

● THREAT LEVEL: EXTREME

RENEWED WAR IN NORTHERN ETHIOPIA

Pretoria has collapsed, alliances have reversed and the conflict is spreading beyond Tigray.

REPORTING TO

27 September 2026

COVERAGE

Tigray · Afar · Amhara · Eritrea

Illustrative image (AI-generated)

BOTTOM LINE

Ethiopia's worst security crisis since 2022 is no longer a Tigray problem

Open war between the federal army (ENDF) and TPLF-aligned forces resumed on 22–23 September 2026. Tigrayan forces have pushed into Afar and Amhara, and the TPLF now sits inside a seven-member national alliance that aims to remove Prime Minister Abiy Ahmed.

Who fired first is disputed. Addis Ababa describes an “all-out offensive”; Tigrayan authorities describe an “open invasion” by drones, airstrikes and artillery. Neither account can be independently verified. What is clear is that September was the culmination of a long deterioration, not a sudden outbreak.

95%

of Ethiopia's trade by volume moves on the Addis–Djibouti corridor through Afar

7

armed movements in the Alliance for Survival, spanning 5 major regions

4

northern airports closed or under rebel control: Mekelle, Axum, Shire, Lalibela

750_k

people already internally displaced in Tigray before this escalation

KEY JUDGEMENTS

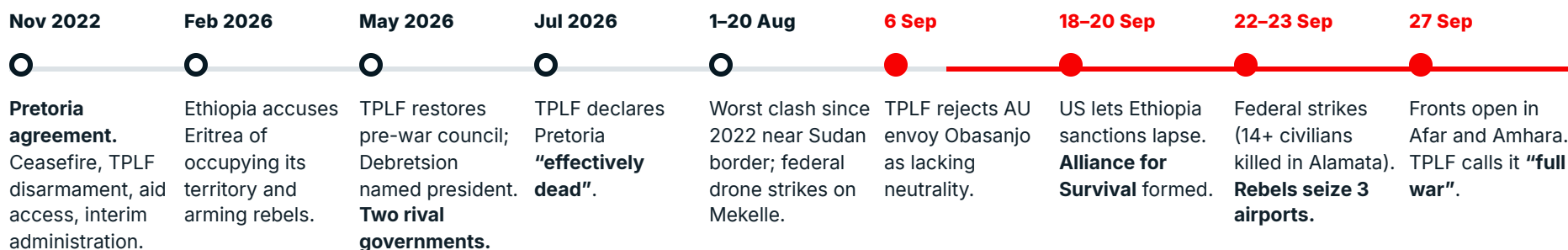
- 01 Not “Tigray War 2.0”.** Fano, a federal ally in 2020–22, now fights alongside the TPLF; Eritrea, also a federal ally then, is accused of backing the rebels.
- 02 Politically significant, militarily fragmented.** The alliance has no joint command and conflicting territorial claims, above all over Western Tigray.
- 03 Most likely: protracted attrition** along the Tigray–Afar and Tigray–Amhara boundaries over 1–3 months, with federal air power offsetting Tigrayan ground gains.
- 04 Escalation triggers:** direct Eritrean involvement, or fighting that reaches the Djibouti corridor.
- 05 Mediation prospects are weak.** The TPLF rejected AU envoy Olusegun Obasanjo on 6 September.

THREATRATE THREAT LEVEL: NORTHERN ETHIOPIA

LOW MODERATE ELEVATED HIGH **EXTREME**

HOW THE PRETORIA PEACE UNRAVELLED

Pretoria stopped the war but left every core dispute open



THE UNFINISHED DEAL

Implementation was partial. Tigrayan leaders say Addis Ababa failed to restore services, withdraw non-federal forces, return displaced people and reintegrate Tigray politically, and cite federal restrictions on fuel and cash. The federal government says the TPLF never fully disarmed and sought to restore its pre-war authority.

THE BREAKING POINT

From May 2026 Tigray effectively had two competing governments. The 1 August battle near the Sudan border lasted several hours. Human Rights Watch called a 20 August strike on a teachers' residential compound unlawfully indiscriminate.

MEDIATION FAILS IN PARALLEL

The lapse of the US national emergency on 18-19 September ended sanctions on Eritrea's ruling party and military. Two days later the Alliance for Survival turned a bilateral dispute into a potential national struggle over who governs Ethiopia.

34

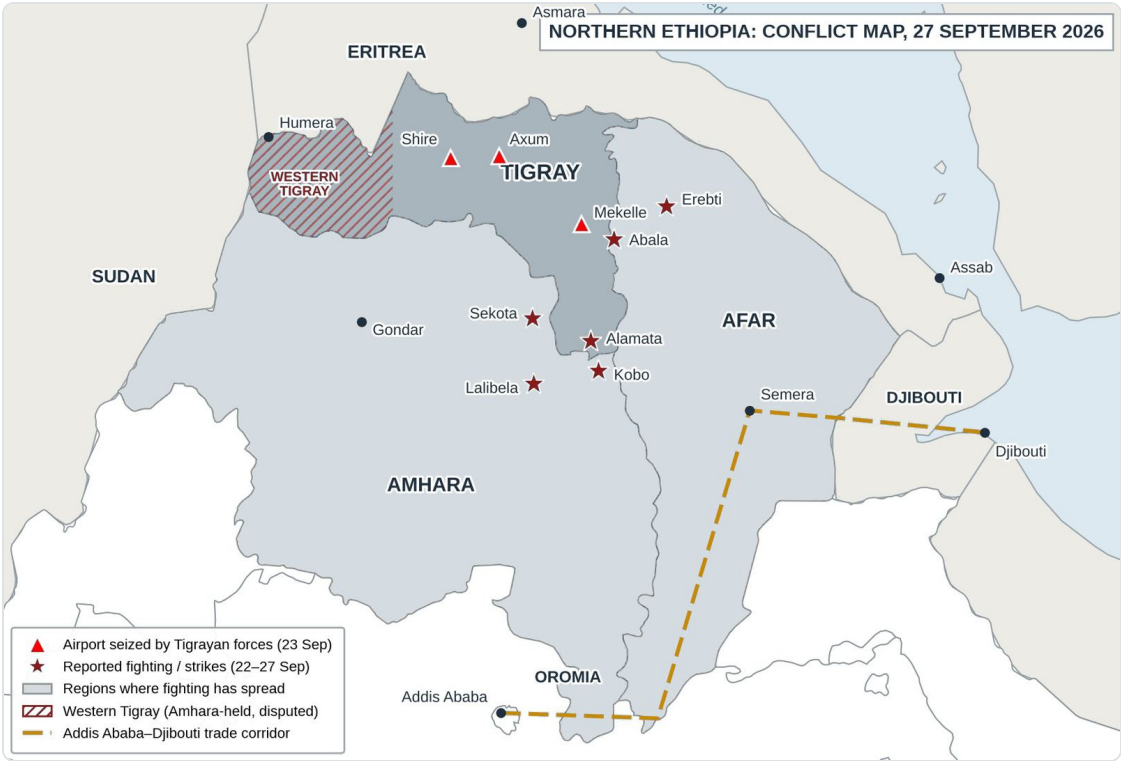
months from the Pretoria ceasefire to renewed open war

2

competing governments in Tigray since May 2026

3

days from the alliance launch (20 Sep) to the airport seizures (23 Sep)



Map: ThreatRate, based on open-source reporting to 27 September 2026

48h

from airport seizures to new fronts in Afar and Amhara

272

Tigrayan fighters killed in Amhara, per army claim (unverified)

14+

civilians reportedly killed in strikes on schools in Alamata

22 SEPTEMBER ONWARDS

From reaction to offensive posture

The turning point came on **23 September**, when Tigrayan forces seized the airports at Mekelle, Axum and Shire and detained federal personnel. It followed a wave of federal drone and airstrikes on 22 September. Ethiopian Airlines suspended flights to the three cities and the TPLF declared a “defensive war”.

FRONT	REPORTED ACTIVITY
Afar	Claimed Tigrayan advances around Abala, Erebt and the Danakil area
Amhara	Fighting around Sekota, Kobo and Lalibela, where Fano is active. Fano claims two army colonels captured in North Wollo
Air & comms	Lalibela airport closed; phone and internet cut across Tigray and much of the north

On 27 September army chief Field Marshal Berhanu Jula pledged “wisdom and restraint”, while the TPLF described the situation as “full war”.

WHO IS FIGHTING WHOM

A complete reversal of alliances

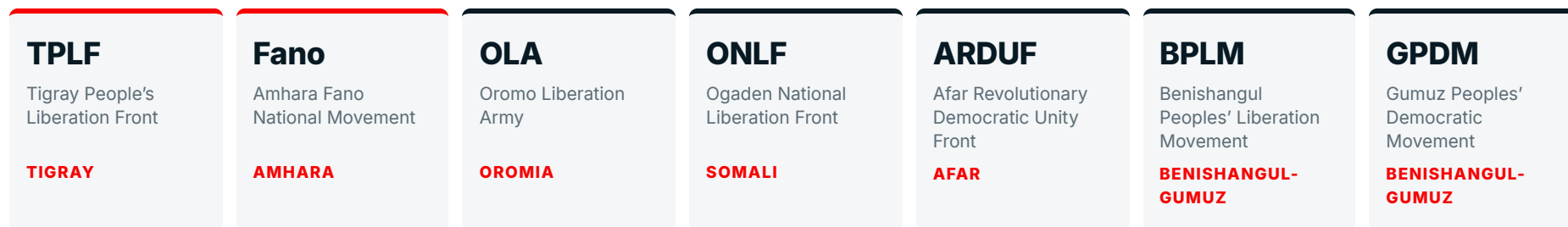


The TPLF dominated Ethiopian politics for nearly three decades until Abiy Ahmed took office in 2018. The 2020-2022 war that followed is estimated to have killed

~600,000

people through violence, famine and the collapse of health services. The TPLF lost most of its heavy weapons in 2022.

THE ALLIANCE FOR SURVIVAL · ANNOUNCED 20 SEPTEMBER · CHAIRED BY FANO COMMANDER ZEMENE KASSIE



Politically significant. For the first time, armed opposition across five major regions shares one declared goal: remove Abiy and install a transitional administration.

Militarily weak. No joint commander, geographically separated members, several past enemies, and the OLA already demanding Fano disown certain factions. A coordination platform, not an army.

WHY THEY ARE FIGHTING

Two fault lines under the frontline

1 • WESTERN TIGRAY

The most dangerous unresolved territorial question. Amhara forces seized it in the last war and still control it; hundreds of thousands of Tigrayans were displaced. Tigray demands its return; most Amhara actors, including many in Fano, regard it as Amhara land. The TPLF–Fano partnership **suspends this dispute; it does not resolve it**, and it is the fault line most likely to break the alliance.

2 • FEDERALISM VS CENTRALISATION

Movements in Tigray, Amhara, Oromia and elsewhere accuse Abiy's government of concentrating power and interfering in regional affairs. Addis Ababa argues stronger central control is needed to hold the state together. The alliance turns separate regional grievances into a single national challenge.

THEN VS NOW

ACTOR	2020–2022	2026
Eritrea	Federal ally, troops in Tigray	Accused rebel backer
Fano	Fought the TPLF	Chairs the rebel alliance

THE CRITICAL EXTERNAL VARIABLE

Eritrea: from ally to suspected adversary

In February 2026 Ethiopia accused Eritrea of occupying Ethiopian territory and supporting armed groups; Asmara called this “false and fabricated”. Abiy's repeated calls for Red Sea access are read in Asmara as a threat to the port of Assab. The lapse of US sanctions improves Asmara's diplomatic position just as Addis accuses it of backing the rebels.

STAYS OUT

Remains primarily an internal Ethiopian war.

INDIRECT SUPPORT

Arms, logistics or safe havens give rebels staying power and create a proxy confrontation.

DIRECT ENTRY

Risk of interstate war on the Red Sea coast.

INTERNAL WAR  INTERSTATE WAR

NEXT ONE TO THREE MONTHS

Three scenarios: the risk is a long war that slowly spreads

Federal advantages in manpower, air power and external supply make a rebel march on Addis Ababa, as threatened in 2021, unlikely. A rapid federal victory is equally unlikely.

LIKELIHOOD: LOW

Short war, renewed ceasefire

Neither side breaks through; losses and international pressure bring both back to AU-led talks under the Pretoria framework. Lines freeze; Western Tigray, the displaced and Tigray's status are deferred.

Requires: a mediator the TPLF accepts. None currently exists.

LIKELIHOOD: MOST LIKELY

Protracted war of attrition

Fighting concentrates on the Tigray–Afar and Tigray–Amhara boundaries. Federal drones blunt advances in open ground; Tigray's mountains prevent a federal knockout. Fano and the OLA intensify insurgencies, but coordination stays loose.

Consequence: sharp humanitarian deterioration under a communications blackout.

LIKELIHOOD: LOW TO MODERATE

Multi-front national war

Eritrea moves to open backing or direct deployment, the alliance achieves real coordination, and fighting in Afar threatens the Djibouti corridor. Simultaneous pressure across several regions.

Consequence: risk of state fragmentation and a regional war.

PUSHES TOWARD ESCALATION

- ▲ Direct or open Eritrean involvement
- ▲ Fighting reaching the Addis–Djibouti corridor in Afar
- ▲ Real joint operations across the alliance

PUSHES TOWARD DE-ESCALATION

- ▼ A mediator the TPLF accepts under the Pretoria framework
- ▼ Restoration of flights and telecoms in the north
- ▼ Public splits over Western Tigray, weakening the alliance

Bar length indicates relative likelihood (qualitative ThreatRate assessment, not a probability).

SPILLOVER

An Ethiopian crisis with Horn of Africa reach

Djibouti corridor

CRITICAL

Runs through Afar. Fighting is in northern Afar and the corridor is not cut, but any southward spread would threaten fuel, food and imports, and Djibouti's port revenues.

Humanitarian

CRITICAL

~750,000 already displaced in Tigray. New displacement in Afar and Amhara cannot yet be quantified. Blackout, flight suspensions and a reported drone strike on a Catholic Relief Services convoy limit access.

Sudan

HIGH

Already in civil war and bordering Western Tigray. Risk of refugee flows, armed groups and cross-border supply along the frontier.

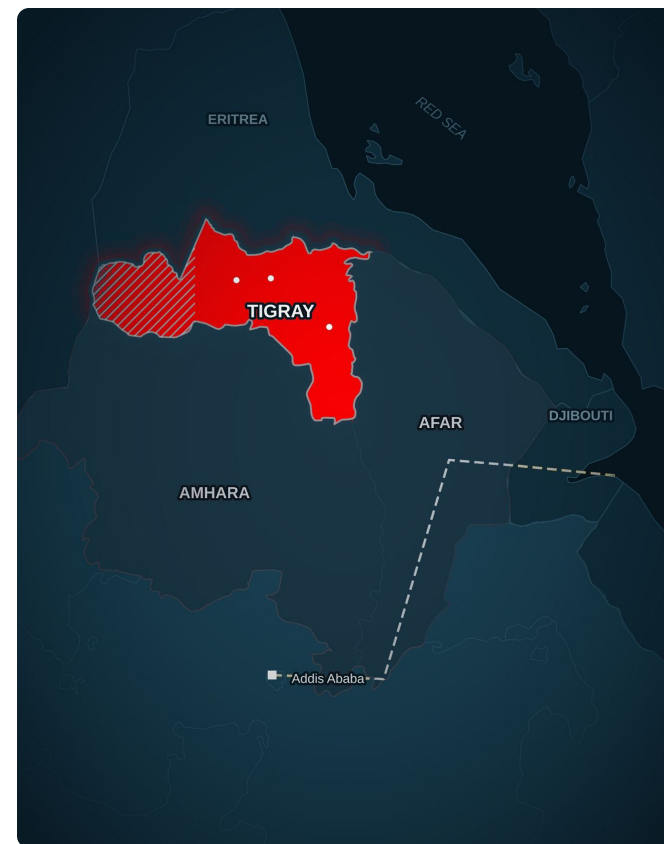
Somalia & Red Sea

HIGH

A long war diverts Ethiopian troops from Somalia; ONLF membership extends instability to the Somali Region, in a Red Sea zone strained by Houthi activity and Gulf port competition.

INTERNATIONAL RESPONSE

The UN Secretary-General warned of a "broader and more devastating conflict" and backed AU mediation. The AU called for direct talks; IGAD and the EU urged de-escalation. The US has taken a comparatively hard line against the TPLF: Ambassador Ervin Massinga called its offensive an "unwinnable fight" and warned of further sanctions.



Map: ThreatRate. Tigray and disputed Western Tigray (hatched); dashed line marks the Addis-Djibouti corridor



Single point of failure. Share of Ethiopia's trade by volume on the Addis-Djibouti corridor.

WHAT TO DO NOW

Guidance for organisations with people or supply chains in Ethiopia

AREA	RISK	GUIDANCE
Travel	EXTREME	Avoid all travel to Tigray and Afar and to the Amhara zones of North Wollo, Wag Hemra and Lasta, including Lalibela. The US prohibits its government personnel from travelling to Tigray and Afar.
Air access	EXTREME	Mekelle, Axum, Shire and Lalibela airports are closed or under rebel control. Expect further flight suspensions in the north at short notice.
Communications	HIGH	Networks are down across Tigray and parts of the north. Staff in affected areas need satellite communications and pre-agreed check-in procedures.
Supply chains	HIGH	Review Djibouti corridor contingency plans, including fuel stocks and alternative routing via Berbera, in case fighting moves south in Afar.
Kidnap & crime	HIGH	Kidnap for ransom already recurs in Amhara and Oromia. A wider war and diverted security forces are likely to increase it, including on major roads out of Addis Ababa.
Addis Ababa	ELEVATED	Not militarily threatened. Expect heightened security, checkpoints, possible emergency measures and arrests of people perceived as Tigrayan or opposition-aligned.

2

regions to avoid entirely: Tigray and Afar

3

Amhara zones to avoid: North Wollo, Wag Hemra, Lasta

4

northern airports closed or rebel-held

Berbera

alternative routing if the Djibouti corridor is disrupted

EARLY WARNING DASHBOARD

Indicators to monitor

● Eritrea

Troop movements on the border, confirmed arms flows, or Ethiopian strikes on Eritrean territory.

▲ ESCALATION

● Afar & Djibouti corridor

Fighting south of Semera, disruption on the Awash–Galafi road, or fuel shortages in Addis Ababa.

▲ ESCALATION

● Western Tigray

A Tigrayan offensive across the Tekeze toward Humera.

▲ ESCALATION

● Alliance cohesion

Joint operations beyond TPLF–Fano (escalation), or public disputes over Western Tigray (fragmentation).

▲▼ EITHER WAY

● Federal response

Mass mobilisation, a nationwide state of emergency, or a large-scale drone campaign on Mekelle.

▲ ESCALATION

● Mediation

A mediator acceptable to both sides, or restoration of flights and telecoms as a de-escalation signal.

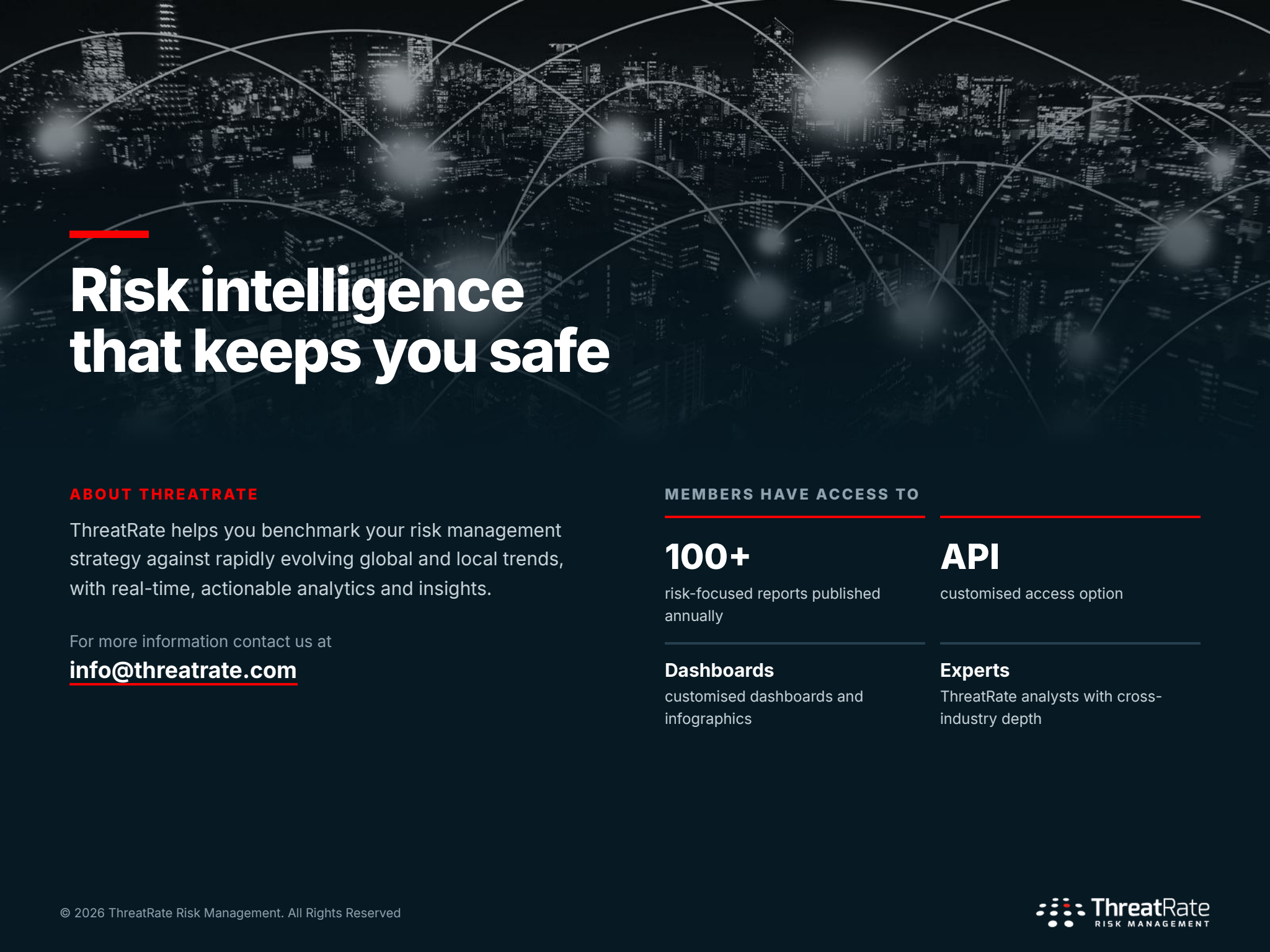
▼ DE-ESCALATION

The decisive question is not whether the TPLF can take more territory, but whether the alliance can turn separate insurgencies into coordinated pressure on Addis Ababa. At present it cannot.

CONCLUSION

This is not a replay of 2020. Then, the federal government, backed by Eritrea and Amhara forces, faced a largely isolated TPLF. Now it faces Tigrayan forces, Fano and several regional insurgencies at once, while its former Eritrean ally has become a suspected adversary.

The most likely trajectory is a protracted northern war that slowly draws in more of the country. The most dangerous is direct Eritrean involvement or disruption of the Djibouti corridor, either of which would turn an Ethiopian crisis into a Horn of Africa crisis. A durable settlement must address the questions Pretoria left open, not simply freeze the front lines.



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