driven in part by China's ongoing need to shed excess domestic industrial capacity. Vast investment in domestic industry, especially during the stimulus following the global financial crisis of 2008, yielded a surplus of labor and capital in several

³⁹ A detailed accounting of Chinese firms' commercial presence in Africa, including data and analysis on trade, investment, and construction contracts, is available on the Johns Hopkins University's China Africa Research Initiative website at <http://www.sais-cari.org/other-data>. See also Deborah Brautigam, *The Dragon's Gift: The Real Story of China in Africa*, (Oxford: Oxford University Press, 2019).

⁴⁰ The Belt and Road Initiative has created incentives for local governments and SOEs to pile into infrastructure investment by providing cheap loan capital. See 孙丽朝 [Sun Lichao], 中欧班列挤'泡沫' ["Crowding into the China-Europe Rail 'Bubble'"], 等深线 [Depth Paper], July 26, 2019, cited in Ryan Manuel, "Twists in the Belt and Road," *China Leadership Monitor*, Fall 2019, no. 61, <https://www.prcleader.org/manuel-belt-road>.

⁴¹ According to the deputy governor of the People's Bank of China (PBOC), the PBOC and other central organs are supporting special funds and rates for Chinese banks and other lenders to facilitate BRI priorities. See 陈雨露 [Chen Yulu], 书写 '一带一路' 投融资合作新篇章 ["Writing a New Chapter in 'Belt and Road' Investment and Financing Cooperation"], 全球商业经典 [Global Commerce Classic], no. 6 (2019). For analysis of which firms are getting BRI loans, see Li Xiaojun and Zeng Ka, "To Join or Not to Join? How Chinese Firms View the Belt and Road Initiative," *Pacific Affairs*, 92, no. 1 (2019), pp. 5–26.

⁴² 姚桂梅 [Yao Guimei], "一带一路"建设下的中非产能合作 ["China-Africa Production Cooperation in Construction of the 'Belt and Road'"], 中国共产党新闻网 [Communist Party of China News Network], July 18, 2017, <http://cpc.people.com.cn/n1/2017/0718/c191095-29412141.html>.

⁴³ CMG President Li Jianhong gave a keynote speech at the fifth anniversary party for the BRI, joined by Politburo Standing Committee member and State Council Vice Premier, Han Zheng. See 黄玥, 张敏彦 [Huang Yue, Zhang Minyan], 共建 "一带一路", 习近平提出从 "大写意" 到 "工笔画" ["Jointly Build the Belt and Road: Xi Jinping proposed moving from 'large freehand brushstrokes' to 'meticulous detail'"], 新华社 [Xinhua], August 28, 2018, http://www.xinhuanet.com/politics/xxjxs/2018-08/28/c_1123341344.htm.

⁴⁴ Gao, "'Shekou Model 4.0' Arrives in Djibouti."

key sectors.⁴⁵ This surplus is now directed toward foreign markets through a series of policy measures, of which the BRI is only the most widely promoted.⁴⁶ Overcapacity in traditional heavy industries, such as steel, cement, and shipbuilding, and in infrastructure construction sectors, such as ports, roads, bridges, and railways, has been a policy concern for PRC economic planners for nearly a decade.

The agenda for the 2012 Central Economic Work Conference, for instance, included discussions of ways to productively employ this excess industrial capacity to bridge the growing demand-supply gap while policy makers undertook structural adjustments to the national economy.⁴⁷ Thus, when the CMG President noted that “China’s port industry should export its capacity to overseas markets where the demand for port construction is strong,”⁴⁸ he was voicing one of the principal domestic rationales for China’s investments in the Horn of Africa. Alleviating this overcapacity will be essential to avoid economic headwinds created by the many structural ailments in China’s national economy, including debt over-accumulation, bankruptcies, lay-offs, and continued damage to the environment.⁴⁹

The success of the Shekou model depends on more than pouring surplus capital and excess industrial capacity into building and operating a port and adjacent free trade zone. Like the Pearl River Delta in China, these projects must be connected to the broader economic region in order to achieve anything like the economic dynamism of Shenzhen. Accordingly, if Djibouti is to become a regional transport gateway and transshipment hub, it will do so largely on the strength of its links to the continent.⁵⁰ Ethiopia in particular is an attractive market for the possibilities it presents for long-term development. Though Djibouti itself has a tiny population with little economic potential of its own, its geographic position provides the opportunity to unlock youthful, fast-growing Ethiopia’s potential in global markets.⁵¹ Djibouti’s ports are well situated to provide commercial access to land-locked Ethiopia, and as a transshipment hub for cargo moving from the west across the Indian Ocean to markets in South and East Asia and from the east through the Red Sea and Suez Canal to markets in

⁴⁵ Most notable among the sectors and products with overcapacity is the construction industry. There is also noted overproduction of aluminum, cement, chemicals, coal, coal-fired power, paper, plated glass, shipbuilding, solar power, and steel. See International Monetary Fund, “People’s Republic of China: 2017 Article IV Consultation, Staff Report,” *IMF Country Report*, no. 17.247, p. 18.

⁴⁶ An authoritative statement of this objective to actively undertake major infrastructure and industrial projects abroad that would further facilitate the export of various Chinese products can be found in a 2013 directive, State Council of the People’s Republic of China, 国务院关于化解产能严重过剩矛盾的指导意见 [“Guiding Opinions of the State Council on Resolving Serious Production Overcapacity Conflicts”], 中华人民共和国中央人民政府 [The Central People’s Government of the PRC], October 6, 2013, http://www.gov.cn/jwqk/2013-10/15/content_2507143.htm

⁴⁷ 张前荣 [Zhang Qianrong], 我国当前产能过剩的现状、原因及应对政策 [“The Current Status, Causes, and Policy Responses to China’s Current Production Overcapacity”], 经济预测部-国家信息中心 [Economic Forecasting Department—National Information Center], July 16, 2014, <http://www.sic.gov.cn/News/455/3068.htm>

⁴⁸ Deng Yanzi, “CMG Wants to Make African Port of Djibouti ‘New Shekou.’”

⁴⁹ He Yafei, “China’s Overcapacity Crisis Can Spur Growth Through Overseas Expansion,” *South China Morning Post*, January 7, 2014, <https://www.scmp.com/comment/insight-opinion/article/1399681/chinas-overcapacity-crisis-can-spur-growth-through-overseas>.

⁵⁰ “Construction of Djibouti’s third sea port begins,” *Economist Intelligence Unit*, December 28, 2012, <http://country.eiu.com/article.aspx?articleid=989990683&Country=D>

⁵¹ Ethiopia made peace and restored full diplomatic relations with Eritrea in July 2018, and the two vowed to open their borders for trade, giving the nation another potential access point to the oceans. The infrastructure and economic relationships for such a development are possible over the medium- to long-term. See Bob Koigi, “Somalia, Eritrea and Ethiopia seek economic integration,” *Africa Business Communities*, July 7, 2018, <https://africabusinesscommunities.com/news/somalia-eritrea-and-ethiopia-seek-economic-integration/>.

North Africa and Europe.⁵² Building the modern infrastructure to do so will be a long-term endeavor. However, the implementation of the Shekou Model in East Africa has already achieved significant progress, leaving China poised to take advantage of the market potential and resources of the Horn of Africa.

Port Capacity and Characteristics

The ports in Djibouti consist of several facilities surrounding the Gulf of Tadjoureh, which cuts into the east African coastline just southwest of the Bab al-Mandeb. Several of them were in place well before the Chinese appeared on the scene in 2013, and were formerly operated under an exclusive 2006 concession to the United Arab Emirates' firm Dubai Ports World (DPWorld), which Djibouti disputed beginning in 2012 and terminated in 2018 (discussed below).⁵³ Since then, China's active development of Djibouti's transport sector has positioned Chinese firms to continue expanding their role in Djibouti's port- and military-base dependent economy.

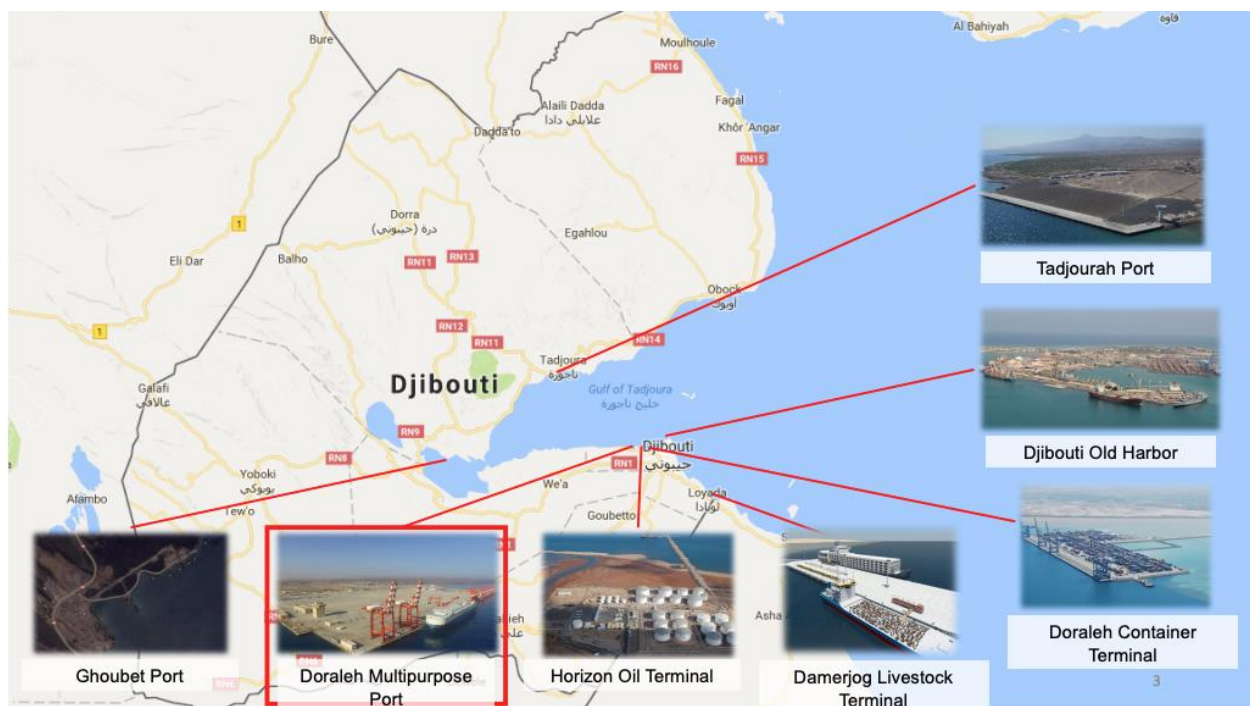


Image 2. The Port of Djibouti

⁵² Edith Mutethya, "Djibouti Launches China-built Free Trade Zone," *China Daily*, July 6, 2018, <http://www.chinadaily.com.cn/a/201807/06/WS5b3f03d0a3103349141e12a9.html>.

⁵³ DPWorld took the government of Djibouti to the London Court of International Arbitration (LCIA) in 2018 after Djibouti nationalized the Port of Djibouti in February of that year. DPWorld has received five orders from LCIA in its favor, including monetary compensation and restoration of their concession. The government of Djibouti has rejected these awards, physically seized the asset, restructured its management, and passed legislation that allows it to "terminate all contracts relating to strategic infrastructures which are deemed to be contrary to the fundamental interests of the Republic." DPWorld has also brought CMPort to the Hong Kong Court of First Instance, which is still being tried. All of these facts are presented with documentation in "Decision," DPWorld Djibouti FZCO, Dubai (International) Djibouti FZE, Doraleh Container Terminal SA v. China Merchants Port Holdings Company Limited, High Court of the Hong Kong Special Administrative Region, Court of First Instance, Action no. 1951 of 2018, December 20, 2019, https://legalref.judiciary.hk/lrs/common/search/search_result_detail_frame.jsp?DIS=126220&QS=%24%26%2340%3Bdji+bouti%26%2341%3B&ID=AAAB73AAIAAAXpuAAC&TP=JU.

Doraleh Multipurpose Port

The Doraleh Multipurpose Port is the centerpiece of China's economic position in Djibouti. It is owned and operated by a joint venture between CMPort (with 23.5 percent equity) and the public port authority of the Djibouti government, Port de Djibouti, S.A. (PDSA), finalized in December 2012.⁵⁴ The facility went into service in May 2017,⁵⁵ shortly before the formal opening in July of the PLA base that abuts its western flank.⁵⁶ The joint venture gives CMPort a stake in ownership and operations across all the dispersed facilities of the Port of the Port of Djibouti, comprising not only the modern container terminal formerly operated by DPWorld (the Doraleh Container Terminal), but also the Horizon Oil Terminal, the "old port" in the city of Djibouti, Tadjourah Terminal across the Gulf to the northwest, and Ghoubet Port, a salt terminal in the far west of the Gulf.⁵⁷ See Image 2 above.

The port was the culmination of a 4-year, \$590 million project financed by China's Exim Bank.⁵⁸ China State Construction Engineering Corp and China Civil Engineering Construction Corp designed and built the port between 2013 and 2017.⁵⁹ The port has six 1200 meter ship berths, from 15.3 to 15.5 meters deep, that take container, dry bulk, breakbulk, and RO/RO cargos.⁶⁰ They accommodate 100,000 deadweight ton "Capesize" vessels too large to transit the Suez Canal, which must offload to smaller ships at a transshipment hub before cargo can travel to the Mediterranean and beyond. Supporting the berths are a 23-hectare container terminal, a 57-hectare cargo yard, a 20-hectare bulk terminal, a 15-hectare vehicle yard, and 3.5-hectare warehousing area. The total capacity for non-containerized cargo is 8.8 million tons.⁶¹

The port's performance, at least measured in terms of container throughput, is not currently trending toward "Dubai" or "Shekou" status. In 2018, the Doraleh Multipurpose Port moved only 49,000 TEU of containerized cargo out of a designed capacity of 220,000 TEU.⁶² The CMPort 2018 annual report attributes this 7.5 percent year-on-year reduction in container throughput in Djibouti to decreases in

⁵⁴ 招商局国际有限公司 [China Merchants Holdings (International) Company Limited], "Acquisition of 23.5% interests in Joint Venture in Djibouti," *The Stock Exchange of Hong Kong*, December 30, 2012, <https://www1.hkexnews.hk/listedco/listconews/sehk/2012/1230/ltm20121230025.pdf>

⁵⁵ "Djibouti's Doraleh Port Officially Opens," *Xinhua*, May 24, 2017, http://news.xinhuanet.com/english/2017-05/24/c_136312120.htm.

⁵⁶ 张庆宝 [Zhang Qingbao], 我驻吉布提保障基地部队进驻营区仪式举行 ["Ceremony for the entry of our troops into the Djibouti Support Base"], 中国军网 [China Military Online], August 1, 2017, http://www.81.cn/hj/2017-08/01/content_7699505_5.htm.

⁵⁷ Port de Djibouti, S.A., <https://www.portdedjibouti.com/>

⁵⁸ International Monetary Fund, Djibouti Staff Report for the 2016 Article IV Consultation—Debt Sustainability Analysis, February 7, 2017, 3, <https://www.imf.org/external/pubs/ft/dsa/pdf/2017/dsacr1787.pdf>; The Export-Import Bank of China, 中国进出口银行与招商局集团有限公司签署战略合作协议 ["The Export-Import Bank of China and China Merchants Group Sign a Strategic Cooperation Agreement"], 中国进出口银行 [The Export-Import Bank of China], December 16, 2016, http://www.eximbank.gov.cn/tm/Newlist/index_343_29632.

⁵⁹ "Djibouti's Doraleh Port Officially Opens," 亚吉模式: 铁路全产业链成功实践 ["The China-Ethiopia Model: A Successful Framework for End-to-End Railway Construction"], 中国土木工程集团有限公司 [China Civil Engineering Construction Corporation], May 22, 2017, http://ccec.crcc.cn/art/2017/5/22/art_7609_1136232.html.

⁶⁰ Except where otherwise noted, data on port characteristics and capacity are from IHS Markit, "Djibouti," *Seaweb Ports*, World Port Number: PO1478, UNLOCODE: DJJIB

⁶¹ IHS Global Limited, "Djibouti (World Port Number PO1478)" *Sea-web Ports* (accessed March 17, 2019); "Doraleh Multi-Purpose Port," Port de Djibouti, S.A., <http://www.portdedjibouti.com/doraleh-multi-purpose-port/>.

⁶² TEU is twenty-foot equivalent units, a measure of port throughput based on the average volume of an intermodal container. See: "Global Container Terminal Operators Annual Review and Forecast, Annual Report 2019" *Drewry Maritime Research*, p. 165

transshipment volume to Ethiopia—that is, precisely the opposite effect of that anticipated by the business model.⁶³ Despite reductions in service prices after the opening of the Doraleh Multipurpose Port, Ethiopia is pursuing a policy to diversify its international trade routes and is in discussions with the Republic of Somaliland to develop Berbera Port, where DPWorld is active after being jettisoned from Djibouti. Such developments could weaken the virtual monopoly Djibouti currently holds on Ethiopian trade routes to the sea.⁶⁴ Nonetheless, the CMPort Interim Report for 2019 (the latest available as of April 2020) reports increases in container throughput of 11.1 percent and an increase of 23.4 percent in bulk cargo volume in the first half of 2019.⁶⁵

Tadjourah

Across the Gulf to the north, the Tadjourah bulk terminal is another of the assets in CMPort’s joint venture. Djibouti’s port authority anticipates traffic of 4 million tons of cargo per year,⁶⁶ but there is little reporting in Chinese or industry sources on its operations. The terminal’s construction was contracted to a Hubei-based company and was designed to export potash from northern Ethiopia via rail from Semere. Construction at the port began in December 2012 and was completed in 2017. However, the anticipated rail connection was never completed, and the port has no major road connection, so Tadjourah port appears to sit idle.

Ghoubet

The Ghoubet mineral terminal was built by China Harbor Engineering Corporation between 2013 and 2017. With \$64 million in preferential loans from China’s Exim Bank, this terminal was designed to export 5 million tons per year of processed salt from Djibouti’s nearby Lac Assal, reported to contain around 2 billion tons of salt minerals that had previously been harvested only in small quantities through traditional methods.⁶⁷ China Communication Construction Company purchased 65 percent of a local salt developer and established the Djibouti Salt Investment Company Ltd. to industrialize the scale of extraction and export. China Communication Construction Company has exclusive rights for 50 years to develop the local salt and bromine resources.⁶⁸

⁶³ “China Merchants Port Holding Company, Ltd. Annual Report 2018 (Summary),” China Merchants Port Group Co., Ltd., 2019, http://pdf.dfcfw.com/pdf/H2_AN201903291311713389_1.pdf.

⁶⁴ Birhanu Fikade, “Djibouti Offers 45% Price Cut in Services of Newly Built Multiuse Port,” *The Reporter*, December 7, 2017, <https://www.thereporterethiopia.com/article/djibouti-offers-45-price-cut-services-newly-built-multiuse-port/>; “Economic Transformation in Djibouti—Systematic Country Diagnostic,” World Bank Group, October 2018, <http://documents.worldbank.org/curated/en/437351549918326165/pdf/djibouti-scd-english-version-final-approved-vlogo-02062019-636852600790519539.pdf>.

⁶⁵ “China Merchants Port Holding Company Limited Interim Report 2019,” 2019, p. 8, <http://www.cmport.com.hk/UpFiles/bpic/2019-09/20190923043626360.pdf>

⁶⁶ “Port of Tadjourah,” *Port de Djibouti*, SA, <https://www.portdedjibouti.com/port-of-tadjourah/>

⁶⁷ PRC Ministry of Commerce, 对外投资合作国别(地区)指南—吉布提 (2018 版) [“Foreign Investment Cooperation Country (Region) Guide—Djibouti—2018 Edition”], 走出去公共服务平台 [Go Out Public Service Platform], <https://www.yidaiyilu.gov.cn/wcm.files/upload/CMSydy/gw/201902/201902010334033.pdf>, p. 21; PRC Ministry of Commerce, 对外投资合作国别(地区)指南—吉布提 (2013 版) [“Foreign Investment Cooperation Country (Region) Guide—Djibouti—2013 Edition”], 驻吉布提经商处 [Economic and Commercial Counselor in Djibouti], August 21, 2014, <http://dj.mofcom.gov.cn/article/b/201408/20140800705794.shtml>.

⁶⁸ 中交吉布提盐业投资公司获吉阿萨尔盐湖溴化钠项目特许经营权 [“China Communication Construction Company Djibouti Salt Investment Co., Ltd. Was Granted Special Operating Rights for the Djibouti Lake Assal Sodium Bromide Project”], 驻吉布提使馆经商处 [Economic and Commercial Office of the Embassy in Djibouti], August 25, 2017, <http://www.mofcom.gov.cn/article/i/jyj/k/201708/20170802633341.shtml>; “Djibouti: Small Country, Big Stakes,” *The Africa Report*, August 21, 2018, <https://www.theafricareport.com/541/djibouti-small-country-big-stakes/>.

None of these bulk terminals is operating near capacity, moving only 4.4 million tons in volume in 2018 out of a capacity of almost 20 million tons across all of the facilities.⁶⁹ However, this volume was increasing at a rate of 23.4 percent year-on-year at the time of CMPort's last official report in 2019. The firm attributes the growth to "increasing import demand for relevant raw materials driven by small-scale infrastructure projects in Ethiopia."⁷⁰ Still, given that the ports handled 6.52 million tons in 2016, the new facilities do not appear to be spurring the desired cargo volume.⁷¹

Non-PRC-operated Ports

Prior to CMPort's arrival in 2012, the DPWorld-developed Doraleh Container Terminal and the "old port" were the principal Djiboutian ports. The old port is currently being renovated by CMPort and the Fujian branch of a British real estate firm, with designs on making it a residential and retail zone.⁷² The Doraleh Container Terminal opened in 2008 and initially served as Djibouti's only modern container port facility, with a designed capacity of 1.5 million TEU. Since the government of Djibouti dissolved its joint venture with DPWorld and nationalized the facility in 2018, there has been some controversy as to what rights CMPort's joint venture grants it in this new entity.

The ongoing row between Djibouti and DPWorld raises the question of how much influence China exerts on the Djiboutian government. It seems more than coincidence that relations between DPWorld and the government of Djibouti soured as CMPort entered into a "Strategic Partnership Agreement" with the Djiboutian port authority in December 2012. This issue is part of litigation currently underway in both Hong Kong and London.⁷³ DPWorld alleges that in November 2012, CMPort began negotiating "substantive terms" with the Djiboutian port authority to remove DPWorld nominated directors from their joint venture with Djibouti. In 2017, Djibouti's legislature passed a law allowing it to renegotiate strategic infrastructure deals and by February 2018, Djibouti had terminated its joint venture with DPWorld. Djibouti then seized the port assets under a newly-formed public port operating company, Société de Gestion du Terminal à Conteneurs de Doraleh (SGTD).⁷⁴ Despite some reports that CMPort is "asserting control of operations at Doraleh Container

⁶⁹ Great Horn Investment Holding, "Maritime," <http://www.ghih.dj/maritime>.

⁷⁰ "China Merchants Port Holding Company Limited Interim Report 2019," p. 8.

⁷¹ "China Merchants Port Holding Company Limited Annual Report 2016," p. 15.

⁷² CMPort is set to lead the Djibouti Old Port Reconstruction Project, but has made no announcements since April 2019. 招商蛇口、招商港口与吉布提签署吉布提老港改造项目合作框架协议 ["China Merchants Shekou, China Merchants Port and Djibouti Sign Cooperation Framework Agreement for Djibouti Old Port Reconstruction Project"], April 26, 2019, <https://www.cmsk1979.com/news.aspx?type=9&id=7684>; 邵轶菁 [Shao Yijing], 招商蛇口发力非洲市场, Savills 荣获吉布提老港项目策略顾问委任 ["China Merchants Shekou Powers African Markets, Savills Appointed as Strategic Advisor to Djibouti Old Port Project"], *Savills*, August 22, 2019.

⁷³ See "Decision," High Court of Hong Kong; the London Court of International Arbitration hearings and awards are not public, but it has issued no less than five awards in favor of DPWorld, including monetary damages and restoration of operating rights; Djibouti has rejected all of the awards. See, Costas Paris, "Djibouti Rejects Court Ruling to Hand Back Container Terminal," *Wall Street Journal*, January 17, 2020, <https://www.wsj.com/articles/djibouti-rejects-court-ruling-to-hand-back-container-terminal-11579296713>. The Hong Kong case is also the first instance of a Chinese SOE being sued in Hong Kong by a multinational firm. For details, see 高锋 [Gao Feng], "带路"公案: 跨国公司告国企 ["BRI" Case: Multinational Firms Vs. State-Owned Enterprises"], 自由亚洲电台 [Radio Free Asia], February 11, 2019, <https://www.rfa.org/mandarin/yataibaodao/jingmao/gf1-02112019095745.html>; see also "Decision," High Court of Hong Kong.

⁷⁴ For an agreed timeline of the various stages of DPWorld's feud with the Djiboutian government, see "Appendix," "DPWorld Djibouti FZCO, Dubai (International) Djibouti FZE, Doraleh Container Terminal SA v. China Merchants Port Holdings Company Limited," High Court of the Hong Kong Special Administrative Region Court of First Instance, Action No. 1951 of 2018, October 2, 2019, https://legalref.judiciary.hk/lrs/common/search/search_result_detail_frame.jsp?DIS=126220&QS=%24%28djibouti%29&TP=JU

Terminal,”⁷⁵ the firm is not operating the facility at present and Djiboutian officials deny it will do so in the future.⁷⁶ There has been speculation CMPort will take over operations based on its 16% stake in the former Doraleh Container Terminal joint venture (through its 23.5% stake in Port de Djibouti, S.A.), or as part of a renegotiation of Djiboutian debt to China’s Exim Bank.⁷⁷

The status of that container terminal remains obscure in the midst of ongoing litigation in London and Hong Kong. However, CMPort’s joint venture partner is the Djiboutian port authority, the public entity responsible for port policy and granting concessions in the ports sector. According to the World Bank, “there is no clear chain of command or collaboration” for the port authority, which “falls under the direct supervision of the President [of Djibouti].”⁷⁸ Chinese leaders and managers have forged close connections with President Guelleh,⁷⁹ who has been enamored of Chinese investment since visiting CMPort’s Shekou facilities in 2012.⁸⁰ His daughter is a Mandarin-speaker, and his top economic advisor, his half-brother Saad Omar Guelleh, is the head of the Port de Djibouti, S.A.⁸¹ In displacing Dubai, China is plainly the preferred partner for Djibouti’s ports and is likely to continue to consolidate its dominant commercial position in the years ahead.

Horizon Djibouti Fuel Terminal

This terminal lies west of the Doraleh Container Terminal, and serves as the conduit for some 95 percent of Djibouti’s hydrocarbon needs, including those of the various military tenants of the country.⁸² It was developed by the Emirates National Oil Company (with public and private investment from Djibouti and Kuwait) and consists of a long jetty out to two deep-water berths that accommodate tankers of a maximum 80,000 DWT with up to a draught of 18 meters.⁸³ Ashore it connects to a tank farm for storage and limited processing of petroleum products (including aviation

⁷⁵ Costas Paris, “China Tightens Grip on East African Port,” *Wall Street Journal*, February 21, 2019, <https://www.wsj.com/articles/china-tightens-grip-on-east-african-port-11550746800>.

⁷⁶ Djibouti inspector general Hassan Issa Sultan stated that “there is no China option and no secret plans for the Doraleh Container Terminal.” See “China Merchants Consolidates its Hold in Djibouti,” *The Maritime Executive*, February 21, 2019, <https://www.maritime-executive.com/article/china-merchants-consolidates-its-hold-in-djibouti>.

⁷⁷ Julia Louppova, “A new plan: Djibouti to build another container terminal with CMA CGM,” *Port Today*, March 29, 2018, <https://port.today/djibouti-new-container-terminal-cma-cgm/>; Mercy A. Kuo, “China in Djibouti: the Power of Ports,” *The Diplomat*, March 25, 2019, <https://thediplomat.com/2019/03/china-in-djibouti-the-power-of-ports/>.

⁷⁸ Martin Humphreys, et al, “Port Development and Competition in East and Southern Africa: Prospects and Challenges,” *World Bank Group: International Development in Focus*, 2019, <https://olc.worldbank.org/system/files/Overview%20-%20Port%20Development%20and%20Competition%20in%20East%20and%20Southen%20Africa-2.pdf>.

⁷⁹ Just in the past year, Guelleh met with Xi Jinping in Beijing in April 2019. While in Beijing, he also met with Zhao Leji, a member of the CCP’s Politburo Standing Committee who directs China’s Belt and Road leading small group. The following month, Guelleh met in Djibouti with the PRC Minister of Foreign Affairs, Wang Yi. See: Li Xia, “Xi meets Djiboutian President,” *Xinhua*, 28 April 2019, http://www.xinhuanet.com/english/2019-04/28/c_138018385.htm; Li Xia, “Senior CCPC official meets Djiboutian president,” *Xinhua*, April 28, 2019, http://www.xinhuanet.com/english/2019-04/28/c_138019082.htm; Wang Yamei, “Djibouti president meets with Chinese FM, eyes enhanced cooperation in blue and digital economies,” *Xinhua*, January 10, 2020, http://www.xinhuanet.com/english/2020-01/10/c_138691879.htm

⁸⁰ 吉布提的中非自贸区 [“China-Africa Free Trade Zone in Djibouti”], 新华 [Xinhua], July 30, 2018, http://www.xinhuanet.com/globe/2018-07/30/c_137343110.htm; High Court of Hong Kong, “Appendix.”

⁸¹ Jeffrey D. Becker, “China’s Maritime Silk Road Initiative: Implications for the Global Maritime Supply Chain,” *Testimony to the House Committee on Transportation and Infrastructure*, October 17, 2019, <https://transportation.house.gov/imo/media/doc/Becker%20Testimony.pdf>, p. 7.

⁸² Remy Darras, “Ethiopia’s oil supply constrained by Djibouti logistics battle,” *The Africa Report*, February 21, 2020, <https://www.theafricareport.com/23719/ethiopias-oil-supply-constrained-by-djibouti-logistics-battle/>.

⁸³ IHS Markit, “Djibouti,” *Seaweb Ports*, accessed March 2, 2020. DWT stands for deadweight tonnage, the measure of how much weight a ship can carry.

fuels), chemical and vegetable oils, and liquid petroleum gases.⁸⁴ Capacity limitations for growing hydrocarbon demand have led to a new agreement with Ethiopia to build another oil terminal. No PRC participation in this project is reported.⁸⁵

Free Trade Zone

To the southwest of Doraleh Multipurpose Port is the 48.2 km² Djibouti International Free Trade Zone, a trade and logistics park intended to attract firms to the area to use the port and its connecting infrastructure (see Image 3 below). This zone was formally established in March 2015, when CMG and the Djibouti Ports & Free Zone Authority signed the “Djibouti Free Trade Zone Project Cooperation Framework Agreement.”⁸⁶ Three Chinese firms (the Dalian Port Authority, CMG, and IZP Technologies) are partners in operating the zone. The Dalian Port Corporation began construction of the Free Trade Zone in January 2017.⁸⁷ This initial phase is confined to a 2.4 km² “pilot zone” that accounts for \$370 million of a planned \$3.5 billion investment in a 48 km² zone, claimed to be Africa’s largest.⁸⁸

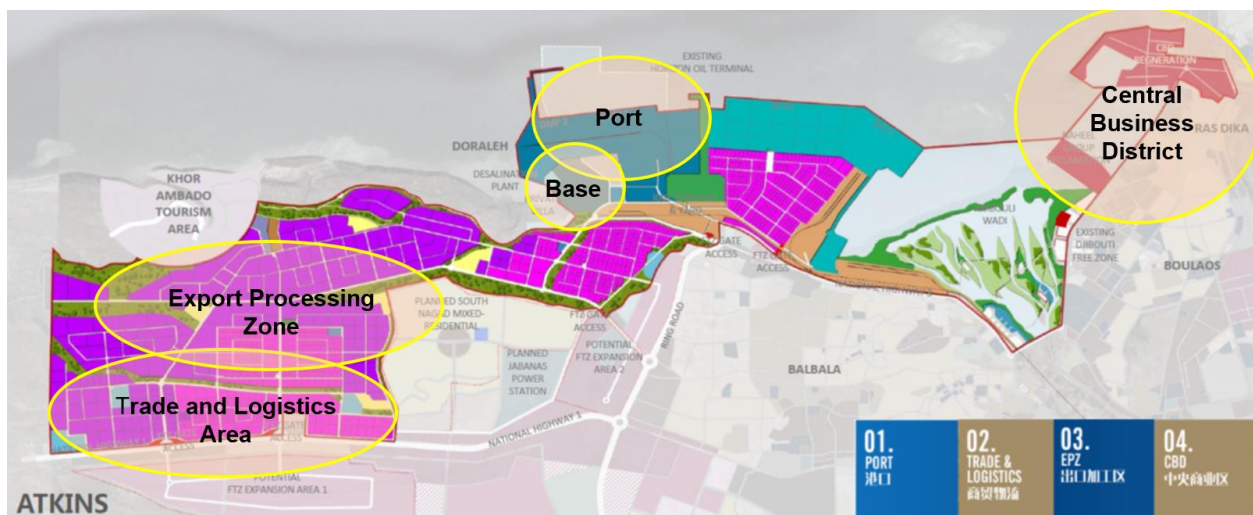


Image 3. The Djibouti Port-Park-City⁸⁹

China’s stake in the Free Trade Zone is controlled through two joint venture entities established in January 2017 (Lac Assal Investment Holding Company Ltd. and East Aden Holding Company Ltd.).

⁸⁴ Horizon Djibouti Terminals Ltd., https://www.horizon-terminals.com/services_existing_terminals_h-djibouti.html

⁸⁵ Angeline Mbogo, “Ethiopian & Djiboutian Governments to Build Oil Terminal in Djibouti Worth \$220m,” *The Kenyan Wall Street*, July 11, 2018, <https://kenyanwallstreet.com/ethiopian-djiboutian-govts-to-build-oil-terminal-in-djibouti-worth-220m/>.

⁸⁶ 中非合作吉布提自贸区开工 [“China-Africa Cooperation Begins in the Djibouti Free Trade Zone”], 中非合作论坛 [China-Africa Cooperation Forum], January 24, 2017, <https://www.fmprc.gov.cn/zflt/chn/zfgx/t1433191.htm>.

⁸⁷ 中企参与的吉布提国际自贸区正式开工建设 [“Chinese Firms Formally Begin Construction at the Djibouti International Free Trade Zone”], 新华社 [Xinhua News], January 17, 2017, http://news.xinhuanet.com/fortune/2017-01/17/c_1120327873.htm; “Construction begins on Djibouti International Free Trade Zone (DIFTZ), *Reuters*, January 19, 2017, http://www.zawya.com/story/Construction_begins_on_Djibouti_International_Free_Trade_Zone_DIFTZ-ZAWYA20170118131616/.

⁸⁸ Djibouti Ports & Free Zones Authority, “Djibouti International Free Trade Zone,” <http://dpfza.gov.dj/facilities/diftz> (accessed March 17, 2019).

⁸⁹ Image from Silk Road E-Merchant’s Website depicting the Ports, Parks, City overview of Djibouti. (Labels and yellow graphics created by authors. Silk Road E-Merchants is a joint venture of China Merchant Group and IZP Group established in 2016 to facilitate trade through big data and overseas financial services. See presentation containing image

At the time of their creation, CMPort granted a loan of “up to \$150 million” with an aggregate term not to exceed 10 years, yielding 40 percent and 26.7 percent equity interests in these joint ventures.⁹⁰ Both joint ventures are also involved in upgrading port facilities and planning and building surrounding industrial zones.⁹¹ According to CMPort, these ventures initially invested \$12.3 million in the two Free Trade Zone joint ventures.⁹² Then, in January 2019, CMPort and two other CMG subsidiaries (China Merchants Investments Limited and Cheer Signal) announced they would inject an additional \$30 million in capital.⁹³

The Free Trade Zone is divided into four “industrial clusters.” One is focused on the logistics industry and will support provision of transport, bonded warehousing, logistics and distribution capabilities. Another will focus on “business industry” functions, such as bulk goods transactions, merchandise display, and duty-free retail. A third cluster will focus on the “business support” sector and cater to financial services, information services, hotels, office buildings, and training. Finally, a manufacturing cluster will support packaging, light processing of raw materials, food processing, and auto parts assembly.⁹⁴ The idea, in short, is to generate trade to enable the port to prosper.

The Djibouti International Free Trade Zone remains in early Phase I and no major facilities or operating industrial sites appear to have been constructed.⁹⁵ However, 21 companies are reported to have signed agreements to operate in the zone.⁹⁶ Prior to its limited opening, energetic promotion of business opportunities was underway in China, with Djiboutian officials and Chinese executives touting the convenience and market access that the unfinished zone is to support.⁹⁷ The Chairman of

at: 吉布提自贸区推介会材料 [“Djibouti Free Trade Zone Promotion Conference Materials”], 丝路亿商 – 项目简介 [Silk Road E-Merchants—Project Profile],

http://www.eportalliance.com/resources/frontend/down/INTRODUCTION_DJ.pdf, (Accessed August 29, 2019); Details about company can be found at: <http://www.eportalliance.com/en/about.html#profile>.

⁹⁰ 招商局港口控股有限公司 [China Merchants Ports Holdings Company Limited], “Annual Report 2017,” 2018, <http://www.cmport.com.hk/UpFiles/bpic/2018-04/20180426042934273.pdf>, pp. 4, 89.

⁹¹ 非洲吉布提多哈雷多功能港口正式开港 [“Djibouti’s Doraleh Multipurpose Port Formally Opens in Africa”], 中国一带一路网 [One Belt One Road Web Portal], May 25, 2017, <https://www.yidaiyilu.gov.cn/xwzx/pjdt/14581.htm#p=undefined>; 吉布提多哈雷多功能港首航船靠泊 [“First Ship Berthing at Djibouti’s Doraleh Multipurpose Port”], 招商局港口 [China Merchants Ports], April 24, 2017, <http://www.cmzd.com/xwzx/info.aspx?itemid=2396>.

⁹² China Merchants Port Holdings Company Limited, “Annual Report 2016,” <http://www.cmport.com.hk/UpFiles/bpic/2017-04/20170427050724234.pdf>, p. 18; China Merchants Port Holding Company Limited, “Annual Report 2017,” <http://www.cmport.com.hk/UpFiles/bpic/2018-04/20180426042934273.pdf>, p. 87.

⁹³ China Merchants Port Holdings Company Limited, “Annual Report 2016,” p. 199.

⁹⁴ Katherine Si, “China Merchants Port to Increase Investment in Djibouti Joint Venture,” *Voice of Djibouti*, January 23, 2019, <http://voiceofdjibouti.com/china-merchants-port-to-increase-investment-in-djibouti-joint-venture/>. For an explanation of the ownership structure of the joint ventures, see “CMPort Formed Two Joint Ventures in Connection with Investment in the Djibouti International Free Trade Zone,” China Merchants Port Holdings Company Limited, January 17, 2017, <http://www.cmport.com.hk/enTouch/news/Detail.aspx?id=10007165>.

⁹⁵ Djibouti Ports & Free Zones Authority, “Djibouti International Free Trade Zone,” <http://dpfza.gov.dj/facilities/diftz> (accessed March 17, 2019).

⁹⁶ Based on open-source satellite imagery, accessed March 2020.

⁹⁷ Edith Mutethya, “Djibouti launches China-built free trade zone,” *China Daily*, July 6, 2018, <http://www.chinadaily.com.cn/a/201807/06/WS5b3f03d0a310334914e12a9.html>.

⁹⁸ For example, the free trade zone hosted conferences in Guangzhou to promote business opportunities in 2015. See: 吉布提自贸区广州论坛: 吉布提, 您进入非洲市场的最佳门户 [“Djibouti Free Zone Guangzhou Forum: Djibouti, Your Best Gateway to the African Market”], 境外投资 [External Investment], December 7, 2015, <https://www.chinainvestin.com/index.php/en/china-offshore/opinions/2935>.

Djibouti Ports and Free Zones Authority stated in 2017 that the zone would become a flourishing business district “in the next few years,” and other officials have said the port can be expected to handle \$7 billion in trade during its first two years.⁹⁸ The business operations have not yet met expectations, but the infrastructure to support such development is increasingly intact.

Inland Transport Infrastructure

Chinese firms have plans to develop extensive infrastructure to connect Djibouti’s ports to key elements of the Ethiopian economy. This emerging transport network is fundamental to the long-term viability of Chinese investments in the Djibouti ports and free trade zone. These include rail, road, and pipeline networks extending westward to Ethiopia’s capital, Addis Ababa, and southward to Ethiopian oil and gas fields, principally the Ogaden Basin. Some infrastructure has been constructed and put into operation, but much remains uncompleted.

Railroads

The Addis Ababa–Djibouti Railway is the flagship component of China’s push to connect Djibouti with the Ethiopian economy. China Railway Group (CRG) and China Civil Engineering Construction Corporation (CCECC) built the railway connecting the Ethiopian capital to Djibouti between 2011 and 2016.⁹⁹ Exim Bank furnished 70 percent of the capital for the Ethiopia segment of the line (\$2.4 billion out of the total \$3.4 billion). The remaining 30 percent was funded by the Ethiopian Government.¹⁰⁰ Fifteen percent of the Djibouti section, costing \$578 million, was funded by the Djibouti government, with the rest financed by Chinese banks.¹⁰¹ The 756 km rail project officially started commercial operations in January 2018, allowing freight transport from Djibouti’s port to the Ethiopian capital.¹⁰² Some 90 percent of the total activity at Djibouti’s ports is Ethiopian import or export trade.¹⁰³

This new railway connecting Ethiopia and Djibouti represents the first major project of this type since the French built a rail line in the 1890s. It is also the first fully electrified rail on the African continent and the first outside China to use exclusively Chinese standards.¹⁰⁴ It will reduce the travel time for cargo from three days for trucking to less than 10 hours, and is projected to eventually carry

⁹⁸ Ibid.; Abdourahim Arteh, “Djibouti breaks ground on massive Chinese-backed free trade zone,” *Reuters*, January 16, 2017, <https://www.reuters.com/article/china-djibouti/djibouti-breaks-ground-on-massive-chinese-backed-free-trade-zone-idUSL4N1F649H>.

⁹⁹ “IMF Staff Concludes the 2018 Article IV Consultation Mission in Djibouti,” IMF Press Release No. 18/486, December 19, 2018, <https://www.imf.org/en/News/Articles/2018/12/19/pr18486-djibouti-imf-staff-concludes-the-2018-article-iv-consultation-mission>, p. 22. Midway through the process, the government of Djibouti contracted with Exim Bank for an additional loan of \$490 million (85 percent of the total) for continued work on the standard-gauge electrified railway.

¹⁰⁰ “The Djibouti City-Addis Ababa Transit and Transport Corridor—Turning Diagnostics Into Action,” United Nations, 2018, New York and Geneva, p. 5, https://unctad.org/en/PublicationsLibrary/alde2018d6_en.pdf.

¹⁰¹ “Foreign Investment Cooperation Country (Region) Guide—Djibouti—2018 Edition,” pp. 15; 21.

¹⁰² “Chinese-built Ethiopia-Djibouti railway begins commercial operations,” *Xinhua*, January 1, 2018, http://www.xinhuanet.com/english/2018-01/01/c_136865306.htm.

¹⁰³ 对外投资合作国别（地区）指南 - 埃塞俄比亚 [“Country (Region) Guide for Foreign Investment Cooperation - Ethiopia”], 商务部 [PRC Ministry of Commerce], 2019, p. 25, <http://www.mofcom.gov.cn/dl/gbdqzn/upload/aisaiebiya.pdf>.

¹⁰⁴ 从坦赞铁路到亚吉铁路：中国基建与非洲经济走向共赢 [“From Tanzania-Zambia Railway to Addis-Djibouti: China’s Infrastructure and Africa’s Economy Going For Win-Win”], 贸易救济调查局 [Trade Remedy and Investigation Bureau], May 15, 2017, <http://trb.mofcom.gov.cn/article/zuixindt/201705/20170502574877.shtml>.

8.5 million tons of freight annually.¹⁰⁵ CRG and CCECC inked a 6-year contract to operate the railway in 2015, but encountered a variety of obstacles, from electricity outages to cattle collisions. Sinasure, the central state-owned Chinese insurance firm, wrote off \$1 billion in losses on the project and Exim Bank halted funding to construct a second track.¹⁰⁶ Nonetheless, Chinese firms anticipate the railroad's freight capacity will expand after Chinese firms build an additional 1,500 miles of rail line in Ethiopia.¹⁰⁷

Recent reports confirm that the final sections of rail connections to the Doraleh Container Terminal and Multipurpose Port are now completed.¹⁰⁸ Precise figures are not available regarding how much cargo is still being trucked or conveyed by new railway. However, according to one report, the railway was heavily used over the summer of 2019 to ship approximately 70,000 tons of fertilizer from Djibouti's ports to Ethiopia.¹⁰⁹ The report indicated 75 freight trucks would have been required to move the equivalent of a single train trip. Rapid delivery of more fertilizer is reportedly a boon to Ethiopian farm productivity—especially cotton cultivation, which helps feed its budding textile industry.¹¹⁰

Some progress has been made on connecting the new railway to the northern areas of Ethiopia. A Chinese-built industrial park in Kombolcha, a city in Ethiopia's northern Amhara State, will soon be connected to the rest of Ethiopia's national rail network and, through it, to Djibouti.¹¹¹ The first phase of the Awash-Woldiya Railway, contracted to the Turkish firm Yapi Merkezi, runs from Awash to Kombolcha and is currently being finalized. At 97 percent completion, the line will likely be

¹⁰⁵ "Chinese-built Ethiopia-Djibouti railway wins acclaim for driving Ethiopia's import-export needs," *Xinhua*, July 24, 2019, http://www.xinhuanet.com/english/2019-07/24/c_138251826.htm; "Railway development in Ethiopia," Embassy of Ethiopia in Brussels, January 6, 2017, <https://ethiopianembassy.be/en/2017/01/06/railway-development-in-ethiopia/>

¹⁰⁶ Yunnan Chen, "Ethiopia and Kenya are Struggling to Manage Debt for their Chinese-built Railways," *Quartz Africa*, June 4, 2019, <https://qz.com/africa/1634659/ethiopia-kenya-struggle-with-chinese-debt-over-sgr-railways/>

¹⁰⁷ China Public Private Partnerships Center (CPPPC – Ministry of Finance): <http://www.cpppc.org/zh/ydylal/5269.jhtml>; see also this explanation from a Chinese project manager: "From Tanzania-Zambia Railway to Addis-Djibouti: China's Infrastructure and Africa's Economy Going For Win-Win."

¹⁰⁸ 埃塞拟通过亚吉铁路运输化肥 ["Ethiopia Plans to Transport Fertilizer through Ethiopia-Djibouti Railway"], 驻埃塞俄比亚使馆经商处 [Economy and Commercial Office of the PRC Embassy in Ethiopia], November 10, 2019, <http://et.mofcom.gov.cn/article/jmxw/201911/20191102915422.shtml>; 声音: '一带一路' 合作符合世界各国发展利益 ["Voice: Belt and Road Cooperation is in Line with Development Interest of Countries Around the World"], 人民日报 [People's Daily], April 8, 2019, <http://news.cctv.com/2019/04/08/ARTI7VkPZfKoiERdkLibikIV190408.shtml>; "Foreign Investment Cooperation Country (Region) Guide—Djibouti—2018 Edition," p. 17.

¹⁰⁹ "Chinese-built Ethiopia-Djibouti Railway Wins Acclaim for Driving Ethiopia's Import-Export Needs," *Global Times*, August 2, 2019, <http://english.mofcom.gov.cn/article/newsrelease/counseloroffice/westernasiaandaficareport/201908/20190802887221.shtml>.

¹¹⁰ Aaron Maasho, "Ethiopia Bets on Clothes to Fashion Industrial Future," *Reuters*, November 21, 2017, <https://af.reuters.com/article/africaTech/idAFKBNIDL1WH-OZATP>.

¹¹¹ "Chinese Built Industrial Park to Start Operation in Northern Ethiopia," *Xinhua*, December 7, 2017, http://www.xinhuanet.com/english/2017-12/07/c_136806571.htm.

electrified and in operation sometime this year.¹¹² Official reporting from the PRC Ministry of Commerce indicates that in the north, the Mekele-Tadjourah rail line remains at the proposal stage.¹¹³

These developments are exceptions, however, and the Ethiopian logistics sector largely lags behind projected requirements. The state-owned Ethiopian Shipping & Logistics Services Enterprise monopolizes the multi-modal transport system from Djibouti to Ethiopian regions. The system is inefficient and expensive, which stymies Ethiopia's import and export sectors. According to some studies, restrictive licensing practices have further increased shipping costs by 30-50 percent.¹¹⁴ Currently the main railway is only used by a few big export companies because of high rail-rates relative to trucking and the lack of branch lines to Ethiopian depots and industrial zones.¹¹⁵ This could change, as the rail line has recently completed its connection to the Doraleh Multipurpose Port in Djibouti.¹¹⁶ The lack of rail service to Tadjourah port further limits Ethiopia's development.¹¹⁷

Highways

While the growing rail capacity will eventually supplant some trucking, there remains high demand for roads connecting Djibouti's ports to inland markets. Road construction, however, lags even rail development. Some Ethiopian analysts suggest this is purposeful to encourage increased use of the rail line, allowing Ethiopian railways to reduce debt incurred by such rapid expansion.¹¹⁸

The primary roadway connecting Djibouti to Ethiopia is Djibouti's *route nationale* (RN-1), which runs from the capital to Galafi, through Awash, and on to Addis Ababa. Approximately 1,000 trucks move along the road per day, carrying mostly fuel and other liquid bulk.¹¹⁹ Some sections of this road are so severely degraded the actual paved roads are untraversable and trucks are forced to create bypasses across stretches of the desert.¹²⁰ China's Exim Bank provided financing for Ethiopia's first modern highway from Addis Ababa to Adama, which in 2014 linked the capital to Mojo dry port,

¹¹² "Project Overview," AKH Railway Project, <http://www.akhrailway.com/>, (Accessed August 29, 2019); "ERC Finalizing Awash-Kombolcha Railway Project," *Ethiopian Press Agency*, January 31, 2019, <https://www.press.et/english/?p=2017#>.

¹¹³ 对外投资合作国别（地区）指南 吉布提（2019 版）["Foreign Investment Cooperation Country (Region) Guide – Djibouti – 2019 Edition"], PRC Ministry of Commerce, 2019, p. 18, <http://images.sh-etc.net/202001/20200113134901375.pdf>.

¹¹⁴ Tom Gardner, "Ethiopia Opens Up Budding Logistics Sector," *The Africa Report*, March 20, 2019, <https://www.theafricareport.com/10463/ethiopia-opens-up-budding-logistics-sector/>.

¹¹⁵ *Ibid.*

¹¹⁶ "Ethiopia Plans to Transport Fertilizer through Ethiopia-Djibouti Railway."

¹¹⁷ Ethiopia has been constructing a rail line connecting to the Addis-Djibouti railway that runs northward from Awash to Woldiya as part of the nation's long-term railway infrastructure development plan. Fasika Tadesse, "Semera-Tadjoura Railway Tender Postponed Again for the Fifth Time," *Addis Fortune*, January 26, 2015, <https://addisfortune.net/articles/semera-tadjoura-railway-tender-postponed-again-for-the-fifth-time/>; 湖北宝业乔迁新址, 再次喜获(国优)鲁班殊荣 ["Hubei Baoye Moved to a New Location and Once Again Won the (National Best) Luban Award"], 集团新闻综合办公室 [Group News Comprehensive Office], February 22, 2019, <http://www.baoyehb.com/webFrontNews/show?id=43263b13-77d9-4037-bafc-9ddc7f39f3d8>.

¹¹⁸ Yohannes Anberbir, "Running Out of Steam," *The Reporter Ethiopia*, January 28, 2017, <http://www.thereporterethiopia.com/content/running-out-steam>.

¹¹⁹ "The Djibouti City-Addis Ababa Transit and Transport Corridor – Turning Diagnostics Into Action," United Nations, 2018, New York and Geneva, p. 5, https://unctad.org/en/PublicationsLibrary/aldc2018d6_en.pdf.

¹¹⁹ "Foreign Investment Cooperation Country (Region) Guide—Djibouti—2018 Edition," p. 3.

¹²⁰ *Ibid.*, p. 4.

one of the areas where Chinese companies have constructed an industrial park.¹²¹ Other Chinese-led road projects are also organized around industrial parks in the region. Running from Mojo dry port southeast of Addis Ababa to the flagship industrial park in Hawassa, the Hawassa Expressway is set to be completed in late 2020.¹²² China's Exim Bank is financing the fourth phase of this project, which will be built between Negele and Hawassa.¹²³ Increased traffic from industrial development is creating demand for improved routes, which could lead to enhanced trucking capacity to the rest of Ethiopia and Djibouti's ports.

Pipelines

Running parallel to the Addis Ababa-Djibouti railway is a Chinese-financed water pipeline, another infrastructure project vital to allowing the "Shekou Model" to take root in arid Djibouti. Since June 2017, the water pipeline has transported groundwater pumped from wells in Ethiopia to Djibouti's key towns of Ali-Sabieh, Dikhil, Arta and the capital, Djibouti, some 320 km away.¹²⁴ Djibouti's ability to develop into an industrial and trading hub requires a stable and sufficient water source to support a growing population and sustain economic activity, even in periods of drought. Once fully operational, the pipeline should provide 100,000 m³ of water per day.¹²⁵ Some 95 percent of the capital for the \$340 million project was provided through concessional Exim Bank loans with a seven-year grace period and a 2 percent interest rate.¹²⁶

A key aspect of China's strategic and commercial interest in the Horn of Africa is the potential for oil and gas development in the Ogaden Basin, located in southeastern Ethiopia along its undefined border with Somalia. Chinese energy developer Poly-GCL signed an agreement with the Djibouti Government in 2013 to invest \$4 billion to build a natural gas pipeline and additional port and other facilities for gas exports. If the pipeline is completed, Ethiopian natural gas would travel from the Ogaden Basin to the port of Damerjog, southeast of the Djiboutian capital (see Image 2, above).¹²⁷

¹²¹ This highway reportedly uses Chinese standards of highway construction with six-lanes, thereby reducing the time between these points from 2.5 hours to 45 minutes. See: 走进非洲 – 进出口银行的埃塞俄比亚足迹 ["Enter Africa—The Export-Import Bank's Presence in Ethiopia"], 中国进出口银行 [The Export-Import Bank of China], http://www.eximbank.gov.cn/info/ztzl/fzzt/fzxm/201810/t20181012_6937.html, (Accessed August 29, 2019).

¹²² "Ethiopia–Modjo-Hawassa Highway Project—Phase 1," African Development Bank Group—Data Portal, July 25, 2019, <https://projectsportal.afdb.org/dataportal/VProject/show/P-ET-DB0-018>; "Modjo-Hawassa Expressway to See Completion in Three Years," *Ethiopian Press Agency*, February 8, 2019, <https://www.press.et/english/?p=2296#>.

¹²³ 中国经济网: 进出口银行与埃塞俄比亚签署优惠出口买方信贷贷款协议 ["China Economic Net: Export Import Bank and Ethiopia Sign Preferential Export Buyer Credit Loan Agreement"], 中国进出口银行 [The Export-Import Bank of China], May 17, 2017, http://www.eximbank.gov.cn/info/circus/201806/t20180610_3509.html.

¹²⁴ "Ethio-Djibouti Water Pipeline Inaugurated," *Capital Ethiopia*, July 7, 2017, <http://capitalethiopia.com/2017/07/07/ethio-djibouti-water-pipeline-inaugurated-salt-port-opens-business/>.

¹²⁵ Addis Getachew Tadesse, "Djibouti to Drink Ethiopian Water for Free: Ambassador," *Anadolu Agency*, December 4, 2017, <https://www.aa.com.tr/en/africa/djibouti-to-drink-ethiopian-water-for-free-ambassador/989462>.

¹²⁶ "China funds cross-border water project in Djibouti, Ethiopia," *AIDDATA*, <http://china.aiddata.org/projects/30888>, see also IMF report p. 3. Regarding Exim Bank's \$1.1bn loan portfolio in Djibouti, the IMF further reports that "[t]he average grant element on new external borrowing (disbursements) is expected to reach 36 percent in 2016, reflecting low international interest rates and generous terms, in particular on the large water pipeline project, but is expected to gradually decline to 12 percent by 2023 in line with the assumption of tightening financing terms for Djibouti in the longer term." See International Monetary Fund, "Staff Report for the 2016 Article IV Consultation—Debt Sustainability Analysis," February 7, 2017, <https://www.imf.org/external/pubs/ft/dsa/pdf/2017/dsacr1787.pdf>, p. 3.

¹²⁷ 埃塞俄比亚和吉布提签署建设天然气管道协议 ["Ethiopia and Djibouti Sign Natural Gas Pipeline Construction Agreement"], February 19, 2019, http://www.sinopecnews.com.cn/news/content/2019-02/19/content_1734881.htm.

There is currently no indication construction of the pipeline has begun despite official Ethiopian projections that production would start in 2020.¹²⁸

Despite some obstacles, China's investment and construction have driven major improvement to Djibouti's infrastructure and its logistical capacity to support the development of the regional economies of the Horn of Africa. According to the World Bank's Logistics Performance Index (LPI) for international trade, Djibouti shot up in the world rankings from 134th in 2014, to 90th in 2018.¹²⁹ However, the long-term utility of this improved transport connectivity will depend on the strength of inland markets and resources.

Inland Markets and Resources

Chinese investments in port and intermodal infrastructure in Djibouti are premised on the theory that the inland markets and resources of eastern Africa will make the projects economically viable. Djibouti itself has a GDP of only \$2.96 billion (in current USD), albeit growing at 5.5 percent as of 2018.¹³⁰ The small nation has an estimated population of slightly less than a million people, some 75 percent of whom live in the capital.¹³¹ Services compose 76.1 percent of Djibouti's GDP, most of which can be attributed to freight forwarding to and from the country's ports.¹³² It has little to offer world markets other than its strategic location and its capacity to connect to other, more substantial, economies in the region.

Demographics

Without other economies in tow, it would be untenable to tether major economic investment to such a slender demographic profile. However, the Horn of Africa contains almost 130 million people, with over half the population of each nation under the age of 24 years.¹³³ As Horn of Africa economies go, Ethiopia is the main prize. It has a much larger population base (nearly 110 million, second after Nigeria on the continent) that is growing at nearly three percent a year (11th fastest in the world).¹³⁴ Over 80 percent of that large and growing population lives in rural areas and some 65 percent of the population is 24 years old or younger.¹³⁵ According to the IMF, Ethiopia's GDP in 2018 was \$85.36 billion. It grew at nine percent in 2018/2019, making it the fastest growing economy in the region.¹³⁶ Despite very low per capita income (\$790), it is expected to sustain high growth rates into the 2020s.¹³⁷ From the Chinese perspective, conditions are ripe in Ethiopia for the kind of economic

¹²⁸ Ibid.

¹²⁹ "International LPI," The World Bank, 2018, <https://lpi.worldbank.org/international/global/2018?sort=asc&order=Infrastructure#datatable>.

¹³⁰ World Bank, "Djibouti Country Profile," *World Development Indicators Database*, https://databank.worldbank.org/views/reports/reportwidget.aspx?Report_Name=CountryProfile&Id=b450fd57&tbar=y&d=y&inf=n&zm=n&country=DJI (accessed March 15, 2020).

¹³¹ "Djibouti," *The World Bank—Data*, <https://data.worldbank.org/country/djibouti> (accessed March 15, 2020).

¹³² "Djibouti," *CIA World Factbook*, <https://www.cia.gov/library/publications/the-world-factbook/geos/dj.html> (accessed March 15, 2020).

¹³³ Figures located in each country profile (Ethiopia, Djibouti, Eritrea, and Somalia) of the *CIA World Factbook*, <https://www.cia.gov/library/publications/the-world-factbook/>.

¹³⁴ The World Bank, "Ethiopia: Country Profile," *World Bank Development Indicators Database*, https://databank.worldbank.org/views/reports/reportwidget.aspx?Report_Name=CountryProfile&Id=b450fd57&tbar=y&d=y&inf=n&zm=n&country=ETH (accessed March 15, 2020).

¹³⁵ "Ethiopia" *The CIA World Factbook*, <https://www.cia.gov/library/publications/the-world-factbook/geos/et.html>.

¹³⁶ World Bank, "Ethiopia: Country Profile."

¹³⁷ International Monetary Fund, "The Federal Democratic Republic of Ethiopia," *IMF Country Report*, No. 20/29, January 2020, <https://www.imf.org/en/Publications/CR/Issues/2020/01/28/The-Federal-Democratic-Republic-of-Ethiopia-2019-Article-IV-Consultation-and-Requests-for-48987>.

development enjoyed in the PRC during its reform and opening period. Some Chinese analysts consider it “China in Africa” and believe the Chinese model is uniquely suited to its demographic and economic conditions.¹³⁸

China’s investments in Djibouti will likely succeed or fail on the strength of Ethiopia’s markets and resources. Given that Ethiopia, as a land-locked state, relies on Djibouti’s infrastructure for its own prosperity, this bet may pay off over time. The PRC Ministry of Commerce reported that “Africa’s young population, low labor costs, coupled with low raw material and energy costs, as well as tariff preferences given to African countries by the European Union and the United States” make Ethiopia in particular “one of the most promising destinations” for Chinese capital.¹³⁹

Reflecting its own vested interest in this, Ethiopia agreed in 2018 to take a stake in the Port of Djibouti after Djibouti terminated the DPWorld contract.¹⁴⁰ Recognizing its over-reliance on Djiboutian ports, Ethiopia is seeking to diversify its access to global markets, and recently undertook investments in other regional ports to expand its avenues of access to ocean transport. One such port is DPWorld-run Berbera in Somaliland, where Ethiopia took a 19 percent stake in a 30-year concession and also secured rights to develop a Berbera Corridor of links to Ethiopian markets.¹⁴¹ After reaching a peace deal in July 2018 with neighboring Eritrea, Ethiopia also began actively seeking to develop road and rail infrastructure and potentially port facilities in its northeastern neighbor to export potash.¹⁴²

Hydrocarbons

China invests in a range of high-profile projects in Ethiopia, including a signature effort to develop and connect the Ogaden’s Calub and Hilala gas fields in Southeast Ethiopia to liquid natural gas (LNG) facilities in the Port of Djibouti. China’s Poly-GCL Petroleum Group Holdings Ltd. began developing these fields after it signed a production sharing agreement with Ethiopia in 2013. It drilled its first appraisal well in the Calub field in September 2015, and produced the first barrel of oil in June 2018.¹⁴³ To date, no investors have attempted to export the Ogaden’s oil and gas resources.¹⁴⁴ However, in November 2017 China’s POLY-GCL Petroleum Group Holdings Ltd. signed a \$4 billion memorandum of understanding to build a natural gas pipeline, liquefaction plant,

¹³⁸ 唐晓阳 [Tang Xiaoyang], 埃塞俄比亚：复制中国模式？[“Ethiopia: Copying the Chinese Model?”], *Carnegie-Tsinghua Center*, August 29, 2014, <https://carnegietsinghua.org/2014/08/29/zh-pub-57083>.

¹³⁹ 吉布提国际自由贸易区：打造“一带一路”在非建设支点 [“Djibouti International Free Trade Zone: Building the Belt and Road Initiative in Africa”], 中华人民共和国商务部 [PRC Ministry of Commerce], October 29, 2018, <http://www.mofcom.gov.cn/article/i/dxfw/gzdz/201810/20181002800804.shtml>.

¹⁴⁰ Aaron Maasho, “Ethiopia to take stake in Port of Djibouti, its trade gateway – state media,” *Reuters*, May 1, 2018, <https://www.reuters.com/article/ethiopia-djibouti/ethiopia-to-take-stake-in-port-of-djibouti-its-trade-gateway-state-media-idUSL8N1S81QA>.

¹⁴¹ “Ethiopia acquires 19% stake in DP World Berbera Port,” *Gulf News*, March 1, 2018, <https://gulfnews.com/business/ethiopia-acquires-19-stake-in-dp-world-berbera-port-1.2181403>.

¹⁴² Nizar Manek, “Eritrea Mulls Port as Ethiopia Rapprochement Spurs Investors,” *Bloomberg*, August 23, 2018, <https://www.bloomberg.com/news/articles/2018-08-23/eritrea-mulls-new-port-as-ethiopia-rapprochement-spurs-investors>.

¹⁴³ 第一井开钻 埃塞油气步入准投产时代 [“The First Well Drilled and Ethiopian Oil and Gas Enters the Era of Quasi-Production”], 埃塞油气 [Ethiopian Oil and Gas], September 9, 2015, <https://eip.gcl-power.com:9090/apps/news/layouts/15/EIP.MobilePortal/DisplayForm.aspx?newsId=O1-T0-936&uu=&kk=>; 中企为埃塞产出第一桶原油 [“Chinese Enterprises Produces First Barrel of Oil in Ethiopia”], 人民网 [People’s Daily Online], June 28, 2018, <http://world.people.com.cn/n1/2018/0628/c1002-30094502.html>.

¹⁴⁴ Kaleyesus Bekele, “Oil in Ogaden,” *The Reporter*, March 24, 2018, <https://www.thereporterethiopia.com/article/oil-ogaden>.

and export terminal in Damerjog, Djibouti.¹⁴⁵ The pipeline is projected to transport 12 billion cubic meters of natural gas a year from Ethiopia to Djibouti, of which 10 million cubic meters is expected to be exported to China.¹⁴⁶

China is not a stranger to this hydrocarbon-producing region of Ethiopia. In 2007, workers from Zhongyuan Petroleum Exploration Bureau working in an oil field in the Ogaden region came under attack by 200 armed Somali separatists from the Ogaden National Liberation Front. Nine Chinese nationals and 65 Ethiopian employees were killed and another seven Chinese workers were abducted and later recovered by the Ethiopian Government.¹⁴⁷ The Ogaden is home to ethnic Somalis and the border in the region remains disputed between Somalia and Ethiopia. Despite previous conflict in the area,¹⁴⁸ peace deals were signed between the Ethiopian Government and local separatists in 2010¹⁴⁹ and again in October 2018.¹⁵⁰ If the more recent deal holds, stability in the Ogaden would bode well for Chinese energy development there.

Industrial Parks

Chinese investors have launched a number of industrial parks throughout Ethiopia to leverage new logistical capabilities as infrastructure development emerges. The resources and labor are abundant, but “what Africa lacks is precisely the supporting infrastructure and industrial parks,” according to a PRC Ministry of Commerce report.¹⁵¹ Echoing China’s “Shekou Model,” talk of an “Ethiopia Model” swirls in Chinese business reporting. The plan entails “national investment, Chinese construction, [Chinese] management for three years, and promoting this across all of Ethiopia,” according to Ethiopia Industrial Parks Development Corporation President Sisay Gemechu.¹⁵²

The flagship model industrial park is at Hawassah, and it focuses on the textile and apparel industries. Completed by the CCECC in July 2016, it is operated on a three-year lease by the PRC firm Kunshan Economic and Technological Development Zone, during which time it is training

¹⁴⁵ Abdourahim Arteh, “Djibouti signs preliminary deal with China’s POLY-GCL for \$4bln gas project,” *Reuters*, November 16, 2017, <https://www.reuters.com/article/china-djibouti-gas/djibouti-signs-preliminary-deal-with-chinas-poly-gcl-for-4-bln-gas-project-idUSL8N1NM2BV>.

¹⁴⁶ 中国，埃塞俄比亚，和吉布提将联合启动天然气输送项目 [“China, Ethiopia, and Djibouti Will Work Together to Begin a Natural Gas Transportation Project”], 中非合作网 [China-Africa Cooperation Net], July 28, 2016, <http://www.zfhz.org/plus/view.php?aid=14725>.

¹⁴⁷ “9 Chinese Workers Killed in Ethiopia,” *China Daily*, April 24, 2007, http://www.chinadaily.com.cn/china/2007-04/24/content_858956.htm; 中资公司埃塞遭袭事件 9 名遇难者遗体运抵郑州 [“Remains of the 9 Victims of a Chinese Company Attacked in Ethiopia Delivered to Zhengzhou”], 新华网 [Xinhua], April 30, 2007, <http://news.sina.com.cn/c/p/2007-04-30/040112899262.shtml>.

¹⁴⁸ “The Rise and Fall of the Somali State,” *Stratfor*, December 8, 2016, <https://worldview.stratfor.com/article/rise-and-fall-somali-state#/home/error>.

¹⁴⁹ “68. Ethiopia/Ogaden (1948-present),” University of Central Arkansas, <https://uca.edu/politicalscience/dadm-project/sub-saharan-africa-region/69-ethiopiaogaden-1948-present/>.

¹⁵⁰ Aaron Maasho, “Ethiopia Signs Peace Deal with Rebels from Gas-rich Region,” *Reuters*, October 21, 2018, <https://www.reuters.com/article/us-ethiopia-politics/ethiopia-signs-peace-deal-with-rebels-from-gas-rich-region-idUSKCN1MV0YO>.

¹⁵¹ “Djibouti International Free Trade Zone: Building the Belt and Road Initiative in Africa.”

¹⁵² 埃塞首个国家工业园正式运营 [“Ethiopia’s First National Industrial Park Officially Opens”], 人民日报 [People’s Daily], June 21, 2017, <http://ydy1.people.com.cn/n1/2017/0621/c411837-29352829.html>.

Ethiopian managers.¹⁵³ Chinese investment in Hawassah and other industrial parks is motivated by the availability of resources close to the industrial plant. As one manufacturer put it,

Chinese textile companies are moving closer to their raw material base, the cotton producing countries such as Ethiopia. This is part of its value chain repositioning, a strategy most Chinese companies are adopting. Companies are also using Africa as a gateway to emerging markets on the continent and to the European market.¹⁵⁴

Investment in the industrial parks is not limited to Chinese firms, and the logic of locating production facilities near the source of essential resources is not lost on others in the manufacturing industry. PVH Corp, owner of the Tommy Hilfiger and Calvin Klein brands, moved some of its clothing manufacturing to Hawassah in 2016.¹⁵⁵ By 2017, at least 16 companies produced clothing at Hawassah. One such company, Hydra Mani, reportedly was exporting \$1 million of product a month.¹⁵⁶ Indeed, Ethiopia explicitly markets its industrial parks as an integrated solution “aimed at coordinated production along value chains,” by virtue of their locations “along key economic corridors” and connection to ports.¹⁵⁷

Ethiopia is also a highly valued location for major truck manufacturing companies, including the Africa branch of state-owned China National Heavy Duty Truck Group Co., Ltd. (Sinotruk). Its representative explained in 2017 that “Ethiopia is a strategic market for Sinotruk.” The company jointly runs an assembly plant in Addis Ababa with the Ethiopian manufacturing company N.A Metal Industry & Engineering Co, which Sinotruk touts as “an example of China-Africa production capacity cooperation.”¹⁵⁸

Ethiopia seeks to diversify its exports beyond textiles, currently its principal export. CCECC won a \$125 million bid in May 2016 to assist this effort by constructing Adama Industrial Park focused on manufacturing heavy machinery.¹⁵⁹ After Hunan provincial officials announced a joint venture with Ethiopia during the May 2017 Belt and Road Forum, this became the first industrial park developed by a PRC provincial government.¹⁶⁰ With government support in place, Sany Group and other

¹⁵³ 中国公司承建埃塞首个国家工业园正式运营 [“Chinese Company Builds Ethiopia's First National Industrial Park”], 国务院新闻办公室网站 [PRC State Council Information Office], June 21, 2017, <http://www.scio.gov.cn/31773/35507/35510/35524/Document/1555651/1555651.htm>.

¹⁵⁴ “AGOA: Just 1 Reason Why China Loves Manufacturing in Ethiopia,” *Africa Insider*, April 16, 2017, <http://afkinsider.com/138881/agoa-just-1-reason-why-china-loves-manufacturing-in-ethiopia/>.

¹⁵⁵ Matthew Newsome, “PVH prepares for Ethiopia production,” *Just-Style*, May 6, 2016, https://www.just-style.com/news/pvh-prepares-for-ethiopia-production_id127781.aspx.

¹⁵⁶ Birhanu Fikade, “PVH et al begin export from Hawassa Industrial Park,” *The Reporter*, June 3, 2017, <https://www.thereporterethiopia.com/content/pvh-et-al-begin-export-hawassa-industrial-park>.

¹⁵⁷ “Extensive development of industrial parks,” *Ethiopian Investment Commission*, <http://www.investethiopia.gov.et/investment-opportunities/strategic-sectors/industry-zone-development>.

¹⁵⁸ 中国重汽埃塞俄比亚组装厂开业 助推中非产能合作 [“China’s Sinotruk Ethiopia Assembly Plant Opens, Boosts China-Africa Production Capacity Cooperation”], 中国日报山东 [*China Daily Shandong*], November 26, 2017, http://sd.chinadaily.com.cn/2017-11/26/content_35023001.htm.

¹⁵⁹ 中土集团承建的埃塞俄比亚工业园介绍 [“Introduction to CCECC’s Under-Contract Industrial Parks in Ethiopia”], 中非贸易研究中心 [*China-Africa Trade Research Center*], January 11, 2017, <http://news.afrindex.com/zixun/article8278.html>; “Ethiopia to inaugurate 2 Chinese built industrial parks,” *Xinhua*, July 11, 2017, http://news.xinhuanet.com/english/2017-07/11/c_136433206.htm.

¹⁶⁰ 埃塞俄比亚湖南工业园 湘企借“一带一路”抱团出海 [“Ethiopia’s Hunan Industrial Park, Hunan Enterprises Use the ‘Belt and Road’ to Go Abroad Together”], 湖南省人民政府门户网站 [Hunan Provincial People’s Government Portal], January 19, 2018, http://www.hunan.gov.cn/topic/kfjq/zxbd1/201801/t20180119_4928872.html.

Chinese manufacturers quickly signed MOUs to produce construction machinery, wind energy equipment, automobile parts, and other equipment there.¹⁶¹

Chinese promoters now pair the “Shekou Model” and the “Ethiopia Model” as a composite “Ethiopia-Djibouti Model” for regional development. This model, of course, relies largely on Chinese labor, capital, and expertise. According to the Deputy Director of the China Enterprise Reform and Development Society (a body under the State Council’s State-Owned Assets Supervision and Administration that supervises central SOEs), the model envisions increasing roles for Chinese enterprises in financing, design, construction, equipment and materials, and operational management.¹⁶² Ultimately, the purpose of this Ethiopia-Djibouti model is to form new international production chains to redistribute production capacity globally for the future transformation of the Chinese economy.¹⁶³



Image 4. The “Ethiopia-Djibouti Model”¹⁶⁴

¹⁶¹ “Ethiopia to inaugurate 2 Chinese built industrial parks,” *Xinhua*, July 11, 2017, http://news.xinhuanet.com/english/2017-07/11/c_136433206.htm.

¹⁶² 李锦 [Li Jin], 亚吉模式为“一带一路”建设提供新样本 [“Ethiopia-Djibouti Model Provides New Example for Belt and Road Construction”], 人民日报 [People’s Daily], October 11, 2016, <http://news.ifeng.com/50081349/news.shtml?&back>.

¹⁶³ Ibid.

¹⁶⁴ 袁立 [Yuan Li], 亚吉模式—“一带一路”的实践 [“Ethiopia-Djibouti Model: Practice of the ‘Belt and Road’”], 中国土木工程集团有限公司 [China Civil Engineering Construction Corporation], May 21, 2017, slide 32. The image comes from a China Civil Engineering Construction Corporation presentation and shows planned or under-construction industrial parks in Ethiopia. The red line is the Addis Ababa-Djibouti Railway and the blue dotted lines are planned railway routes. The industrial parks outlined in red are those built by this corporation. White are those built by other contractors and those in grey have not yet begun construction. English text and red highlights provided by authors.

Finance

Securing financing from China remains the first and most urgent priority if these projects are to be viable. Several Chinese banks have made concerted efforts to make capital available to firms working in far-flung locations.¹⁶⁵ One example is the Silk Road International Bank, established in Djibouti in November 2016.¹⁶⁶ This bank is a joint venture with the Djibouti Ministry of Finance, which funded 25 percent of the endeavor, and two Chinese companies—the IZP Group, which provided 25 percent of the funding, and the Silk Road E-Merchants Group, which provided 20 percent. It represents the first instance in which a Chinese commercial bank has obtained a banking license in Africa.¹⁶⁷ According to the Vice-Chairman of the Silk Road International Bank, the new venture “will provide a package of financial solutions for China-Africa bilateral trade and the investment of China in Africa, [and] provide safe and convenient payment and settlement service for numerous Chinese enterprises in Africa.”¹⁶⁸ The bank provides commercial and retail banking services to facilitate cross-border payments and enable Chinese firms to transact locally for much of their business operation in Africa.¹⁶⁹

The Silk Road International Bank also apparently performs a number of core functions for the government of Djibouti. The Chinese State Council Information Office reported that the bank “will primarily provide services for the Government of Djibouti’s revenue and expenditures, such as handl[ing] civil servant wage distribution, pension payments, and business taxes. It will also serve as the main bank for trade settlement and capital transactions for local Chinese enterprises.”¹⁷⁰ In effect, this bank, which is substantially controlled by Chinese entities, has taken over several of Djibouti’s treasury functions. There are plans to expand these financial services across the continent. One Chinese official stated the PRC is considering whether to establish a second African branch of the Silk Road International Bank in Togo.¹⁷¹

Chinese and African banks enjoy access to a variety of funding sources for their work on the continent. China has two funds for development in Africa: the China-Africa Development Fund, established 2006, and the China-Africa Industrial Capacity Cooperation Fund, announced by Xi Jinping during the Forum on China-Africa Cooperation (FOCAC) in Johannesburg in December 2015.¹⁷² The new Fund was officially registered in January 2016, when \$10 billion was made available for investment in African manufacturing, high-tech goods, energy, mining, infrastructure,

¹⁶⁵ Chen Yulu, “Writing a New Chapter in ‘Belt and Road’ Investment and Financing Cooperation.”

¹⁶⁶ 吉布提丝路国际银行正式成立 助力“一带一路”金融基础设施建设 [“The Djibouti Silk Road International Bank was Formally Established to Support the Construction of the Financial Infrastructure of the ‘Belt and Road’”], 国务院新闻办公室 [State Council Information Office], November 17, 2016, <http://www.scio.gov.cn/ztk/wh/slxxy/31208/Document/1519779/1519779.htm>.

¹⁶⁷ Gu Yang, “Silk Road International Bank set in Djibouti,” *Embassy of the People’s Republic of China in the Republic of South Africa*, December 29, 2016, <http://za.china-embassy.org/eng/znjl/t1427483.htm>.

¹⁶⁸ Ibid.

¹⁶⁹ “Chinese-funded Silkroad [sic] International Bank opens in Djibouti,” *China Daily*, January 19, 2017, http://www.chinadaily.com.cn/business/2017-01/19/content_27999949.htm.

¹⁷⁰ 吉布提丝路国际银行正式成立 助力“一带一路”金融基础设施建设 [“The Silk Road International Bank in Djibouti Officially Established, Will Assist in Financing One Belt One Road Infrastructure Investment Projects”], 国务院新闻办公室 [State Council Information Office], November 17, 2016, <http://www.scio.gov.cn/ztk/wh/slxxy/31208/Document/1519779/1519779.htm>.

¹⁷¹ Gu Yang, “Silk Road International Bank set in Djibouti.”

¹⁷² “China and Africa industrial capacity mode of cooperation,” *China Daily*, April 18, 2018, <http://www.chinadaily.com.cn/a/201804/18/WS5ad6a8c0a3105cdcf6518fe2.html>; “China-Africa Development Fund,” China Development Bank, <http://www.cdb.com.cn/English/ywgl/zhjryw/zffzjyxgs/>, (accessed March 25, 2020).

and finance. It enjoys the backing of the Exim Bank's foreign exchange reserves and Xi Jinping's imprimatur as a BRI-facilitating venture,¹⁷³ which enabled the Fund to participate in a \$60 billion aid package that specifically targeted the African market between 2016 and 2019.¹⁷⁴

Such initiatives give Chinese firms increased access to African markets and resources beyond the Djibouti-Ethiopia corridor. Continent-wide PRC efforts to court African leaders and businesses are ongoing. One such example is the construction of the African Union Headquarters building in Addis Ababa in 2012. This \$200m project was paid for entirely by the PRC government and was inaugurated by the Chairman of the Chinese People's Political Consultative Conference, Jia Qinglin.¹⁷⁵ The Chinese Minister of Foreign Affairs, Wang Yi, also spoke in June 2017 to African Union leaders to laud China's successes in east Africa and market them to other African states. China's growing influence on the continent allowed Wang Yi's pitch to extend beyond purely economic matters, touching on security cooperation and PRC military aid to African Union nations.¹⁷⁶ These military overtures mark a new direction in Chinese foreign policy, manifested most concretely in China's military presence in Djibouti.

Naval and Military Component

Djibouti's position astride major SLOCs at a critical chokepoint for global trade endows it with considerable strategic importance. Its proximity to ongoing conflicts in the Middle East and the presence of American, Japanese and European military forces on which the Chinese would like to keep tabs provide additional purposes for the PLA's presence. Still, China's decision to establish an overseas military facility in Djibouti marks a decisive break with many decades of vehement official disavowal that China would take this path.¹⁷⁷ China's former reluctance to establish an overseas military base reflected its broader foreign policy orientation, well-summarized in Deng Xiaoping's

¹⁷³ "China-Africa Industrial Capacity Cooperation Fund Starts Operation," Ministry of Foreign Affairs, January 27, 2016, <http://www.mfa.gov.cn/zflt/eng/jlydh/t1335472.htm>.

¹⁷⁴ Yao Jianing, "China-Africa industrial capacity cooperation fund starts operations," *Xinhua*, January 7, 2016, http://english.chinamil.com.cn/news-channels/2016-01/07/content_6848552.htm. A Brookings report notes that "the China-Africa Industrial Capacity Cooperation Fund...started operations in January 2016. However, after 18 months of formal operation, the fund only approved six projects with a total investment of \$542 million, among which only four received disbursed investment of \$248 million. According to its officials, the fund prioritizes risk management and mid- to short-term equity investment over speed and volume of investment. In particular, the fund cited the dropping investment in sub-Saharan Africa and the plummeting interests by Chinese companies due to the domestic economic slowdown as the key factors influencing the pace of the fund. At the current rate, the China-Africa Industrial Capacity Cooperation Fund is unlikely to achieve the goal of \$10 billion financing by the end of 2018. China might play the word game by pointing out that the capital is indeed disbursed to the fund, yet that hardly counts as funding provided to Africa." See: Yun Sun, "Foresight Africa Viewpoint—China's Engagement in Africa: What Can We Learn in 2018 From the \$60 Billion Commitment?," Brookings, January 30, 2018, <https://www.brookings.edu/blog/africa-in-focus/2018/01/30/foresight-africa-viewpoint-chinas-engagement-in-africa-what-can-we-learn-in-2018-from-the-60-billion-commitment/>.

¹⁷⁵ "China's top political advisor back home from Ethiopia," *China Daily*, February 1, 2012, http://cpcchina.chinadaily.com.cn/2012-02/01/content_14517833.htm; Kingsley Ighobor, "China in the heart of Africa," *Africa Renewal*, January 2013, <https://www.un.org/africarenewal/magazine/january-2013/china-heart-africa>.

¹⁷⁶ 王毅谈中国与东盟五个优先合作领域 ["Wang Yi Discusses the Top Five Areas for Cooperation in China-African Union Relations"], 中华人民共和国驻文莱达鲁萨兰国大使馆 [Embassy of the People's Republic of China in Negara Brunei Darussalam], June 21, 2017, <http://www.fmprc.gov.cn/ce/cebn/chn/zgxws/t1472160.htm>.

¹⁷⁷ For example, the 2000 National Defense White Paper plainly stated that China would not station forces or establish military bases overseas. See 2000 年中国的国防 [China's National Defense in 2000], 国务院新闻办公室 [Information Office of the State Council], October 16, 2000, <http://www.scio.gov.cn/zfbps/ndhf/2000/Document/307949/307949.htm>; The shadow of this longstanding policy is long. Chinese authorities have attempted to downplay its first overseas base, insisting that the facility is only for logistical, support, and humanitarian purposes. "Overseas Bases an Act of Responsibility," *South China Morning Post*, July 18, 2017, <https://www.scmp.com/comment/insight-opinion/article/2103014/overseas-bases-act-responsibility>.

admonition to keep a low profile and focus on developing China's economy, since China largely enjoys a secure international environment.¹⁷⁸ The base in Djibouti represents a stark break from Deng's policy line.

The functions and missions of the base are becoming clearer as it develops. PRC officials insist the facility is intended as a resupply base for the PLAN "anti-piracy task force" deployment to the Gulf of Aden and is not intended for further projection of military power.¹⁷⁹ However, official PRC media has also reported,

The base will ensure China's performance of [additional] missions, such as escorting, peace-keeping and humanitarian aid in Africa and west Asia.... will also be conducive to overseas tasks including military cooperation, joint exercises, evacuating and protecting overseas Chinese and emergency rescue, as well as jointly maintaining security of international strategic seaways.¹⁸⁰

Perhaps gradually unveiling the full extent of the base's role lessens the immediate impact of the strategic shift, but as then-PLAN commander ADM Wu Shengli stated in 2016 the base will clearly enable China's military to "carry out larger-scale missions in broader areas."¹⁸¹

Observations of China's recent operations in Djibouti (see below) further underscore the base's mission creep. The base marks a significant step toward a more global PLAN. At a minimum, these facilities will help the PRC provide security and emergency evacuation for Chinese nationals working in Africa and the large volume of Chinese investment on the continent provides powerful justification for positioning some security capacity in proximity to these expensive projects. This section examines the development, characteristics, and current utilization of the Djibouti base.

Base Development

The first reports of a PLA base in Djibouti emerged in 2013, when the PLA National Defense University drafted a study for the Central Military Commission promoting the idea.¹⁸² Xi Jinping approved the report and by February 2014 then-PRC Minister of Defense, Chang Wanquan, visited Djibouti to sign a "Security and Defense Partnership Agreement." The agreement allowed PLA access to Djibouti and offered Chinese support for the Djibouti armed forces. In November 2015, a high-level military delegation led by the Central Military Commission Chief of Staff General Fang Fenghui and PLAN Chief of Staff Admiral Qiu Yanpeng met with Djibouti President Guelleh to finalize details for the base.¹⁸³ Djiboutian Foreign Minister Mahamoud Ali Youssouf explained that China was given a 10-year lease at \$20 million per year, with an option for another 10-year

¹⁷⁸ 冷静观察、沉着应付、韬光养晦、决不当头、有所作为 ["Soberly Observe, Calmly Handle Problems, Keep a Low Profile, Never Take the Lead, Make a Difference"], *China Communist Party News*, October 28, 2012, <http://theory.people.com.cn/n/2012/1028/c350803-19412863.html>.

¹⁷⁹ "Commentary: China's Djibouti base not for military expansion," *Xinhua*, July 13, 2017, http://www.xinhuanet.com/english/2017-07/13/c_136441371.htm.

¹⁸⁰ Ben Blanchard, "China sends troops to open first overseas military base in Djibouti," *Reuters*, July 11, 2017, <https://www.reuters.com/article/us-china-djibouti/china-sends-troops-to-open-first-overseas-military-base-in-djibouti-idUSKBN19X049>.

¹⁸¹ 梁庆松, 王元元 [Liang Qingsong, Wang Yuanyuan], 海军召开亚丁湾护航 8 周年研讨会 ["The Navy Holds a Seminar on the 8th Anniversary of the Gulf of Aden Escorts"], 人民海军 [*People's Navy*], December 30, 2016, p. 1.

¹⁸² "PLA's first overseas base in Djibouti," *China Military Online*, April 12, 2016, http://english.chinamil.com.cn/news-channels/pla-daily-commentary/2016-04/12/content_7002833.htm.

¹⁸³ "Djiboutian President meets with PLA chief of general staff," *China Military Online*, Nov. 9, 2015, http://english.chinamil.com.cn/news-channels/china-military-news/2015-11/09/content_6761210.htm.

extension. Youssouf emphasized that “the terms of the contract and agreement are very clear and they are the same for each and every country that requested military presence in Djibouti.”¹⁸⁴

There is very little Chinese or other open source reporting on the specific terms of the basing deal between China and Djibouti. A lecturer at the PLA’s Space Engineering University described the status of forces agreement as follows:

According to the “China-Djibouti Status of Forces Agreement,” the troops stationed in Djibouti enjoy a series of privileges, exemptions, and conveniences. These privileges, exemptions, and conveniences are concrete manifestations of state immunity, including: inviolability of personal safety; inviolability of the camp, facilities, equipment, and property; jurisdictional immunities; convenience in the areas of exit and entry [of the country], taxation, customs, health, and quarantine; freedom of movement, freedom of communication, and freedom of travel.¹⁸⁵

There are still too few details to accurately appraise whether the terms of the China-Djibouti deal are indeed similar to those of other countries, as Youssouf claims. At minimum, the disclosed details guarantee the basic operations of the base, including personnel movement, radio frequency usage, and the flow of supplies.

Construction began in February 2016, and by July 11, 2017 the facility was formally opened with substantial fanfare in the PRC press.¹⁸⁶ Foreign commentators have long referred to it as a “naval base”—and its inauguration was indeed led by two PLAN senior captains, base commander Liang Yang and political commissar Li Chunpeng.¹⁸⁷ The first PLAN vessels to visit the base in Djibouti were the Type-071 amphibious transport dock *Jinggangshan* and the mobile landing platform *Donghaidao*, which delivered the first troops and personnel to be stationed there.¹⁸⁸

Capabilities

From the first delivery of troops, China has augmented its security presence very gradually, thereby muting potential alarm concerning its change in posture. Now that the base is operating, some limited assessments of its capabilities and purposes are possible. First, its position southwest and adjacent to the Doraleh Multipurpose Port (see Image 5 below) gives the base a potentially larger capacity, as commercial berths could be made available for all but the largest PLAN vessels. Even excluding

¹⁸⁴ 俄媒看中国在吉布提首建海外基地: 正成全球海洋大国 [“Russian Media Analyzes China’s First Overseas Military Base in Djibouti: Officially Becomes a World Maritime Great Power”], 参考消息 [Reference News], August 25, 2016, https://military.china.com/important/11132797/20160825/23376183_all.html; Katrina Manson, “China Military To Set Up First Overseas Base in Horn of Africa,” *Financial Times*, March 31, 2016, <https://www.ft.com/content/59ad20d6-f74b-11e5-803c-d27c7117d132>.

¹⁸⁵ 丰松江 [Feng Songjiang], 现代海外军事基地发展呈现新特点 [“New Features in the Development of Modern Overseas Military Bases”], 世界知识 [World Affairs], no. 11 (2018), p. 61.

¹⁸⁶ 我驻吉布提保障基地部队进驻营区仪式举行 [“Opening Ceremonies Begin for Troops Stationed at China’s Military Support Base in Djibouti”], 中国军网 [China Military Online], August 1, 2017, http://www.81.cn/hj/2017-08/01/content_7699505.htm.

¹⁸⁷ 韩国贤, 汪娜 [Han Guoxian, Wang Na], 立起练兵备战的鲜明导向 – 军队代表委员热议新时代我军练兵备战新气象新风貌新作为 [“Set Up a Clear Guide for Troop Training and Combat Readiness—Military Representatives Discuss New Style and Conduct of PLA Training and Combat Readiness in the New Era”], 中国军网 [China Military Online], March 6, 2018, http://www.81.cn/gfbmap/content/2018-03/06/content_200971.htm.

¹⁸⁸ 中国人民解放军驻吉布提保障基地成立暨部队出征仪式在湛江举行 [“Chinese People’s Liberation Army Support Base in Djibouti Established, Departure Ceremony for the Troops Held in Zhanjiang”], 新华 [Xinhua], July 11, 2017, http://www.xinhuanet.com/world/2017-07/11/c_1121302146.htm.

these potential dual-use facilities, the military base alone is capable of supporting a wide range of PLA operations well beyond logistical support.



Image 5. Doraleh Multipurpose Port and PLA Support Base (December 10, 2018)

Open-source satellite imagery shows facilities for fuel, weapons, and equipment storage and various maintenance facilities for ships and aircraft.¹⁸⁹ There is no dry dock, floating or fixed, visible at the facility, but there are locations to the south of the main pier available for such a facility. As noted above, its proximity to the expansive yards at the Doraleh Multipurpose Port provides for significant augmentation of base operations. Some estimates suggest as many as 10,000 personnel could be stationed on the base.¹⁹⁰ At 4,000 personnel, the U.S. military presence is currently the largest of the seven nations with military facilities hosted by Djibouti.¹⁹¹

Open-source descriptions of the base's facilities are trickling in over time. The October 2017 issue of *Naval & Merchant Ships*, a Chinese publication, included a graphic of the base that marked, among other structures, an armory, equipment support area, subterranean entrance, barracks, heliport, oil depot, reinforced bunker, and pier (see Image 6 below).¹⁹² Official sources confirm an organic PLAN

¹⁸⁹ Lin, Jeffrey and Singer, P.W., "China just deployed to its first overseas base," *Popular Science*, July 13, 2017, <http://www.popsci.com/china-deploys-first-overseas-base-djibouti#page-2>; Shaul Shay, "China Opens First Overseas base in Djibouti," *Israel Defense*, August 2, 2017, <http://www.israeldefense.co.il/en/node/30570>.

¹⁹⁰ Laura Zhou, "China Sends Troops to Military Base in Djibouti, Widening Reach Across Indian Ocean," *South China Morning Post*, July 13, 2017, <https://www.scmp.com/news/china/diplomacy-defence/article/2102422/china-sends-troops-military-base-djibouti-widening>.

¹⁹¹ Commander, Navy Region Europe, Africa, Central -Camp Lemonnier, Djibouti, https://cnic.navy.mil/regions/cnreufswa/installations/camp_lemonnier_djibouti.html, (accessed March 27, 2020). The other nations with military facilities or bases in Djibouti are France, Germany, Italy, Japan, and Spain.

¹⁹² 中国人民解放军驻吉布提保障基地功能与作用浅析想象图 ["Concept Graphic of Analysis of the Functions and Roles of the Chinese PLA Support Base in Djibouti"], 舰船知识 [*Naval & Merchant Ships*], October 2017.

petroleum, oil, and lubricant (POL) transport detachment is deployed on base, likely to carry out future refueling operations.¹⁹³ Analysis of satellite imagery found “at least 10 storage barracks, [an] ammunition point, [an] office complex and a heliport.” The report also noted two entrances to the base (one connecting to the main road and another connecting to the container terminal) and four layers of defensive works.¹⁹⁴ The heliport includes several hangars and a 400-meter (approx. 1,312 foot) runway with air traffic control.¹⁹⁵ Thus far, no aircraft have been reported deployed to the installation, nor could combat or transport aircraft use this short runway.



Image 6. Naval & Merchant Ships depiction of activities at Djibouti Support Base

Construction of a dedicated naval pier is a key development in the base’s ability to support PLAN operations. In May 2018, China began rapid construction of a 330-meter long (nearly 1,100 foot) pier, which is now largely complete.¹⁹⁶ When asked whether the pier could accommodate a Chinese aircraft carrier, China’s Defense Ministry spokesperson Wu Qian did not deny the possibility, stating, “the relevant facilities are progressing as planned. The construction of this facility is for China to

¹⁹³ 刘文平, 王铁刚 [Liu Wenping, Wang Tiegang], 后勤保障: 伴随战舰挺进深蓝 [“Logistics Support: Going to the Deep Blue Alongside Warships”], 人民海军 [People’s Navy], April 15, 2019, p. 4.

¹⁹⁴ Col. Vinayak Bhat (Ret.), “China’s mega fortress in Djibouti could be model for its bases in Pakistan,” *The Print*, September 27, 2017, <https://theprint.in/security/china-mega-fortress-djibouti-pakistan/11031/>.

¹⁹⁵ Open source satellite imagery from Google Earth and EV Digital Globe.

¹⁹⁶ Jeremy Binnie, “China building pier at Djibouti base,” *Jane’s 360*, May 23, 2018, https://www.janes.com/article/80271/china-building-pier-at-djibouti-base?from_rss=1.

better carry out escorts in Somali waters in the Gulf of Aden and humanitarian rescue missions.”¹⁹⁷ Draught considerations are likely the biggest constraint on the types of ships that could berth at the Chinese base. Nonetheless, with a total of 660-meters (2,165 feet) of berthing, the pier has significant space for the PLAN’s surface combatants, especially if similar types nest alongside each other. Water depth is not an issue at the nearby Doraleh Multipurpose Port, at least. Its 50-foot depth was sufficient to moor a Type-071 LPD there in July 2018.¹⁹⁸

Station security is provided by a battalion-grade PLAN Marine Corps (PLANMC) unit that first deployed from Zhanjiang on July 11, 2017.¹⁹⁹ Initially led by Major Jiang Zhichao, the battalion comprises three mechanized infantry companies, based on a battalion-wide field march exercise in January 2018. During the exercise, one third of the battalion sortied each day, rather than en masse. Video footage of the exercise shows company-sized infantry units marching in the field.²⁰⁰ These infantry companies are reinforced by an unknown number of wheeled combat vehicles, including at least eight ZBL-08 infantry fighting vehicles and two ZTL-11 assault vehicles.²⁰¹

Such displays offer some idea of the combat strength present at the Djibouti Support Base. Chinese media coverage of the 2019 Lunar New Year greeting showed approximately 180 standing personnel, two ZTL-11 assault vehicles, four ZBL-08 infantry fighting vehicles, and two Mengshi light vehicles.²⁰² This likely reflects the battalion command staff and one mechanized infantry company, although it is unclear whether each company is supported by the same number of combat vehicles. Other support elements, such as artillery batteries or aviation units, have not been observed at the Djibouti installation. The addition of PLAN or PLANMC rotary wing aircraft would greatly enhance the battalion’s mobility and range.

Recent reports also indicate the presence of a PLANMC special forces detachment on base. Base commander Senior Captain Liang Yang oversaw related counterterrorism and law enforcement

¹⁹⁷ 2019 年 12 月国防部例行记者会文字实录 [“Transcript of the Regular Ministry of Defense Press Conference in December 2019”], 国防部 [Ministry of Defense], December 26, 2019, http://www.mod.gov.cn/info/2019-12/26/content_4857590_2.htm.

¹⁹⁸ “China Djibouti Base: Type 71 LPD Docked,” Twitter Account of @rajfortyseven, posted on September 4, 2018, <https://twitter.com/rajfortyseven/status/1036827304033284096>.

¹⁹⁹ 我军驻吉布提保障基地成立 暨部队出征仪式在湛江举行 [“The PLA Support Base in Djibouti is Established with a Unit Deployment Ceremony Held in Zhanjiang”], 新华社 [Xinhua], July 12, 2017, http://www.cnr.cn/gd/gdtt/20170712/t20170712_523846250.shtml.

²⁰⁰ For video coverage of the training exercise, see: 张庆宝 [Zhang Qingbao], 中国驻吉布提保障基地全员全装野外徒步行军 [“Chinese Support Base in Djibouti in All-Personnel, Full-Gear Field March”], 央视军事农业高清 [CCTV Military/Agriculture High-Definition], January 11, 2018, <http://www.chinanews.com/m/shipin/2018/01-11/news750999.shtml>; Also see 张庆宝, 檀龙龙 [Zhang Qingbao, Tan Longlong], 我驻吉布提保障基地开展全员全装野外训练 [“China’s Support Base in Djibouti Conducts Field Training of All Personnel in Full-Gear”], 人民海军 [People’s Navy], January 15, 2018, p. 1.

²⁰¹ This assessment is based on Lunar New Year greetings recorded by base personnel in 2018 and 2019. See: 过年啦 官兵送祝福啦 驻吉布提保障基地官兵给祖国人民拜年啦 [“It’s the New Year and the Troops Send Blessings, The Troops Stationed at the Support Base in Djibouti Wish the Homeland a Happy New Year”], 解放军新闻传播中心融媒体 [PLA News Broadcast Center Integrated Media], February 15, 2018, <https://v.qq.com/x/page/s0553v19jd2.html>; 驻吉布提保障基地向祖国亲人拜年! 祝祖国繁荣昌盛, 人民幸福安康 [“The Support Base in Djibouti Wishes Loved Ones in the Homeland a Happy New Year! Wish for a Prosperous Motherland and a Prosperous People”], 好看视频 [Haokan Video], February 5, 2019, <https://haokan.baidu.com/v?vid=9028898073727101039&pd=bjh&fr=bjhaauthor&type=video>.

²⁰² Ibid.; Dongfeng CSK-131 light protected infantry vehicles have been seen at the Djibouti Support Base. 我驻吉布提保障基地开展战备拉动演练 [“Our Support Base in Djibouti Conducts Combat Readiness Mobilization Exercises”], 当代海军杂志社 [Navy Today Magazine], July 10, 2018, <http://www.yidianzixun.com/article/OJVNZoQh>.

training for Djiboutian Coast Guard personnel in early February 2020. Members of the PLANMC special forces detachment conducted training exercises such as boarding, anti-piracy, and hostage rescue using rigid-hull inflatable craft equipped with 12.7mm Type-89 heavy machine guns.²⁰³



Image 7. Djibouti base opening ceremony²⁰⁴

Combat training involving the PLANMC began less than two months after the base's opening. This training appears geared toward conditioning the troops for operations in Djibouti's harsh desert conditions. Appendix A details all reported combat training events. These exercises provide some insight into the combat capabilities and levels of readiness of the PLANMC troops defending the base. In large part, tactical weapons training is focused on small unit rapid response against threats to PRC personnel in Djibouti and the base itself. Satellite imagery suggests there is an urban-warfare training facility in the southeastern corner of the base, perhaps for this purpose. However, there has been no specific mention in open source Chinese-language materials of any role for this unit to conduct such missions within the region.

²⁰³ 吉布提当地电视台报道的我海军驻吉布提保障基地特战分队与吉布提海警 [“Local Djibouti Television Station Reports on Our Special Operations Detachment from the Naval Support Base in Djibouti and the Djiboutian Coast Guard”], 新浪网 [Sina Weibo], February 13, 2020, http://k.sina.com.cn/article_1896058141_m71038d1d03300kzm5.html?from=mil; 我军驻吉布提部队为吉方培训海警颁发中文证书 [“PLA Unit Stationed in Djibouti Trains Djiboutian Coast Guard and Issue Chinese Certificate”], 新浪军事 [Sina Military], February 6, 2020, <https://mil.sina.cn/sd/2020-02-06/detail-iimxyqvz0671802.d.html?from=wap>.

²⁰⁴ 孟凡礼, 张建华, 梁蓬飞, 张能华 [Meng Fanli, Zhang Jianhua, Liang Pengfei, Zhang Nenghua], 吉布提: 见证中国红、和平蓝 [“Djibouti: Meet a Red China and a Blue Peace”], 解放军画报 [PLA Pictorial], no. 9A, 2017, p. 58.

Functions and Missions

Since 2015, the PLAN has been tasked not only with “near seas defense,” its limited historical role, but also the more expansive mission of “far seas protection.”²⁰⁵ This entails securing strategic SLOCs, protecting citizens and investments overseas, and conducting military diplomacy.²⁰⁶ The anti-piracy mission preceded this doctrinal shift and has now given way to a range of actual and potential roles for the PLAN units operating outside of China’s immediate backyard. Non-combatant evacuation operations are plainly a priority, after the hard lessons of evacuating 35,000 Chinese nationals from war-torn Libya in 2011.²⁰⁷ Another smaller-scale operation involving three PLAN ships evacuated PRC (and other) citizens from Yemen to Djibouti in 2015.²⁰⁸ Djibouti is ideally positioned to support PLAN operations in those hot spots.

Logistics Support for the PLAN

Supporting anti-piracy escort task forces was a major justification to construct the Djibouti Support Base. The PLAN has relied heavily on the port of Djibouti for quite some time. Beginning with the 4th Escort Task Force’s port-call in January 2010, every escort task force to date has stopped in Djibouti for replenishment (补给), rest, rehabilitation and training (休整), inspection and maintenance (检修), and other diplomatic, goodwill, and cultural activities (see Appendix B).²⁰⁹ PLAN ships almost always moor in Djibouti’s old port area where they are greeted by PRC embassy staff and nationals brought to welcome each ship. Since construction of the base, senior officers and personnel from the installation have also been on hand to greet each ship entering the port.

The PLAN spends a significant amount of time in Djibouti. Escort task forces, comprised of two surface combatants and a replenishment ship, conduct their in-port rest and replenishment in rounds. The vessels in each three-ship task force typically take turns entering port, while the remaining two continue performing escort missions. Since ships most often remain pier-side for five days, this means a PLAN ship will be in Djibouti for much of the month when each task force visits.²¹⁰ Some task forces visit twice during their deployments.²¹¹ This time adds up. According to senior leaders in the PLAN Logistics Department, the cycle time for rest and replenishment of escort task forces in Djibouti will be greatly shortened as conditions mature, particularly conditions at the support base. Improvements in berthing, material supply, medical support, and repairs will also reduce reliance on in-theater replenishment ships.²¹²

²⁰⁵ PRC, State Council Information Office, *China’s Military Strategy* (Beijing: Foreign Languages Press, May 2015), p. 13.

²⁰⁶ Office of Naval Intelligence, *The PLA Navy: New Capabilities and Missions for the 21st Century* (Suitland, MD: Office of Naval Intelligence, 2015), pp. 7-11.

²⁰⁷ “35,860 Chinese nationals in Libya evacuated: FM,” *China Daily*, March 3, 2011, http://www.chinadaily.com.cn/china/2011-03/03/content_12105999.htm.

²⁰⁸ “Spotlight: China completes evacuation from Yemen, assisting 629 nationals, 279 foreigners,” *Xinhua*, April 7, 2015, http://www.xinhuanet.com/english/2015-04/07/c_134130679.htm.

²⁰⁹ 中国海军护航编队‘马鞍山’号抵达吉布提港进行补给休整 [“Ma’Anshan’ of the Chinese Navy Escort Task Force Arrives in Djibouti Port for Replenishment and Rest”], 驻吉布提使馆 [PRC Embassy in Djibouti], January 25, 2010, <http://dj.china-embassy.org/chn/xwdt/t653660.htm>.

²¹⁰ Escort task forces usually include destroyers, frigates, and Type-903 or Type-901 replenishment ships, although Type-071 landing platforms docks have also taken part in a few anti-piracy deployments. See Appendix A.

²¹¹ Some escort task forces make multiple stops in Djibouti during their deployment. For example, ships of the 13th, 19th, 22nd, 23rd, and 30th escort task forces called on Djibouti twice. See Appendix B.

²¹² 刘文平, 王铁刚 [Liu Wenping, Wang Tiegang], 后勤保障: 伴随战舰挺进深蓝 [“Logistics Support: Going to the Deep Blue Alongside Warships”], 人民海军 [People’s Navy], April 15, 2019, p. 4.

The Djibouti base can also facilitate longer duration deployments of PLAN escort task forces in theater. PLAN escort forces spend up to 40 percent of their three-month deployment cycles underway across 6,000-7,000 nautical miles to reach the Gulf of Aden, requiring their destroyers and frigates to replenish twice on route.²¹³ Although experience and training in underway replenishment was sorely needed when escort operations began in 2008, after more than ten years the PLAN has matured enough that it now seeks to optimize its far-seas escort operations. At least one Chinese analyst believes Djibouti could serve as a shore leave location, allowing deployment times to the Gulf of Aden to be extended by about 20 percent.²¹⁴ The base has medical facilities, dormitories and athletic facilities that could provide improved rest and relief for naval personnel.²¹⁵ While Djibouti's inhospitable climate is not an ideal place for shore leave, base facilities may compare favorably to life aboard smaller surface combatants. A PLAN medical survey conducted on the 4th Escort Task Force reported high numbers of sailors suffering from mild to moderate depression despite measures taken to alleviate such effects, such as short-term shore leave.²¹⁶ The need to sustain morale could explain the relatively frequent stops in Djibouti by PLAN frigates, since task forces include replenishment ships that should satisfy replenishment requirements and keep combat ships on station.

Security is a big concern for PLAN forces when in port. Personnel on shore leave must undergo security and diplomatic briefings, and staff must carefully plan leave events ahead of time.²¹⁷ Chinese reports also indicate concern over ship security when in close proximity to other international navies at the Djibouti old port. In December 2016, the 25th Escort Task Force reported sighting divers approaching a PLAN ship in port, accusing a Japanese naval ship moored nearby.²¹⁸ The Djibouti Support Base provides a far more secure environment for PLAN forces operating in theater. A long-term lease on the facility permits construction of underground or otherwise hardened facilities that better protect military personnel and assets. Once the naval pier becomes operational, fueling, replenishment, and shore leave will become even more secure.

PLAN medical, logistics, and equipment support staff stationed on base began providing support to task forces immediately after opening in August 2017, starting with the 27th anti-piracy Escort Task Force's stopover in Djibouti. Over the next year, it provided support and repair services involving nearly 1,000 parts to four escort task forces.²¹⁹ This underscores the ability of the base facilities to

²¹³ 博文 [Bo Wen], 海外基地支持中国海军远洋护航升级 ["Overseas Bases Support Upgrade of Chinese Navy's Ocean Escort"], 现代舰船 [Modern Ships], no. 4 (January 15, 2019), p. 51.

²¹⁴ Ibid.

²¹⁵ One chief petty officer 4th class that accumulated 827 days at sea over four anti-piracy escort task forces emphasized to reporters the importance of having the base for shore relief of escort personnel. See 吉布提基地政委: 我海军护航编队将转为以海外基地保障为主 ["Djibouti Base Political Commissar: Chinese Naval Escort Task Forces will Shift Over to Support Primarily from Overseas Bases"], 央视 [CCTV], December 27, 2018, https://www.guancha.cn/military-affairs/2018_12_27_484806.shtml.

²¹⁶ The 4th Escort Task Force included two Type-054 frigates. 金昊 [Jin Hao], 吉布提: 人民解放军首个海外基地 ["Djibouti: The PLA's First Overseas Base"], 凤凰军事 [Phoenix News – Military], April 11, 2016, http://news.ifeng.com/a/20160411/48414276_0.shtml

²¹⁷ 中国海军第九批护航编队 停靠吉布提补给休整 ["The Ninth Chinese Escort Task Force Stops at Djibouti for Rest and Replenishment"], 中新社-海南频道 [China News—Hainan], October 6, 2011, <http://www.hi.chinanews.com/hnnew/2011-10-06/178791.html>.

²¹⁸ 日本蛙人侦察吉布提港中国军舰? 国防部: 我海军进行有效处置 ["Japanese Frogman Scouts Chinese Warship in Djibouti Port? Ministry of Defense: Our Navy Handled It Effectively"], 环球网 [Global Times], August 4, 2017, https://www.thepaper.cn/newsDetail_forward_1752605.

²¹⁹ "Djibouti Base Political Commissar: Chinese Naval Escort Task Forces will Shift Over to Support Primarily from Overseas Bases."

store prepositioned key materials to supply PLAN forces operating in the region, such as armaments, equipment, and logistics materials needed for timely support for far-seas operations.²²⁰ In addition to naval forces, the base is well-positioned to support China's large peacekeeping forces on the African continent (some 2,021, with 1,390 in east Africa), though no such support has been reported in open sources.²²¹

Intelligence Collection

Protecting China's overseas interests will require the PLA to anticipate and rapidly respond to emerging crises. There is little open discussion on this subject due to the sensitivity of intelligence matters, but the base will naturally facilitate early warning and intelligence gathering activities. PLA analysts note that intelligence collection is an important role for strategic strongpoints,²²² and others cite the U.S. military's facility at Diego Garcia as a useful model.²²³ The base's location in Djibouti is conducive to collect intelligence on other international military activities in Djibouti—most significantly, U.S. AFRICOM's Camp Lemonnier, the main hub for U.S. military operations in Africa. But the base's position on the Bab-el-Mandeb Strait provides perhaps its most important intelligence function—a favorable vantage to observe military and commercial traffic through this important global chokepoint.

HA/DR and Military Diplomacy

The PLA has also highlighted the base's ability to support regional humanitarian assistance and disaster response operations. Similarly, military diplomacy is quite visible in Djibouti. Prior to the construction of the base, PLAN escort task forces made a number of goodwill visits to local Djiboutian communities.²²⁴ The PLAN hospital ship *Peace Ark* visited Djibouti in 2010 and 2017, offering free medical care to local residents in order to foster political goodwill with Djibouti's leadership and socialize the PLA's in-country presence.²²⁵ Shortly after its opening, the base

²²⁰ 李守耕, 陈铁祺, 王丰 [Li Shougeng, Chen Tieqi, Wang Feng], 战备物资预置储备模式研究 [“On Preset Reserve Mode for Combat Readiness Material”], 军事交通学院学报 [Journal of Military Transportation University], no. 7 (July 2019), p. 59.

²²¹ United Nations, “United Nations Peacekeeping,” Data, <https://peacekeeping.un.org/en/troop-and-police-contributors>.

²²² 郑崇伟, 高占胜, 高成志 [Zheng Chongwei, Gao Zhansheng, Gao Chengzhi], 经略“21 世纪海上丝路”: 战略支撑点的构建 [“The Strategy of Maritime Silk Road in the 21st Century: Construction of Strategic Strong Points”], 第八届海洋强国战略论坛文集 [Proceedings from the 8th Maritime Power Strategy Forum], October 21, 2016, <http://kns55.cn.eastview.com/kcms/detail/detail.aspx?recid=&FileName=EGVE201610001003&DbName=CPFD2017&DbCode=CPFD>.

²²³ 董珊珊 [Dong Shanshan], 中国在印度洋的海上通道安全和战略支撑点的建立 [“China's Maritime Passage Security in the Indian Ocean and the Construction of Strategic Strong Points”], 中国水运 [China Water Transport], no. 12 (December 2015), pp. 51-52; 许可 [Xu Ke], 构建“海上丝路”上的战略支点 [“On the Establishment of Strategic Fulcrums for the ‘21st Century Maritime Silk Road’: A Reference of Diego Garcia Base for China”], 亚太安全与海洋研究 [Asia-Pacific Security and Maritime Affairs], no. 5 (2016), p. 12.

²²⁴ These included a number of visits to local elementary schools. For a few examples, see: 海军第八批护航编队慰问吉布提小学 [“Eighth Naval Escort Task Force Greets Djibouti Elementary School”], 驻吉布提使馆 [PRC Embassy in Djibouti], May 13, 2011, https://www.fmprc.gov.cn/web/gjhdq_676201/gj_676203/fz_677316/1206_677704/1206x2_677724/t822350.shtml; 第九批护航编队给小学赠送慰问品 [“Ninth Escort Task Force Donates Gifts to Elementary School”], 驻吉布提使馆 [PRC Embassy in Djibouti], October 8, 2011, <http://dj.china-embassy.org/chn/xwdt/t865663.htm>; 海军第十一批护航编队给吉布提小学赠送慰问品 [“Eleventh Naval Escort Task Force Donates Gifts to Djibouti Elementary School”], 驻吉布提使馆 [PRC Embassy in Djibouti], June 9, 2012, <http://dj.china-embassy.org/chn/xwdt/t939834.htm>.

²²⁵ 跨越大洋的友谊 ‘和平方舟’ 号执行医疗服务记事 [“Friendship Across the Oceans, A Record of the ‘Peace Ark’s’ Medical Services”], 新华社 [Xinhua], November 26, 2010, http://www.gov.cn/jrzq/2010-11/26/content_1754569.htm; 中

provided medical materials to the Djiboutian Military Police. PLA sources have indicated that the base hospital will also provide medical services to the local Djiboutian people.²²⁶ In this capacity, the base launched “Bright Mission” in cooperation with Djiboutian health authorities in December 2019 to provide cataract surgery to local citizens. The PLAN Second Military Medical University in Shanghai dispatched ten personnel to support this effort.²²⁷ The Chinese base also responded to a Djiboutian request to assist in a multinational effort to extinguish fires that broke out in Djibouti City’s landfill.²²⁸

The base hospital provides opportunities for international military engagement. PLAN forces in Djibouti conducted their first joint exercise with a foreign military on April 25, 2018, when base personnel teamed up with Italian forces to conduct medical rescue exercises.²²⁹ They performed two more medical evacuation training exercises with the European Naval Forces in the Gulf of Aden in 2018. The first involved responding to a merchant ship distress call and dispatching a team aboard an Italian frigate in Task Force 465. After rendering assistance, the exercise team returned to base on the frigate’s SH-90 helicopter with a patient in severe condition.²³⁰ In a second joint exercise, a Spanish amphibious ship focused on disaster relief, again dispatching medical personnel and coordinating foreign helicopter transport to the base’s medical facilities.²³¹

These “soft” functions continue the gradual socialization of China’s military presence in Djibouti, paving the way for incremental expansion over the coming years. Senior Chinese diplomats have already suggested, for instance, that Chinese troops could mediate border conflicts in the region.²³² While visiting Ethiopia in 2016, a high-level PLA delegation hinted at the military’s potential use of the vast PRC-built civilian infrastructure networks connecting the two African nations.²³³

国海军“和平方舟”医院船访问吉布提 [“Chinese Naval Hospital Ship ‘Peace Ark’ Visits Djibouti”], 驻吉布提使馆经商处 [Economic and Commercial Office of the PRC Embassy in Djibouti], August 27, 2017, <http://www.mofcom.gov.cn/article/i/jyjl/k/201708/20170802633862.shtml>.

²²⁶ “PLA’s Logistics Base in Djibouti Donates Medical Materials to Djibouti Military Police,” *China Military Online*, September 12, 2017, http://english.chinamil.com.cn/view/2017-09/12/content_7752981.htm.

²²⁷ 我驻吉布提保障基地启动‘光明行动’专项医疗服务 [“Chinese Support Base in Djibouti Launched Special Medical Service ‘Bright Mission’”], 新华网 [Xinhua], December 6, 2019, http://www.xinhuanet.com/mil/2019-12/06/c_1125316327.htm.

²²⁸ 苏治宏, 邱浩翰 [Su Zhihong, Qiu Haohan], 我驻吉布提保障基地参与当地灭火救援 [“Our Support Base in Djibouti Participates in Local Firefighting and Rescue”], 解放军报 [PLA Daily], August 16, 2019, http://www.mod.gov.cn/diplomacy/2019-08/16/content_4848295.htm.

²²⁹ 张庆宝, 檀龙龙 [Zhang Qingbao, Tan Longlong], 解放军吉布提保障基地首次与驻吉外军开展联合训练 [“The First Time the PLA Djibouti Support Base Conducts Joint Training with a Foreign Military”], 中非合作论坛 [China-Africa Forum], April 28, 2018, <https://www.fmprc.gov.cn/zflt/chn/zfgx/zfgxrwjl/t1555449.htm>.

²³⁰ 我驻吉布提保障基地与欧盟 465 编队开展联合救援演练 [“China’s Support Base in Djibouti Conducts Joint Rescue Drills with EU Task Force 465”], 中国军网 [China Military Online], October 15, 2018, http://www.81.cn/jfjbmap/content/2018-10/15/content_217800.htm.

²³¹ 张庆宝, 檀龙龙, 吴忠洪 [Zhang Qingbao, Tan Longlong, Wu Zhonghong], 我驻吉布提基地: 与欧盟 465 编队开展联合演练 [“China’s Base in Djibouti: Conducts Joint Exercise with EU Task Force 465”], 中国军视网 [China Military TV], October 13, 2018, http://www.js7tv.cn/video/201810_161126.html.

²³² “China offers to mediate Djibouti-Eritrea border row as it expands military presence in Africa,” *South China Morning Post*, July 25, 2017, <http://www.scmp.com/news/china/diplomacy-defence/article/2103947/china-offers-mediate-djibouti-eritrea-border-row-it>.

²³³ Fan Changlong’s delegation in November 2016 included Central Military Commission Chief of Staff Sun Jianguo, PLA Army Deputy Commander Long Haitao, PLAN Deputy Commander Ding Yi, and PLA Air Force Deputy Commander

In sum, the PRC's base in Djibouti and growing military engagement in the wider region represent an important change in the PLA's overseas posture. Given China's economic commitment to the Horn of Africa, its growing political and military connections to Djibouti and Ethiopia, and the demonstrated capacity to quickly scale up port facilities, PLA exercises, trainings, and deployments in the region will likely increase significantly over time.

Conclusion

China's growing engagement in Djibouti is a combined commercial and military undertaking to establish a strategic position for China in the western Indian Ocean and the Horn of Africa. China's comprehensive approach to first developing a commercial transport and logistics hub is characteristic of the strategic strongpoint model. Party-state priorities to access emerging markets and protect vital state and civilian interests in the region drive this process forward.

Chinese firms have so far provided a robust platform for a wide-ranging PRC diplomatic, economic, and strategic presence in Djibouti, wrapped in the narrative promise of future local wealth through the "Shekou Model." The consolidation of China's strategic position in the western Indian Ocean and east Africa depends on complementary efforts to construct and operate road, rail, and pipeline infrastructure to connect inland markets and resources to the greater maritime economy. China appears to be counting on the success of its economic development efforts in the region to translate into a long-term military presence, with the strategic influence that comes with it. But how successful have these efforts been to date?

Commercially, despite optimistic projections, China's investments in Djibouti and Ethiopia have not lived up to the hype as yet. The changing political environment in Ethiopia, its diversification away from sole reliance on Djibouti's ports, and a weakened global economy all serve as headwinds to making Djibouti and the greater Horn of Africa a successful example of the "Shekou Model." That said, if the PRC is able to patiently play the long game, its commercial investments in this region with many promising attributes may well pay off over time. Further, China's early investments give it an advantage over latecomers who will find themselves having to adjust to Chinese standards, practices, and influence already embedded in the region.

Politically, China has developed a close relationship with the Djiboutian government, to the extent that Chinese entities are involved in government-like functions through the CMPort joint venture with the Djibouti port authority, and the treasury-like role of the Silk Road Investment Bank. This augments already-close PRC relations with the Guelleh family that sits at the top of Djibouti's political structure. Through its naval diplomacy and other public relations measures, China seeks to portray itself as a positive force for the people of Djibouti, but it has clearly aimed its most important efforts at maximizing access to existing political power.

Militarily, the completion of the strategic strongpoint with the construction of the naval base further augments Chinese power in Djibouti and in this strategically important part of the world. In China's model, the military follows its economic investment. The base is becoming a useful asset for intelligence collection, regional power projection, and to sustain the PLA's growing regional presence.²³⁴ The new base also marks a strategic shift in PLAN support methods for far-seas fleet

Chen Dong. See: 范长龙访问埃塞俄比亚 ["Fan Changlong Visits Ethiopia"], 新华社 [Xinhua], November 23, 2016, <http://cpc.people.com.cn/n1/2016/1123/c64094-28889500.html>.

²³⁴ For analysis of China's broader military presence in the region, see Joel Wuthnow, "The PLA Beyond Asia: China's Growing Military Presence in the Red Sea Region," *INSS Strategic Forum*, no. 303, Jan. 2020, <https://ndupress.ndu.edu/Portals/68/Documents/stratforum/SF-303.pdf>

operations. The Djibouti Support Base political commissar explains the shift in these terms: “support methods for China’s far-seas escorts are gradually adjusting away from a focus on accompanying replenishment ships supplemented by mooring in foreign ports, into a new model focused on overseas base support supplemented by other ports abroad and domestic support.”²³⁵ Those overseas bases and “other ports abroad” are of critical importance to analysis of China’s growing military presence abroad.

After all, this first strategic strongpoint is not designed to stand alone. By itself, the base is undefendable during conflict with another major power. From the PLA’s perspective, the lone base in Djibouti cannot be the only PLA safe harbor west of Fiery Cross Reef. More strategic strongpoints will need to be established to support China’s out of area operations. This suggests China will be looking to develop additional, mutually supporting strategic strongpoints that better connect the base in Djibouti to the bases in the Spratly Islands. Djibouti’s strategic value emerges as part of a network of strategic strongpoints spanning the Indian Ocean to support expanded Chinese trade and investment and to enable the PLA to better protect China’s growing portfolio of “overseas interests.”

Looking ahead, the formal military base at Djibouti is probably not the model for how other Chinese strategic strongpoints will develop. The unique national status of Djibouti as host of several foreign militaries (most significantly, Japan) and the site of a multinational anti-piracy effort made the opportunity to set up a military base there an unusual opportunity. The remainder of the case studies in this series will examine other ports that fit the strategic strongpoint model and may form the backbone of the PLA’s expeditionary operations in the coming decades as China seeks expanding influence across the Indian Ocean region.

²³⁵ “Djibouti Base Political Commissar: Chinese Naval Escort Task Forces Will Shift Over to Support Primarily from Overseas Bases,” December 27, 2018.

Appendix A. PLA Combat Training in Djibouti (2017-2018)

Date	Details of Combat Training
22 Sep. 2017	First reported use of Djibouti's national ranges. Dozens of troops aboard ZBL-08s traveled to the National Gendarmerie Training Range. Exercises included use of various small arms and vehicle mounted weapons.
5 Nov. 2017	Series of exercises at an unknown location to mark the 19 th National People's Congress report. Involved combat realistic hostage rescue and live-fire exercises, as well as training in combat readiness patrols in full gear and emergency mobilization.
23 Nov. 2017	Live-fire exercise with heavy weapons (two ZTL-11s and three ZBL-08s) at the Arta firing range. Combined assault maneuvers meant to test tactics and emergency response capabilities. Troops practiced with assault rifles, crew-served machine guns, sniper rifles, and vehicle-mounted weapons.
9 Jan. 2018	Base organized an "all personnel tactical field march in full gear" to train the troops in conducting missions in volcanic desert conditions. Over the course of three days, three groups of personnel marched 15 km in full gear across uninhabited areas of the desert, encountering blue force harassment and overcoming challenges in combat, countering enemy surveillance aircraft, and pursuing terrorist threats on foot.
12 May 2018	Live-fire training involving ZBL-08 and ZTL-11 vehicles at the Arta firing range, focused on rapid maneuver combat and counter-terrorism response. Assault maneuvers, multi-pronged pursuit, coordinated light and heavy fires, and precision strikes against "terrorist" targets were conducted during this exercise. This exercise was reportedly conducted during the hot season to test the high-intensity limits of operational command, coordinated communications, logistics support, and equipment support. Troops deployed from the ZBL-08s also conducted ground combat tactical maneuvers.
7 Jul. 2018	A combat readiness exercise was conducted to test the rapid response capabilities of the troops at the Djibouti Support Base. Troops were seen rapidly dismounting from their Mengshi vehicle in combat gear. <i>PRC press ceased reporting on combat exercises in July 2018, but such exercises almost certainly continue to present.</i>

Appendix A Sources: 中国驻吉布提保障基地首次组织实弹射击训练 ["Chinese Support Base in Djibouti's First Time Organizing Live-Fire Training"], 澎湃防务 [The Paper-Defense], September 23, 2017, http://m.thepaper.cn/newsDetail_forward_1803823; 张庆宝, 蔡吕良 [Zhang Qingbao, Cai Lüliang], 驻吉布提保障基地官兵 - 不负重托, 担好首任首责 ["Officers and Soldiers of the Support Base in Djibouti Bear Great Trust and Take on the First Assignment with Responsibility"], 人民海军 [People's Navy], November 6, 2017, p. 1; Zhao Lei, Zhou Jin, "Live-fire Exercises Conducted by PLA Base in Djibouti," *China Daily*, November 25, 2017, http://www.chinadaily.com.cn/china/2017-11/25/content_34966883.htm; 张庆宝, 周致远 [Zhang Qingbao, Zhou Zhiyuan], 我驻吉布提保障基地组织火炮实施射击训练 ["Chinese Support Base in Djibouti Organizes Live Cannon Fire Training"], 中国军网 [China Military Online], November 28, 2017, http://www.81.cn/jmtt/2017-11/28/content_7845356.htm; 张庆宝, 檀龙龙 [Zhang Qingbao, Tan Longlong], 我驻吉布提保障基地开展全员全装野外训练 ["Chinese Support Base in Djibouti Conducts All-Personnel Field March in Full Gear"], 人民海军 [People's Navy], January 15, 2018, p. 1; 张庆宝, 陈平, 张振凯 [Zhang Qingbao, Chen Ping, Zhang Zhenkai], 我驻吉布提保障基地开展实兵实装实弹演练 ["Chinese Support Base in Djibouti Conducts Live-fire Training Exercise with Real Troops and Equipment"], 央广网 [China National Radio], May 16, 2018, http://military.china.com.cn/2018-05/16/content_51336435_2.htm; "Our Support Base in Djibouti Conducts Combat Readiness Mobilization Exercises."

Appendix B. PLAN Port Calls to Djibouti (2010-Present)

Date	Mission	Vessel
24 January 2010	4 th Anti-piracy Escort Task Force	Type-054 frigate <i>Ma'anshan</i>
28 January 2010	4 th Anti-piracy Escort Task Force	Type-054 frigate <i>Wenzhou</i>
10 February 2010	4 th Anti-piracy Escort Task Force	Type-054A frigate <i>Chaohu</i>
3 May 2010	5 th Anti-piracy Escort Task Force	Type-052B destroyer <i>Guangzhou</i>
10 May 2010	5 th Anti-piracy Escort Task Force	Type-054A frigate <i>Chaohu</i>
23 August 2010	Friendly Visit	Type-920 hospital ship <i>Heping Fangzhou</i>
24 August 2010	6 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
13 September 2010	6 th Anti-piracy Escort Task Force	Type-071 landing platform dock <i>Kunlunshan</i>
20 September 2010	6 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Lanzhou</i>
13 December 2010	7 th Anti-piracy Escort Task Force	Type-054A frigate <i>Zhoushan</i>
20 December 2010	7 th Anti-piracy Escort Task Force	Type-054A frigate <i>Xuzhou</i>
21 February 2011	7 th Anti-piracy Escort Task Force	Type-054A frigate <i>Zhoushan</i>
29 March 2011	8 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Qiandaohu</i>
10 May 2011	8 th Anti-piracy Escort Task Force	Type-054 frigate <i>Wenzhou</i>
15 May 2011	8 th Anti-piracy Escort Task Force	Type-054 frigate <i>Ma'anshan</i>
6 October 2011	9 th Anti-piracy Escort Task Force	Type-052B destroyer <i>Wuhan</i>
12 October 2011	9 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yulin</i>
19 October 2011	9 th Anti-piracy Escort Task Force	Type-901 replenishment ship <i>Qinghaihu</i>
1 January 2012	10 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yuncheng</i>
12 January 2012	10 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Haikou</i>
7 March 2012	10 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Haikou</i>
24 March 2012	11 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
11 May 2012	11 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yantai</i>
20 May 2012	Circumnavigation—Friendly Visit	Type-679 training ship <i>Zhenghe</i>
23 May 2012	11 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
5 June 2012	11 th Anti-piracy Escort Task Force	Type-052 destroyer <i>Qingdao</i>
13 August 2012	12 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yiyang</i>
19 August 2012	12 th Anti-piracy Escort Task Force	Type-054A frigate <i>Changzhou</i>
1 December 2012	13 th Anti-piracy Escort Task Force	Type-054A frigate <i>Huangshan</i>
8 December 2012	13 th Anti-piracy Escort Task Force	Type-054A frigate <i>Hengyang</i>
14 December 2012	13 th Anti-piracy Escort Task Force	Type-901 replenishment ship <i>Qinghaihu</i>
31 January 2013	13 th Anti-piracy Escort Task Force	Type-054A frigate <i>Huangshan</i>
9 February 2013	13 th Anti-piracy Escort Task Force	Type-054A frigate <i>Hengyang</i>

6 June 2013	14 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
25 July 2013	14 th Anti-piracy Escort Task Force	Type-052 destroyer <i>Ha'erbin</i>
30 July 2013	14 th Anti-piracy Escort Task Force	Type-053H3 frigate <i>Mianyang</i>
7 October 2013	15 th Anti-piracy Escort Task Force	Type-071 landing platform dock <i>Jinggangshan</i>
14 October 2013	15 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Taihu</i>
21 October 2013	15 th Anti-piracy Escort Task Force	Type-054A frigate <i>Hengshui</i>
22 February 2014	16 th Anti-piracy Escort Task Force	Type-053H3 frigate <i>Luoyang</i>
13 March 2014	16 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Taihu</i>
1 April 2014	16 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yancheng</i>
30 June 2014	17 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Changchun</i>
5 July 2014	17 th Anti-piracy Escort Task Force	Type-054A frigate <i>Changzhou</i>
10 July 2014	17 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Chaohu</i>
30 July 2014	17 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Changchun</i>
8 September 2014	18 th Anti-piracy Escort Task Force	Type-071 landing platform dock <i>Changbaishan</i>
13 September 2014	18 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yuncheng</i>
3 November 2014	18 th Anti-piracy Escort Task Force	Type-071 landing platform dock <i>Changbaishan</i>
26 January 2015	19 th Anti-piracy Escort Task Force	Type-054A frigate <i>Linyi</i>
31 January 2015	19 th Anti-piracy Escort Task Force	Type-054A frigate <i>Weifang</i>
13 February 2015	19 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
30 March 2015	19 th Anti-piracy Escort Task Force/NEO	Type-054A frigate <i>Linyi</i>
31 March 2015	19 th Anti-piracy Escort Task Force/NEO	Type-054A frigate <i>Weifang</i>
1 June 2015	20 th Anti-piracy Escort Task Force	Type-051 destroyer <i>Jinan</i>
7 June 2015	20 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yiyang</i>
12 June 2015	20 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Qiandaohu</i>
30 June 2015	20 th Anti-piracy Escort Task Force	Type-051 destroyer <i>Jinan</i>
Mid-July 2015	20 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yiyang</i>
6 September 2015	21 st Anti-piracy Escort Task Force	Type-054A frigate <i>Liuzhou</i>
12 September 2015	21 st Anti-piracy Escort Task Force	Type-054A frigate <i>Sanya</i>
17 September 2015	21 st Anti-piracy Escort Task Force	Type-901 replenishment ship <i>Qinghaihu</i>
8 February 2016	22 nd Anti-piracy Escort Task Force	Type-052 destroyer <i>Qingdao</i>
6 April 2016	22 nd Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Taihu</i>
12 April 2016	22 nd Anti-piracy Escort Task Force	Type-054A frigate <i>Daqing</i>
29 April 2016	23 rd Anti-piracy Escort Task Force	Type-054A frigate <i>Zhoushan</i>
15 May 2016	23 rd Anti-piracy Escort Task Force	Type-054A frigate <i>Xiangtan</i>

10 July 2016	23 rd Anti-piracy Escort Task Force	Type-054A frigate <i>Zhoushan</i>
16 July 2016	23 rd Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Chaohu</i>
3 October 2016	24 th Anti-piracy Escort Task Force	Type-052 destroyer <i>Ha'erbin</i>
9 October 2016	24 th Anti-piracy Escort Task Force	Type-054A frigate <i>Handan</i>
15 October 2016	24 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Dongpinghu</i>
12 January 2017	25 th Anti-piracy Escort Task Force	Type-054A frigate <i>Hengyang</i>
Mid-March 2017	25 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Honghu</i>
22 March 2017	25 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yulin</i>
1 May 2017	26 th Anti-piracy Escort Task Force	Type-054A frigate <i>Huanggang</i>
7 May 2017	26 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yangzhou</i>
13 May 2017	26 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Gaoyouhu</i>
28 June 2017	Task Force 150–Long-distance Friendly Visit	Type-052C destroyer <i>Changchun</i> , Type-054A frigate <i>Jingzhou</i> , Type-903A replenishment ship <i>Chaohu</i>
1 August 2017	26 th Anti-piracy Escort Task Force (base opening ceremony)	Unclear - personnel from 26 th Anti-piracy Escort Task Force present during base opening ceremony
23 August 2017	Harmonious Mission-2017	Type-920 hospital ship <i>Heping Fangzhou</i>
6 September 2017	27 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Haikou</i>
Mid-September 2017	27 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yueyang</i> , Type-901 replenishment ship <i>Qinghaihu</i>
6 November 2017	27 th Anti-piracy Escort Task Force	Type-052C destroyer <i>Haikou</i>
Mid-November 2017	27 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yueyang</i> , Type-901 replenishment ship <i>Qinghaihu</i>
8 February 2018	28 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Taihu</i>
19 February 2018	28 th Anti-piracy Escort Task Force	Type-054A frigate <i>Yancheng</i>
25 February 2018	28 th Anti-piracy Escort Task Force	Type-054A frigate <i>Weifang</i>
14 May 2018	29 th Anti-piracy Escort Task Force	Type-054A frigate <i>Xuzhou</i>
20 May 2018	29 th Anti-piracy Escort Task Force	Type-054A frigate <i>Binzhou</i>
26 May 2018	29 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Qiandaohu</i>
9 September 2018	30 th Anti-piracy Escort Task Force	Type-054A frigate <i>Wuhu</i>
14 September 2018	30 th Anti-piracy Escort Task Force	Type-054A frigate <i>Handan</i>
19 September 2018	30 th Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Dongpinghu</i>
10 November 2018	30 th Anti-piracy Escort Task Force	Type-054A frigate <i>Wuhu</i>
16 November 2018	30 th Anti-piracy Escort Task Force	Type-054A frigate <i>Handan</i>
26 January 2019	31 st Anti-piracy Escort Task Force	Type-054A frigate <i>Xuchang</i>
20 February 2019	31 st Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Luomahu</i>
10 March 2019	31 st Anti-piracy Escort Task Force	Type-071 landing platform dock <i>Kunlunshan</i>

14 May 2019	32 nd Anti-piracy Escort Task Force	Type-052C destroyer <i>Xi'an</i>
22 May 2019	32 nd Anti-piracy Escort Task Force	Type-054A frigate <i>Anyang</i>
21 July 2019	32 nd Anti-piracy Escort Task Force	Type-054A frigate <i>Anyang</i>
26 July 2019	32 nd Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Gaoyouhu</i>
24 September 2019	33 rd Anti-piracy Escort Task Force	Type-052D destroyer <i>Xining</i>
30 September 2019	33 rd Anti-piracy Escort Task Force	Type-054A frigate <i>Weifang</i>
6 October 2019	33 rd Anti-piracy Escort Task Force	Type-903A replenishment ship <i>Kekexilihu</i>
20 January 2020	34 th Anti-piracy Escort Task Force	Type-903 replenishment ship <i>Weishanhu</i>
25 January 2020	34 th Anti-piracy Escort Task Force	Type-052D destroyer <i>Yinchuan</i>

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