

## BLUE LINES

*The political stock of President Cyril Ramaphosa has risen since US President Donald Trump berated him in the Oval Office on 21 May. Ramaphosa had been hoping to reset relations between the two countries after months of critiques from Trump and his advisor Elon Musk, the South African-born chief of Tesla and Starlink. Instead, he found himself refuting Trump's false claims of 'genocide' against white farmers in South Africa. Vincent Magwenya, Ramaphosa's spokesman, called it a 'well-orchestrated, well-planned ambush'. Ramaphosa didn't take the bait. His position was strengthened by the backing of two major-winning golfers, Ernie Els and Retief Goosen, as well as the billionaire Afrikaner business mogul Johann Rupert, who diplomatically contradicted Trump's claims. In preparatory meetings in Washington, Ramaphosa had offered to buy US gas and open up critical mineral exploitation to US companies. We hear that the conversation got more constructive after the press conference ended. Ramaphosa was given some signals of US willingness to cooperate with South Africa's presidency of the G20. But governments in Africa are asking what the encounter portends for US relations with other states on the continent. Writing in the Guardian, Ghana's President John Dramani Mahama condemned Trump's claims of a white genocide as an 'insult against all Africans'. Battle has been joined.*

## SUDAN

# How Hemeti's drone attacks reshaped the war

**After the latest strikes on Port Sudan, the rival factions may have to choose between total war or negotiations**

When the Rapid Support Forces launched a fusillade of drones against Port Sudan on 4 May, they once again changed the terms of engagement in the devastating two-year civil war. Backed by the United Arab Emirates, the RSF targeted oil facilities, a power station, a hotel frequented by top officials and foreign diplomats, as well as offices used by the Sudan Armed Forces (SAF) leadership.

RSF Commander General Mohamed Hamdan Dagalo 'Hemeti', sent a clear and explosive message: no strategic facility was beyond his forces' reach. Just weeks earlier, his rival, SAF Commander Gen Abdel Fattah al Burhan, had been celebrating after driving Hemeti's forces from the war-shattered capital, at terrible human and material cost. With control of Khartoum secured, SAF and allied militia groups moved to consolidate their control across the country (Dispatches 24/3/25 & AC Vol 66 No 7).

Two priorities emerged: dividing reconstruction funds, with pledges already made by Saudi Arabia, Qatar, and Turkey, and determining the next phase – either strengthening their hold on territories taken from the RSF or launching a full-scale offensive into Kordofan and Darfur.

Discussions were intense, with numerous disagreements. Some who had financed the SAF's new military supplies sought to recover their investment, while others, including more militant Islamists, aimed to secure North Kordofan and extend the conflict into South Darfur.

Gen Burhan navigated competing

factions, trying to prevent major tensions within the army and between the SAF and its largely Islamist-backed militia allies. The SAF attack on Nyala Airport on 3 May was not a strategic advance but part of a plan to dismantle the RSF's supply network via UAE logistical lines.

We hear that the bombing killed dozens of RSF fighters, wounded many, including foreigners awaiting evacuation, as well as officials from the UAE, including one linked to Mohammed bin Zayed al Nahayan's family. Two East African pilots were also among the dead.

This attack may have prompted the RSF to use its most advanced drones, striking previously off-limits areas.

## BLIND EYE

Formal condemnation of the tactics has little effect on the rival forces. Both sides disregard civilian protection and international law. While the RSF faces accusations of mass civilian killings by the United States, the European Union and the UN, its leading sponsor – the UAE – faces no effective censure.

Likewise, Egypt, Turkey and Iran, the main backers of Gen Burhan, attract little approbation for fuelling the conflict. Yet the SAF was sanctioned directly by the US State Department on 23 May, accused of using chlorine gas last year.

A partition of Sudan now looks more unlikely. The RSF's drone attacks of 4 May have eroded the idea of fixed frontlines. It also undermines the SAF plan to rebuild eastern Sudan while waging war against the RSF in Darfur and Kordofan. That leaves a

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clear choice of total war or negotiations.

The RSF has not claimed responsibility for the Port Sudan attack on 4 May, which targeted dual-use infrastructure with precision. Security experts and diplomats generally agree the RSF fired newly acquired long-range drones and guided missiles – Feihong FH 95 and Wing Loong II and GB 500A, alongside suicide drones such as the Chinese-made Sunflower 200.

Some reports suggest the drones were launched from Bossaso in Puntland. But a more plausible scenario is that intelligence and target coordinates were obtained via a drone launched from Bossaso, or possibly from an Emirati warship, while the strikes were carried out by drones operating from Darfur and Kordofan.

These assessments raise questions about links between the Nyala attack on 3 May and the counterstrike on 5 May, and signal that Abu Dhabi may have crossed the line from proxy support to direct engagement. The RSF faces mounting military challenges despite efforts to improve operational planning and troop coordination in Darfur.

The repeated loss and recapture of northern Darfur cities, such as Al Maliha and Al Atroun, offer little strategic value but force the RSF to stretch its forces around El Fasher, deploying fresh troops

for fleeting gains. This reflects the war of attrition senior officers in Khartoum seek to impose on the RSF.

Thanks to UAE support, RSF planning is more effective, but maintaining a coherent command structure remains a challenge. This problem may worsen as the RSF launches a recruitment drive in Chad – specifically in Salamat and Dar Silla – aiming to enlist over 6,000 fighters before the rainy season. High casualties and frequent turnover continue to hinder efforts to build a stable chain of command, despite senior RSF officers pushing to restructure operations.

The flow of UAE weapons and equipment has intensified since the Port Sudan attack. Western diplomats report that after the SAF seized Khartoum in late March, Abu Dhabi proposed direct talks, offering a compromise in which the RSF would remain but with a diminished role under SAF authority.

After the SAF rejected the offer, the UAE altered its approach. We hear that convoys of trucks carrying military hardware now move from Mombasa to South Sudan and Darfur via Uganda, despite concerns from Kenyan security officials, who cannot override President William Ruto's approval. Chad has become a less significant transit point due to mounting challenges to President Mahamat Déby's regime, while Libya, Central African Republic, and South Sudan are now preferred routes for UAE arms shipments to the RSF.

Politically, the RSF faces growing difficulties. It announced plans for a parallel government in February, but negotiations remain stalled (AC Vol 66 Nos 4 & 5). An RSF-centred alliance meeting in Nairobi in early May ended without progress, and two weeks later, the initiative collapsed entirely.

Beyond international opposition, the RSF faces two major obstacles.

First, its proposed political alliance consists largely of western Sudanese figures, making a shadow cabinet appear regional and parochial, far from the nationally representative body that Hemeti envisions.

His immediate challenge is accommodating Abdelaziz al Hilu's ambitions; securing his agreement would be a strategic gain for the RSF. Abdelaziz foresaw South Sudan's current crisis and recognised that support from his Sudan People's Liberation Movement-North (SPLM-N) comrades – which had sustained him for years – was waning.

Allying with Hemeti is his response to this challenge and a means of easing tensions with the Hawazma tribe in South Kordofan, which falls under RSF control. Abdelaziz also opposes the resurgence of Islamists in Khartoum and advocates an alliance of marginalised groups against the *Djellaba* – the riverine elite. The RSF readily claims its new regime will adopt a secular constitution, one of Abdelaziz's key demands. Abdelaziz argues he is well-qualified to lead an alternative national government, having fought Khartoum's regimes for decades and belonging to the Massalit ethnic group. But Hemeti refuses to take a deputy role, having initiated the war two years ago. He is also partly financing the conflict and serves as the primary intermediary with the key sponsor, Abu Dhabi.

Reports that the RSF is printing new banknotes for western Sudan haven't been confirmed, but they suggest worsening economic fragmentation alongside deepening political fractures.

In response to the deadlock in western Sudan, some business figures, particularly those who helped fund the war, appear resigned to a partition of sorts. They may believe that separating from eastern Sudan will allow them to rebuild their enterprises and recover investments in the region. ●

## SUDAN/SOMALIA/TURKEY/UAE/SAUDI ARABIA

# Stormy weather in the Red Sea

## Shifting affiliations and military manoeuvres across the Horn and the Gulf are fuelling tensions

**R**egional players are adjusting their strategies as conflicts in the Horn of Africa intensify. United States President Donald Trump's three-country trip to the Gulf from 16 to 19 May did not clarify US policy towards the region's crises or its attitude towards possible mediation. In response to Trump's speech, Saudi Prime Minister

and Crown Prince Mohammed bin Salman mentioned the Sudan civil war and stated his intention to restart the Jeddah process. He did not elaborate on whether the framework would be the same as before.

The US president stayed silent and proceeded to Abu Dhabi and Doha in search of new investment. No mention

was made of Somalia or Ethiopia, though the US may soon significantly reduce its military presence in Somalia. Serious differences are emerging over the excessive military expansion along the Horn's shores, the United Arab Emirates-Turkey rivalry in Somalia and Sudan, and Riyadh's shifting stance, now leaning towards Cairo and Doha against Abu Dhabi (AC Vol 65 No 8).

Growing military activity in the Red Sea and Gulf of Aden worries many of the regional powers. In January 2020, Riyadh and seven other Red Sea states formed the Council of Arab and African Coastal States of the Red Sea and Gulf of Aden to foster cooperation and combat piracy, smuggling and other threats.

But Saudi Arabia failed to energise the

group or take decisive action. Ethiopia was denied membership despite being the Horn's economic powerhouse. It has a large stake in the region due to its search for access to the sea (AC Vol 62 No 12).

Tensions are rising as both longstanding and emerging foreign powers are trying to expand their military presence. But the Gulf Cooperation Council appears divided and powerless. Djibouti has been a key hub for foreign militaries for decades. France renewed its defence agreement with Djibouti in July 2024, while the US's Camp Lemonnier, established in 2001, focuses on counterterrorism and Iranian activities in the Gulf of Aden (Dispatches 21/5/24). Today, *Da'esh* and *Al Shabaab* in Somalia, alongside the Houthis in Yemen, remain its primary intelligence targets.

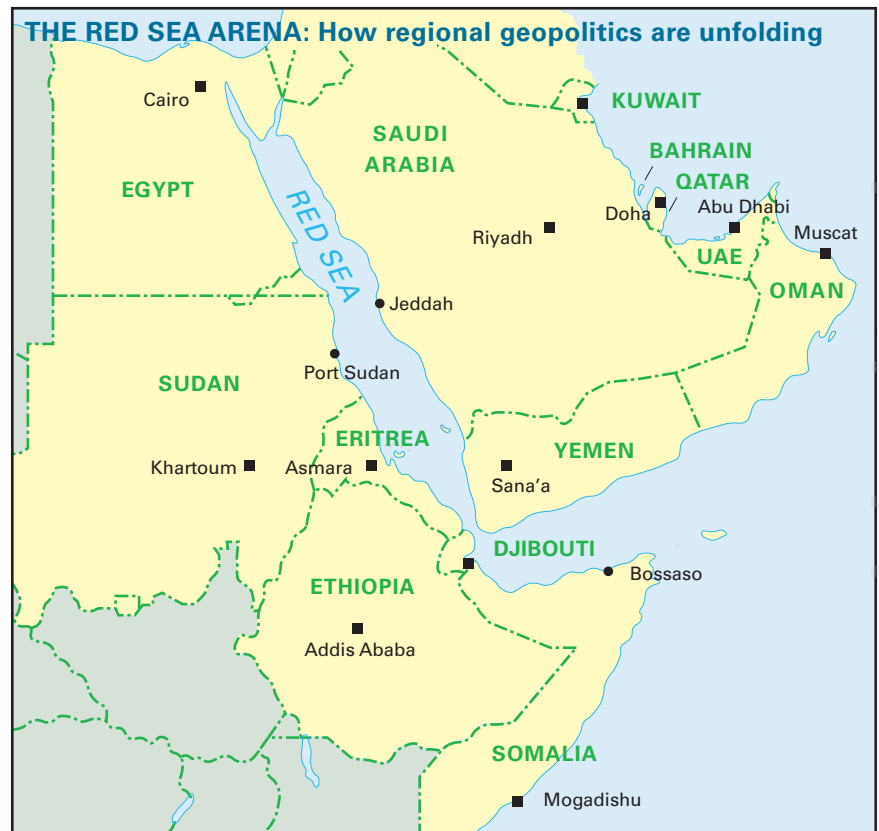
China secured a military base there in 2017, frustrating western nations. Japan and Germany also maintain facilities in Djibouti. It has a strategic location but Djibouti wields limited regional influence. Its former Foreign Minister, Mahmoud Ali Youssouf, now Chair of the African Union Commission, struggles to push the AU into action on regional crises. The AU Support and Stabilisation Mission in Somalia has been weakened by funding shortages.

Russia has been pursuing a military base near Port Sudan since 2017. In February, Khartoum's former Foreign Minister Ali Yousif visited Moscow seeking military support but later denied making such a request. He has now been replaced by Omar Siddiq, a veteran diplomat whose last post was ambassador to Beijing.

Moscow knows the Sudan Armed Forces-led government is oscillating between it and western powers and Gulf States. The SAF and its allied militias need new military hardware, including ammunition and jet spare parts. In exchange, the SAF has permitted up to four Russian warships to dock in Port Sudan harbour.

Conservative Arab states oppose Moscow's military presence in the Red Sea region. Saudi Arabia refuses to accept a Russian base within 300km of Jeddah, while Jordan and Egypt fear global tensions could threaten the region's security. That forces SAF leader General Abdel Fattah al Burhan to tread carefully, avoiding conflict with Riyadh, which has promised to fund Khartoum's reconstruction.

In January 2018, Turkey struck a deal with then President Omer el Beshir to develop Suakin Island, but no work has started. Regional Arab states opposed the decision, citing hostility to Islamists and the Muslim Brotherhood as a key concern. The presence of Sudanese



Islamist figures in Turkey reinforced concerns that Ankara is becoming more important in the SAF's efforts to regain control of western Sudan.

The acquisition of six Bayraktar TB2 drones was crucial to the September 2024 offensive, reclaiming RSF-held territory east of the Nile, including Khartoum. These drones also carried out devastating strikes on Nyala Airport, a key Rapid Support Forces (RSF) asset.

In February 2024, Turkey signed a defence agreement with Somalia's Federal Government (Dispatches 28/2/24). By April, it had deployed 300 special forces and 200 technicians to manage Bayraktar Akinci and Bayraktar TB2 drones in Mogadishu. A further 2,000 troops are expected soon, bolstering the fight against *Al Shabaab* ahead of the 2026 elections. This costly military cooperation is complemented by a profitable oil and gas exploration deal, the terms of which remain opaque.

Turkey's regional policies remain closely tied to Qatari interests. During a July 2024 visit to Doha, Somali Prime Minister Hamza Abdi Barre expressed frustration with Qatar's limited financial support. Qatari Prime Minister and Minister of Foreign Affairs, Mohammed bin Abdulrahman bin Jassim Al Thani, responded that Doha was funding much of Turkey's military presence in Somalia, including the TB2 and Akinci drones deployed against *Al Shabaab*.

Turkey faces domestic economic challenges, and Doha's financial support

is crucial to maintaining its activist policy in the Horn of Africa. Qatar keeps a low profile, avoiding confrontation with Gulf neighbours since the Al-Ula Declaration in January 2021. However, its distrust of the UAE remains strong, with old Islamist alliances still influential.

Iran's Red Sea presence is shaped by sanctions-driven opportunities. In 1991, it established ties with Sudan, assisting in the civil war, training its security forces and supporting Hamas. Diplomatic relations were severed in 2016 after the attack on the Saudi embassy in Tehran.

Diplomatic relations were restored last July, when the SAF sought military aid, acquiring Mohajer-2, Mohajer-4, and Mohajer-6 drones. Dozens of Iranian military experts are now stationed in camps near Port Sudan, managing drone operations and training Islamist militias, including *Al Bara bin Malik*. Iran is also helping restore military factories it built in the 1990s, which were looted and partially destroyed after the civil war began.

Saudi Arabia remains concerned by Iran's presence in the Red Sea, especially in Sudan. Riyadh's relations with Burhan improved last year, reflecting its unease over the UAE's assertiveness in Sudan's civil war.

The Saudi-UAE rivalry is evident in several areas. Yet both leaders maintained a friendly facade when President Trump visited. Both monarchs are hostile to Islamists and



wary of Turkey's growing influence in the Horn and Syria, their differences are widening.

The Jeddah process, launched in May 2023, failed due to UAE support for the RSF and the SAF's unwillingness to compromise. Now Riyadh wants to consolidate Sudan's military

against hard-line Islamists, while also undermining its Gulf rival. The UAE's aggressive Somalia policy is viewed negatively, as it indirectly benefits *Al Shabaab* and allows Turkey to expand its foothold in the region.

Riyadh remains bitter over the UAE's disengagement from Yemen and

its support for factions in Southern Yemen, which undermined Saudi-backed policies. Saudi statements suggest frustration at the UAE's military ambitions, arguing that Abu Dhabi, as a non-riverine state, should abandon plans for a permanent military presence in Bossaso or Berbera. ●

## ETHIOPIA

# Abiy bans Tigray party, risking new war

**After a devastating two-year war with Addis Ababa, the TPLF faces bureaucratic extinction**

**W**hen the National Election Board of Ethiopia (NEBE) deregistered the Tigray People's Liberation Front on 14 May, it raised fears of a new war in northern Ethiopia. This bureaucratic move could turn into a political flashpoint. Dissolving the TPLF, the dominant political force in northern Ethiopia from 1991-2018, by legal fiat is a high-risk tactic by the federal government under Prime Minister **Abiy Ahmed**.

The board cited the TPLF's failure to hold a congress in accordance with electoral rules, raising fears of a return to war in northern Ethiopia given divisions in Tigray and TPLF anger at the federal decision.

For the TPLF, which signed the Pretoria Agreement alongside the federal government in November 2022 ending two years of war, the move is a calculated attempt by Addis Ababa to eliminate it (AC Vol 65 No 15). It contends that the peace agreement re-legitimised it after it was banned by the electoral board during the war.

According to the TPLF leadership, the party's subsequent delisting as a terrorist organisation signalled its return to lawful political activity. It then demanded reinstatement, and refused to jump through bureaucratic hoops to re-register as a new party.

The board insists that it is purely a question of legality. The use of such administrative measures points to a broader trend in Ethiopia. For activists, insisting on re-registration and now deregistering the TPLF is less about due process and more about power: a means to destroy the party that led Ethiopia for nearly three decades, but was weakened by war and, now, internal fragmentation.

Behind the deregistration, the manoeuvring of rival factions in Tigray provided an opening for federal officials to exploit. The TPLF, the standard-bearer of Tigrayan nationalism and inseparable

from Tigray's regional administration, was challenged by dissenting regional officials calling for reform.

A prominent alternative voice is **Getachew Reda**, a former TPLF politburo member and spokesman for the Tigray Defence Forces (TDF) during the war. Until recently, he was the interim president of Tigray.

Opposition from within the party to his leadership led to his allies in the TPLF Central Committee splitting from the leadership. Along with Getachew, they were removed from the party's upper echelons. The TPLF then allied with a powerful regional security apparatus to take back control of Tigray's government. Getachew, a former federal minister, fled to Addis Ababa and cut a deal with Abiy, accepting a role as his advisor on East African affairs.

After that, Getachew formed a new party, which NEBE quickly registered. It is unlikely to win much support in Tigray (AC Vol 66 No 6). Perhaps to some in the region, particularly younger constituents in the capital Mekelle, Getachew represents a reformist voice – as opposed to the old guard and the hard left veterans of the TPLF's rebel days back in the 1980s. Yet Getachew's credibility in the region is limited – especially that he's allied with a regime seen as genocidal by many in Tigray due to its brutal tactics during the war.

While he has a base in southern Tigray, Getachew lacks roots in the region's northern areas, where the TPLF is still heavily supported. Getachew is widely seen as Abiy's latest Tigrayan alternative; such leaders have fared badly in Tigray in the past.

The new interim president of Tigray, **Tadesse Worede**, was formerly commander-in-chief of the TDF. He is respected within the TPLF and is seen as loyal. But there are criticisms from the party about agreements he has signed with the federal government,

including a Terms of Reference on Disarmament, Demobilization, and Reintegration (DDR). The TPLF sees these as conflicting with the Pretoria Agreement. But publicly it continues to support him: if only because they see him as 'our man', a lesser evil compared to Getachew.

Tadesse has shown little appetite for accumulating political power, which reassures the TPLF's elite. Unlike Getachew, Tadesse prefers a lower-key leadership role. For now, the interim government in Tigray is a balancing act: managing the promises of the Pretoria agreement while containing internal discontent.

## ETHNIC ENTANGLEMENTS

Wider disagreements over the future of Ethiopia's ethnic federalism are coming to the fore. The TPLF has recently called on other armed groups to unite in defence of the ethnic federal model enshrined in Ethiopia's constitution. That call that resonates amid fears that Abiy's centralising plans may ban ethnic-based political parties and reduce regional autonomy.

The TDF allied with separatist group the Oromo Liberation Army during the 2020-22 Tigray war but that partnership soon fizzled. Still fighting in Oromia, the OLA has also faced its own internal challenges. Recently, a central commander and his insurgents defected to the authorities after signing a peace deal. Some other ethno-nationalist insurgent groups are weakening.

More complex is the plan for a TPLF alliance with Fano, the loose network of Amhara nationalist militias fighting the government in Amhara region.

As with the Tigrayan dealings with Eritrea's President **Issayas Afewerki**, this would very much be an 'enemy of my enemy is my friend' arrangement. Fano and the TPLF were on opposite sides of a civil war.

There is an unresolved Amhara-Tigray disagreement over Western Tigray, which Amhara leaders declared as 'reclaimed' due to historical narratives of Amhara ownership. The silence from Addis Ababa on the issue further alienates the TPLF and underscores its argument that the federal government tacitly supports territorial revisionism at Tigray's expense. ●

## HOT AND COLD WARS IN TIGRAY

The Tigray Defence Forces (TDF), despite lacking most of its heavy armaments, remains a serious military player. Some of its fighters, primarily women and disabled veterans, have been demobilised but the majority remain in camps.

Progress on the Disarmament, Demobilisation and Reintegration (DDR) plans has stalled due to the continued presence of **Eritrean** forces in Tigray. The TPLF and many Tigrayans expected those forces to leave Tigray region under the terms of the Pretoria Agreement. Renewed conflict remains a risk not least because the TDF's loyalty remains with the TPLF leadership but it's unclear whether Tigrayans would mobilise en masse for another war if the party came to blows with the federal government again.

This year, the reputation of Tigray's military class has been hit by allegations of corruption and involvement in illegal mining by TDF commanders. That information may have been planted by federal officers to discredit the group.

When amplified by Addis-based media, these narratives signal a troubling escalation between the federal government and the TPLF. What's more, there are constant suggestions of growing contacts between the TPLF and Eritrea, with cross-border movement already increasing at Zalambessa.

Eritrea's President **Issayas Afewerki** allied with Abiy during the war to try and destroy his historic enemies in the TPLF, blocking Tigray from becoming a regional rival. But the two leaders fell out post-Pretoria: especially as Abiy's interest grew in Red Sea ports such as Eritrea's Assab. Issayas, a Machiavellian, may now be willing to work with the TPLF against Abiy.

Beyond the legal, political and military developments, a cold war is being waged in the media. The TPLF has launched appeals to the African Union and the **United States**, calling on them to enforce the Pretoria Agreement and protect Tigray's political space. Yet the federal government has mobilised its own media loyalists to portray the TPLF as non-compliant, corrupt and increasingly irrelevant.

This propaganda war reveals a deeper strategic game. By pushing the TPLF to the margins, the federal government hopes to eliminate it as a viable political entity. In doing so, space opens for alternative Tigrayan figures like **Getachew Reda** to rise, advancing Prime Minister **Abiy Ahmed's** broader project to refashion Ethiopian politics.

The risks are clear. The TPLF has not disappeared and despite the National Election Board of Ethiopia's decision it has reasserted itself at the regional level with the exodus of Getachew's faction to Addis. If the TPLF, TDF and other segments in Tigrayan politics feel they have no future within Ethiopia's legal and political structures, the possibility of renewed conflict increases, especially if they move closer to Asmara as they push for greater autonomy from Addis. While all sides claim to seek peace, the combination of unresolved grievances, institutional exclusion and military readiness creates a dangerous brew.

Ethiopia may stand at another crossroads. The Pretoria Agreement offered a fragile but vital peace. The next move, whether in the court room, the ballot box or on the battlefield, may determine not only the fate of the TPLF but the future of Ethiopia's federal experiment. ●

## AFRICA/FRANCE

# Paris all at sea over Africa reset

## President Macron's new policy ideas keep foundering on the domestic priorities of African leaders

Two more sharp reminders of the cultural and political realities have jolted President **Emmanuel Macron** as he struggles to reshape France's relations with Africa which have reached a nadir under his presidency. Macron, as France's first post-colonial President, has become its most unpopular leader on the African street.

Back in April during his trip to Antananarivo, Macron announced that France and **Madagascar** had formed a commission to discuss the future of the *Îles Éparses* (Scattered Islands), whose sovereignty they contest. Three weeks later, that strategy was interrupted by Madagascar's President **Andry Rajoelina** stating his desire to visit the almost uninhabited archipelago, a move calculated to boost Malagasy support for its ownership claim.

This diplomatic cold shower was reminiscent of **Senegal's** sudden demand for the closure of French military

bases even as President **Bassirou Diomaye Faye** was lauding Macron for acknowledging that the French colonial army massacred Senegalese soldiers at Thiaroye in 1944 (AC Vol 65 No 25).

In both cases, as often during the French president's eight years in office, historical wounds and ruthless domestic politics have complicated his efforts to reform policy. The most serious change was France's enforced withdrawal from the Sahel as resentment simmered in the region. That coincided with Macron planning a gradual reduction of France's military presence in favour of more training and technical support. The Sahelian juntas' expulsion of French troops was a loud rebuff for Paris but also for Macron's leadership.

The consequent chill in relations with the juntas in **Mali**, **Burkina Faso** and **Niger** has further complicated ties. In August 2021, the French government's new overseas aid law had

specified Sahelian countries as priority recipients of development assistance. Since the seizure of power by military officers, Paris has halted budget support, preferring to channel funds through civic groups directly for development projects. This has become harder as the military clamp down on civil society.

Yet Macron pressed on with the overhaul of French cultural, diplomatic and economic engagement with Africa started in the early months of his presidency. After the expulsions from the Sahel, sceptics concluded that 'soft power' is all that is left for Paris as it struggles to maintain relevance. A French politician who has spent decades on African issues admits to being at a loss as to how to move forward.

Yet advocates for Macron's approach argue that the wave of coups and anti-French sentiment, and the injustice felt by younger Africans, show the need for a urgent reset. That could include reform of the CFA franc single currency, whose peg to the euro is guaranteed by Paris.

## NEW HISTORY

At the core of this is an effort to address the wounds left by France's colonial past through a process of accounting and remembrance. Macron sees this as a crucial foundation for forging new relationships. In Antananarivo, Macron

and Rajoelina agreed to establish a joint committee of historians to research decolonisation violence and what the French president admitted were 'atrocities' when colonial troops killed thousands as they crushed a pro-independence Malagasy uprising in 1947.

The process of remembrance and historical enquiry – similar efforts led by historians have already reported on **Algeria's** independence war and the **Rwandan** genocide, and inquiries in **Cameroon** and **Senegal** are ongoing – can produce discomfort, not just for the French but also for Africans, some of whose forbears sided with colonial powers (AC Vol 62 No 21 & Vol 61 No 11).

Less painful has been the return to Madagascar, **Benin**, **Senegal**, and soon also **Côte d'Ivoire**, of artefacts looted during the colonial era. In August, Paris's Natural History Museum will repatriate to Antananarivo the skulls of King **Toera** and two fellow Sakalava notables decapitated by the French. This will highlight the contribution of the often-marginalised Sakalava community to a Malagasy national story dominated by the highland Merina elite.

Such gestures may help heal wounds of the past, although this can be undone by an undiplomatic comment from Macron. In January his complaint about a lack of Sahelian 'gratitude' for French military assistance was widely resented as arrogant. It incinerated much of the goodwill earned through the painstaking diplomacy of his envoy, **Jean-Marie Bockel** last year.

France is one of many western powers reshaping African policy. Washington has taken the most dramatic action, shutting down the United States Agency for International Development (USAID) and now the Millennium Challenge Corporation. **Britain** has cut its aid budget by over 20% as it promises a fresh 'approach' to Africa. Yet **Spain** and **Italy** have stepped up development support, particularly in West Africa. **Canada's** new premier **Mark Carney** pledges not to cut aid and civic groups hope he might be persuaded to increase it.

France remains committed to engagement with Africa, notably on environmental priorities such as Congo basin rainforest conservation, the Great Green Wall anti-desertification initiative, as well as regular development funding. It supports, as does the European Union, having permanent African members of the UN Security Council and wants to reinforce relations with Anglophone and Lusophone Africa. Last year saw a state visit to France for **Nigeria's** President **Bola Ahmed Tinubu**, while in 2026 **Kenya** will host the Africa-France summit. Macron's wooing of Anglophone Africa, especially **Nigeria**, highlights the dual track in French policy.

At the beginning of May, relations with the Sahel plummeted further as the Niger junta detained the local Chief Executive of France's Orano, the uranium mining company that was accused of underpaying for the resource.

A few days later, Niamey opened talks with Moscow about selling 700 tonnes of yellowcake that it had blocked Orano from exporting to France. No news has been released about the fate of the Orano executive.

Two weeks later, **South Africa's** Deputy President **Paul Mashatile** led an investment delegation to Paris. During Mashatile's visit, it emerged that France is offering full backing for South Africa's chairing of the G20, just as **United States** President **Donald Trump** is threatening to boycott the summit in November.

There are also attempts to broaden engagement into initiatives involving youth and civil society, as seen during an atypical last Africa-France summit in Montpellier in 2021. One African speaker called on Macron to drop the 'paternalistic-pseudo' co-operation with the continent. Emotions have intensified since then after a spate of *coups d'état*.

Yet the push to reach out to the African diaspora and dual nationality community in France continues. One aim is to refresh French diplomacy across the continent and attract more applicants from beyond the central Parisian recruitment base. The Foreign Ministry has adjusted its recruitment exams to this year introduce an exam tailored to recruit diplomats who want to specialise in Africa, including those with a family background in the region. Language skill tests may be broadened from Hausa, Swahili and Mandingo to include Wolof, Bambara and Peulh. ●

## AFRICAN DEVELOPMENT BANK

# Capital dominates the race to run Africa's biggest bank

## Shrinking funds will force the new president to be more creative, tapping into Asia and the Gulf States

**T**he spiralling cost of capital, foundering efforts to restructure public debt and the election of a successor to **Akinwumi Adesina** as president of Development Bank (AfDB) are topping the agenda at its annual general meeting from 26-30 May in Abidjan. Adesina is due to step down in September after serving the maximum two five-year terms.

The AfDB runs a complex election for its presidency. Its 81 member countries all have a vote: they include 54 member states in the African Union and 27 non-regional shareholders such as the **United States**, **France** and **Saudi Arabia** with just over 40% of the bank's equity. A country's voting power is tied to the size of its shareholding. To win, a candidate

must secure a 'double majority': over 50% of the total vote (from all African and non-regional shareholders) and at least 50% of the votes from the African caucus (AC Vol 66 No 4).

Alongside the arithmetical weight of the votes are myriad political, personal and regional rivalries. To keep the lobbyists happy, some governments promise their votes to multiple candidates. Promised allegiances often shift wildly in successive rounds of voting – all theoretically held in secret ballots. But shifts in **Nigeria's** support – as the bank's biggest shareholder with 9% of the capital, it wields the most votes – are usually easy to detect.

The theme of the bank's annual general meeting is 'making capital

work for Africa's development' but the underlying focus is the lack of affordable capital on the continent. The ability to raise capital has become the main job qualification in the presidential election campaign.

Delegates were meeting against the backdrop of the bank's forecasts for Africa's economies in 2025. It projects average GDP growth across the continent at 3.9% compared with 3.3% last year. But the forecast is a 0.2% downgrade from earlier projections before the effects of the new United States tariffs kicked in.

The US accounts for just 5% of Africa's global trade but its tariffs are slowing other economies and depressing prices for many of Africa's commodity



## THE FIVE CONTENDERS TO RUN THE BANK

### Amadou Hott – SENEGAL

**Senegal's** Minister of Economy, Planning, and Cooperation from 2019 to September 2022, Amadou Hott is an impressive technocrat with a strong track record in raising climate finance but he has a few strikes against him. As a top official in President **Macky Sall's** government, he may not be assured of support by its successor under President **Bassirou Diomaye Faye**. Hott's relations with Diomaye Faye have also been strained by a report from Senegal's Court of Auditors, corroborated by the IMF, which found that the country's debt was deliberately understated by US\$6-7bn between 2019 and March 2024. Neither is it clear whether the Economic Community of West African States (Ecowas) will rally behind him. **Côte d'Ivoire** and **Ghana** are said to be backing **Mauritania's Sidi Ould Tah**, after his campaign arranged meetings with **Alassane Dramane Ouattara** and **John Dramani Mahama** respectively.

Hott has put investment in education and skills at the heart of his platform, arguing that the millions of young Africans entering the job market are struggling to find opportunities. He argues that the bank needs a leader who is 'technically capable and politically astute' and pledged to create a vice-president post dedicated to the private sector.

### Sidi Ould Tah – MAURITANIA

During his 10-year tenure at the Khartoum-based Arab Bank for Economic Development in Africa (*Banque Arabe pour le Développement Économique en Afrique*, BADEA), Sidi Ould Tah oversaw a 75% increase to \$7bn in total assets.

Along with managing strong relations with the oil-rich Gulf States, Ould Tah calls for AfDB to play a catalytic role and push for more effective coordination with other financial institutions in Africa: such as the Cairo-based Afreximbank and the Lagos-based Africa Finance Corporation.

Mauritania's Finance Ministry is strongly backing Ould Tah. It reckons it has locked up votes from the North African bloc – **Morocco, Tunisia, Libya** and **Egypt**, all of which are members of BADEA. **Algeria** may prefer to back **South Africa's Swazi Tshabalala** rather than Sidi due to Nouakchott's recent siding with Morocco in the dispute over Western Sahara. The Mauritanian government signed a short-term contract with **United States**-based lobbying giant APCO Worldwide, paying a \$148,500 fee for 'strategic communications, media relations and stakeholder engagement services' to support the campaign, according to a filing under the US State Department's Foreign Agents Registration Act.

Strongly backing Ould Tah's candidacy is **Tanzania's Frannie Léautier**, a former vice-president at the AfDB who dropped her own campaign for the post when he entered the race. Léautier led an earlier transition between presidents at the AfDB and is expected to play a key role should Ould Tah win.

### Bajabulile Swazi Tshabalala – SOUTH AFRICA

The only woman in the race, Swazi Tshabalala has run a diplomatically savvy campaign, drawing on her track record as a chief finance officer and then senior vice-president in the AfDB. Coming from commercial banking, she is pushing what she calls 'hybrid capital' which blends debt and equity financing and could allow multilateral banks to raise longer-term financing without relying solely on shareholder funds. As traditional sources of finance dry up or become unsustainable, the AfDB will have to seek out more creative financing strategies.

One of those should include widening partnerships with

some of the smaller scale regional development institutions to implement cross-border infrastructure projects.

She argues that the bank must 'rise to a new level' to face to the tougher international environment, Africa's productivity gap and allied jobs crisis, she insists, is rooted in its infrastructure deficit. 'It is not possible to create jobs and industrialise without basic infrastructure,' she told the Brookings Institution debate.

Her campaign tagline, 'LiFT Africa', focuses on infrastructure and financial innovation. It was time for the AfDB to return its core mandate of infrastructure development, drawing on both public and private capital, she said. It should also focus relentlessly on delivery on the ground, rather than the quantum of approvals announced at Annual General Meetings.

### Abbas Mahamat Tolli – CHAD

Abbas Mahamat Tolli, a former governor of the *Banque des États de l'Afrique Centrale*, prioritised agriculture, food security, and infrastructure in his campaign. In his home region, he has led the modernisation of foreign exchange regimes and introduction of digital payments systems as well as the coordination of regional equities markets. Described as a 'banker's banker', Tolli has the strong support of home country, **Chad**, and most of the states in Central Africa. But the 11 states in the region command just 3.6% of voting strength in the AfDB. He also served as finance minister and infrastructure minister in Chad.

Reducing the infrastructure financing deficit in Africa, which Tolli calculates at \$150bn a year, would boost both the African Continental Free Trade Area (ACFTA) and industrialisation efforts according to this manifesto.

Another key component identified by Tolli is food security and the need to cut the tens of billions that African economies spend on unnecessary food imports each year. His remedy would be a massive upscaling of regional investment in farming, energy and industrial processing. Stronger monitoring on governance within the AfDB is required, said Tolli, along with identifying ways to speed up its internal systems and focus more determinedly on results rather than process.

### Samuel Maimbo – ZAMBIA

Samuel Maimbo's record as Vice-President for Budget, Performance Review and Strategic Planning at the World Bank could cut both ways. There he managed a \$5bn budget and led efforts to raise over \$90bn for the latest replenishment of the Bank's soft loan affiliate, the International Development Association (IDA). His track record in the Washington may impress technocrats but not those keen to rein in western influence on African institutions. Maimbo was chief of staff to **David Malpass**, who was appointed by US President **Donald Trump** to run the World Bank in 2019 but was forced into early retirement in 2023 under **Joe Biden's** presidency.

As the official candidate of the Southern African Development Community (SADC), the biggest and the second richest regional bloc in Africa, Maimbo should have had a head start. But Tshabalala's rival candidacy from South Africa has undermined that.

Insiders say that Maimbo, the official candidate of the SADC and the Common Market for Eastern and Southern Africa – the latter a bloc of 21 countries – has gained ground in the campaign in recent weeks (Dispatches 8/10/24).

Maimbo scored well in the Brookings debate, saying, 'We will need to take big bets and some of them will fail.' He has also promised to identify 15 projects most likely to succeed in the early days of his presidency. ●

exports. At least 21 of Africa's economies will grow by more 5% this year; **Ethiopia, Niger, Rwanda and Senegal** are forecast to grow by over 7% in 2025.

Of the five candidates vying for the AfDB Presidency, **Mauritania's Sidi Ould Tah** and **Zambia's Samuel Munzele Maimbo** have emerged as frontrunners. Both are talking up their success in raising capital for Africa: Ould Tah as head of the *Banque Arabe pour le Développement Économique en Afrique* (BADEA), and Maimbo as Vice-President of the World Bank.

An attempt by the Africa CEO Forum to run a debate on 13 May in Abidjan, where the bank is headquartered, was scuppered after **Chad's Abbas Mahamat Tolli**, former governor of the Bank of Central African States (*Banque des États de l'Afrique Centrale*), **South Africa's Bajabulile Swazi Tshabalala**, former senior vice-president of the AfDB, and Maimbo declined to participate. That would have just left Ould Tah and Senegal's former economy minister **Amadou Hott**, both of whom speak the two official languages of the bank (French and English) fluently, unlike the other three candidates.

All the candidates spoke at a debate organised by the Brookings Institution in Washington in April. Some shareholders told *Africa Confidential* they weren't impressed by the boycott in Abidjan which was to have been the only debate between the bank's presidential contenders in Africa. It's unclear whether it would cost the no-show candidates any votes.

Also under the microscope are the candidates' ties with the AfDB,

especially its current management. Tshabalala's role as Vice President in the bank and Hott's position as President Adesina's special envoy on climate may work against them; especially among shareholders who want to see wholesale change from the Adesina-led management of the bank.

Tshabalala, who has strong diplomatic skills, knows the AfDB inside-out and benefited from the personal support of South Africa's President **Cyril Ramaphosa**. We hear it was intense lobbying by Tshabalala's team that persuaded Ramaphosa to fly to Abidjan on 11 May to attend the Africa CEO Forum there and to endorse her candidacy for the top AfDB job.

### LEGACY

Outgoing President Adesina has spent much of his final year arguing that the bank must increase its private sector lending, taking on more risk within its portfolio (AC Vol 65 No 12). During his 10 years at the helm, the bank's capital has more than tripled from US\$93 billion to \$318bn. His successor is likely to continue that approach.

Adesina had to fight back hard against a campaign to oust him in 2020 after complaints by some bank officials claiming his appointments reflected favouritism and nepotism were circulated among governors of the bank (AC Vol 61 No 8). An ethics committee investigation into the claims cronyism finally exonerated Adesina (AC Vol 61 No 11).

Supporters of Adesina argue that he was able to strengthen the AfDB's balance sheet. Its earnings from loans

and investments in treasury securities rose by 123% to \$1.73bn in 2023; its net income before distribution reached \$545 million, the highest in the bank's history.

It is Africa's largest multilateral lender but the AfDB is small globally in terms of its capital base. Tougher international financing conditions mean the next president will face tighter constraints. US President **Donald Trump's** administration's proposed \$555m cut to the bank's soft-loan affiliate leaves a widening funding gap (Dispatches 12/5/25). Some other western shareholders are cutting contributions to the African Development Fund (AfDF) by about \$200m.

Ould Tah says the US cuts are problematic in the short term but 'they also present an opportunity to redefine partnerships' for private-sector investment in Africa. He presents himself as the most likely candidate to secure funding from Islamic banks and Gulf states. That could prove decisive in the election.

The AfDB should also be tapping finance from pension funds across Africa to meet growing development needs, argues Ould Tah. BADEA's non-performing loans fell to less than 0.5% under his leadership compared with over 10% when he took over the bank.

Currently lending about \$10bn annually to its African shareholders, the bank's resources are well short of the continent's development finance needs, reckoned conservatively at over \$100bn a year. Italy is one of a few European states which says it will increase its contributions to the AfDB this year. Prime Minister **Giorgia Meloni** named the AfDB as Italy's main strategic financial partner for its Mattei Plan for Africa.

Maimbo has warned that pressure on the AfDB's financing will be high, as concessional funding is likely to keep declining, with donor countries – particularly in Europe and North America – emphasising private and blended finance. He has also promised to make the bank more agile, noting that 'no one in the private sector wants to wait 18 months for a decision'.

Both he and Ould Tah have promised to prioritise projects that will expand intra-African trade, arguing that the current level, at 15%, is 'grossly inadequate'. 'Until we trade more, everything we produce is either going to rot or be undervalued,' said Maimbo.

Ould Tah has urged the AfDB to take a leading role in making the African Continental Free Trade Area a reality. This includes funding cross-border infrastructure, dismantling non-tariff barriers, and supporting payment

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systems such as the Pan-African Payment and Settlement System.

The bank's \$10bn balance sheet has limited its ability to tackle rising debt and increasing debt service costs, which have put many African treasuries under strain. During the Brookings debate, Ould Tah acknowledged that the bank is not big enough to meet the challenges it faces and will need to partner with peer institutions and other international

organisations.

Adesina hopes that his swan song at the AfDB may be a deal to unblock Zimbabwe's \$21bn debt impasse. At a side event in Abidjan on 26 May, Zimbabwe's finance minister Mthuli Ncube launched his latest roadmap to restructure the country's debts, reporting that he has written to Britain, Germany and Brazil requesting contributions to a \$2.5bn bridging loan.

Britain is relaxing some strictures: it has dropped sanctions on arms exports to President Emmerson Mnangagwa's government, but European Union diplomats are taking a tougher line. Germany's Jobst von Kirchmann, EU Ambassador to Harare, warned the AfDB meeting that government's latest crackdown on civil society organisations breached assurances on governance and could still block the debt negotiations. ●

## ZAMBIA

# HH tries to take Lungu out of the game

**The President is so fearful for his re-election prospects that he is using threats and inducements to persuade his former foe to leave politics**

**A**lthough he beat ex-President Edgar Lungu by a landslide in the 2021 election, President Hakainde Hichilema believes his old enemy is an obstacle to his hopes of re-election in the polls set for August 2026, and he is moving mountains to remove him from the political scene using first threats, and now inducements.

Meanwhile, accusations of authoritarianism against him are growing while he takes hits for his handling of the economy.

Having been barred by the Constitutional Court from running for the presidency again, Lungu is not a direct rival, but Hichilema fears that Lungu's endorsement of an opposition unity candidate could bring his own poll to less than the 50% plus one he needs for outright victory in the first round.

So far, Lungu, who has been receiving treatment for cancer in Johannesburg since January, has rebuffed all approaches.

Bruised by his defeat in 2021, Lungu withdrew from politics. But he returned in October 2023, capitalising on growing public dissatisfaction with his successor and being nominated as a presidential candidate for 2026 just before the court rules against him.

In response, Hichilema deployed all the weapons of the state against Lungu, including stopping his pension, sponsoring a faction of Lungu's party, the Patriotic Front (PF), to seize the leadership of the party from him, arresting members of his family on corruption charges, and preventing him from travelling outside Zambia. (Lungu had to slip past border controls to get into South Africa.)

A supporter of Hichilema's ruling United Party for National Development (UPND) also moved against Lungu by

applying to the Constitutional Court to reverse its June 2021 verdict that had allowed Lungu to run for re-election in the last general election.

Before the hearing of the case in October 2024, Hichilema appointed four new judges to the Constitutional Court and sacked three of those who had previously ruled in Lungu's favour. The court duly ruled that Lungu could no longer stand for the presidency.

Afraid of Lungu's continuing influence with the electorate, the President has switched tactics and offered to drop all the corruption charges against Lungu's family members, reinstate his state pension, pardon PF members in jail, drop active cases and cease arresting senior PF members, while providing safe return for those in exile, according to sources close to State House.

In return, Lungu would have to pledge to leave the political scene definitively and not endorse any other candidate in 2026.

Some seasoned observers of the political scene believe Hichilema is overrating Lungu's importance and failing to take account of the fact that his own record is the biggest obstacle to his re-election, even though his opponents are heavily divided.

In 2021, Lungu won in places where Hichilema was and remains weak, such as in the Eastern Province and the three provinces of Muchinga, Luapula and Northern. And as the only former president still alive, he also has the kind of political clout available to none of the other opposition leaders.

## EX-PRESIDENT POWER

Hichilema is wary of the successful record of presidential endorsements in Zambian elections. In 2006, former

President Fredrick Chiluba endorsed the PF's Michael Sata, who ran incumbent Levy Mwanawasa much closer than expected. After Mwanawasa died in office in 2008, Chiluba got behind Rupiah Banda, who went on to defeat Sata in the presidential poll.

After he left office, Banda endorsed Lungu in both the 2015 presidential by-election that followed Sata's death, and the scheduled general election of 2016, helping him to victory over Hichilema on both occasions. When Banda endorsed no one in 2021, Hichilema finally beat Lungu.

If Lungu gave in to Hichilema's advances it would improve the incumbent's vote in Eastern, Luapula, Northern and Muchinga provinces, where the ruling party is weak (See electoral maps: AC Vol 62 No 17).

But Lungu is obdurate, we hear. He turned down an approach from his former vice-president Inonge Wina, who visited Lungu and tried to persuade him to abandon politics shortly after she was awarded, along with all other former vice-presidents, a monthly stipend by the President.

Then, in early April, Hichilema went on an official visit to try to get President Cyril Ramaphosa to convince Lungu to quit politics, but Ramaphosa snubbed him. Undaunted, Hichilema dispatched one of Lungu's closest allies, **Valden Findlay**, to see Lungu in Johannesburg (AC Vol 60 No 23). Findlay, who has been accused of involvement in multiple crimes but admits no wrongdoing, was assured that prosecutions against him would stop, his bank accounts would be unfrozen, and his farm in Chisamba and other properties would be returned to him by the state if he managed to facilitate the deal. Yet like Wina, he returned empty-handed.

Other reports say that Hichilema sent the Permanent Secretary of the Ministry of Health, Dr **Kennedy Lishimpi**, to ask Lungu's personal physician, Dr **Panganani Njovu**, to intervene. He declined, as did Lungu's son-in-law, **Patrick Mwansa**, and other old allies and colleagues such as his lawyer **Makebi Zulu** and former minister of Mines **Richard Musukwa**.

## FROM DEFENDING LIBERTIES TO TAKING THEM

The path from concerned defender of civic freedoms to illiberal, intolerant president has been a short one for Hichilema as he lashes out at critics for daring to object to his repressive measures while they accuse him of hypocrisy for posing as a stalwart defender of human rights for so long.

During his election campaign, President **Hakainde Hichilema** said the first law he would repeal would be the Cyber Security and the Cyber Crimes Act, which President **Edgar Lungu** had introduced in the run-up to the 2021 election and which Hichilema had condemned as an attack on civil liberties.

But in April this year, he brought in even more repressive versions of the legislation. This attracted worldwide criticism for vague prohibitions which civil society believes will be used to suppress free speech.

The new laws permit the interception and surveillance of all electronic communications including calls, emails, texts, and streamed content.

More general attacks on democracy and human rights have drawn criticism from Amnesty International, Human Rights Watch and the United Nations Special Rapporteur on the Freedom of Expression.

Peaceful protests against Hichilema's presidency are effectively banned and the police block nearly all public meetings called by opposition parties, apart from at by-elections, citing unspecified security concerns or inadequate manpower.

Several of Hichilema's critics have also been arrested on anti-free speech charges such as 'sedition' and 'hate speech'.

The presidency has also proposed constitutional changes even though many changes introduced in 2016 have yet to be tested. Oppositionists say the changes, many of which Lungu wanted to introduce before the 2021 election and which Hichilema successfully blocked, are designed to favour the ruling party.

They include increasing the number of parliamentary seats by up to 92. Although the official reason is that some constituencies are said to be too large, it is widely suspected that the real motive is to increase the number of seats where the UPND is strongest and so entrench its dominance of parliament.

They also hope, oppositionists say, to reach a two-thirds majority in parliament, which would make constitutional changes much easier to implement. ●

Despite the dismal record of the intermediaries to date, we hear that the President hopes to dispatch Chief **Mpezeni** – traditional leader of the Ngoni people of Eastern Province, Lungu's home area – to sell the deal to Lungu.

Sources say Hichilema underestimates Lungu's bitterness at his past treatment by Hichilema. One member of the Hichilema camp told *Africa Confidential*, 'Lungu says he has endured mistreatment over the last four years at the hands of Hichilema and will not accept a deal under any circumstances.'

All of which leaves Hichilema having to defend his record and refute accusations that he is responsible for the parlous state of the economy, regardless of the mess he inherited and public debt that ballooned to US\$13 billion under Lungu.

Living standards are failing to improve under the impact of a \$1.3bn IMF programme tackling public spending and currency issues, and Zambia's defaults on its commercial debt remain unresolved and dominate investor confidence (AC Vol 61 No 19).

Although the country is currently not

servicing its debt, the IMF programme has forced the government to remove subsidies on key social services and suspend new capital investments that can generate jobs. The kwacha is weak, resulting in increased inflation from higher prices for fuel and food, which feed growing urban discontent.

Much of the turmoil in the copper sector is judged to be over, but the expected public economic benefits from the improvements in two of the country's largest employers, Konkola Copper Mine and Mopani Copper Mine, will take more time to work through.

Added to this are growing concerns about corruption. The Financial Intelligence Centre, a statutory body, recently revealed that it has recorded over \$3bn in illicit financial flows in 2024 alone, but Hichilema is yet to act on its report.

On 8 May, the **United States**, which accounts for a third of public health spending in Zambia, announced that it was cutting US\$50 million in aid to the health sector due to 'systematic theft' of donated medical drugs and supplies.

'We are no longer willing to underwrite the personal enrichment of fraudsters or the corrupt when patients go without or have to buy life-saving medications that we have provided for free,' said US ambassador to Zambia **Michael Gonzales**, who added that the decision to cut funding was taken after repeated warnings.

In response, the minister of foreign affairs warned the American to 'refrain from interfering in internal affairs' and only speak through 'formal diplomatic channels'. Gonzales hit back, saying he had held 33 meetings with Hichilema's officials on the matter, which yielded nothing, before going public.

One of Hichilema's biggest electoral pledges was to strike at corruption for which the Lungu regime had become notorious, but after raising hopes so high of new prosecutions, barely any have been actuated (AC Vol 62 No 17). ●

## NIGERIA

# Tinubu wants to borrow \$24 billion ahead of 2027 elections

**After two years of harsh reforms, the government aims to win back support with the country's biggest ever public spending programme**

**A**s President **Bola Ahmed Tinubu** was preparing to mark two years in power on 29 May, his allies in the ruling All Progressives Congress (APC) declared the 73-year-old would have the party's uncontested nomination to

stand for another four-year term in the 2027 national elections. The streets of Lagos and Abuja are already festooned with billboards and banners urging Nigerians to 'Step up, speak out and support Tinubu' in a national 'door-to-

door' campaign for the elections in two years' time.

This follows the success of the APC in disrupting opposition efforts to organise an electoral alliance against Tinubu. Judging by the 2023 election

results in which the top three opposition candidates won a combined 60.34% of the vote against Tinubu's 36.61%, he could be vulnerable to such an alliance. But the APC is taking no chances. By bludgeoning or coopting Tinubu's opponents, it has reshaped the political map with two more state governors defecting to the ruling party this month.

Tinubu's main vulnerability is the economy. Praise by bankers and foreign investors for his bold economic reforms – ending fuel subsidies and floating the naira – rings hollow to many Nigerians struggling through the worst crisis since General Sani Abacha's junta three decades ago (AC Vol 66 No 5).

To address that, Tinubu's officials are slow rolling some of the economic reforms and planning a US\$24 billion state-sponsored spending boost financed mainly by foreign loans. The spending package – on infrastructure, health and agriculture projects – aimed to 'livelihoods of the average Nigerian', Tinubu explained in a letter to the National Assembly on 27 May. Comprising loans of \$21.5bn, €2bn and 15bn yen, the spending package is almost two-thirds the size of this year's federal budget.

Much will depend on how this investment programme, perhaps the biggest in Nigeria's history, is managed ahead of the elections. Without close monitoring and anti-corruption safeguards, it could descend into a mammoth political slush fund.

But the top economic policy team of Finance Minister Wale Edun and Central Bank of Nigeria (CBN) Governor Olayemi Cardoso are jealously guarding their reform record under Tinubu. Aside from managing the \$24bn spending programme, they have adapted their policies to adverse market conditions.

Lower oil prices, driven by depressed global demand, could fall further if the Organisation of the Petroleum Exporting Countries (OPEC) agrees to boost crude oil output in July, undermining the government's ambitious revenue projections. These are already weakened by national oil output falling around 0.4 million barrels per day (b/d) short of the 2.06m b/d target, which underpins Nigeria's 55 trillion naira 2025 budget – even when condensates, which do not count towards Nigeria's 1.5m b/d OPEC quota, are included.

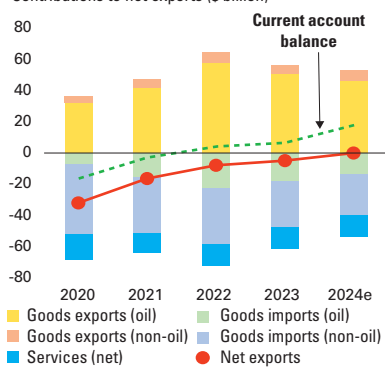
## SECURITY DEFICIT

Tinubu's exploitation of the 17 March attack on the Trans-Niger Pipeline to declare a state of emergency in Rivers State, and suspend Peoples Democratic Party governor Siminalayi Fubara, should not obscure the threat posed by Niger Delta attacks on onshore oil

## NIGERIA: FALLING OIL PRICES TO HIT NATIONAL FINANCES

### EXPORTS VERSUS IMPORTS

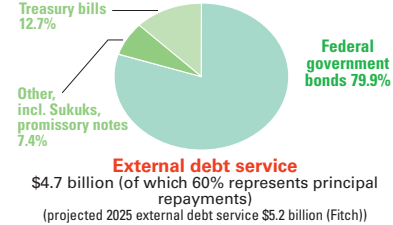
Contributions to net exports (\$ billion)



### TOTAL DOMESTIC AND EXTERNAL DEBT SERVICE

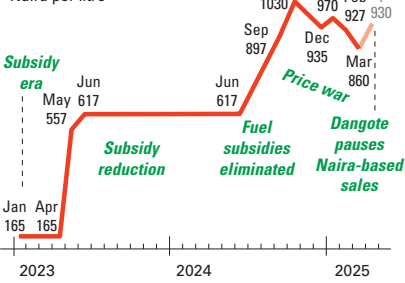
January-December 2024

Naira 5.9 trillion (of which 5% represents principal repayments)



### FUEL PRICES

Naira per litre

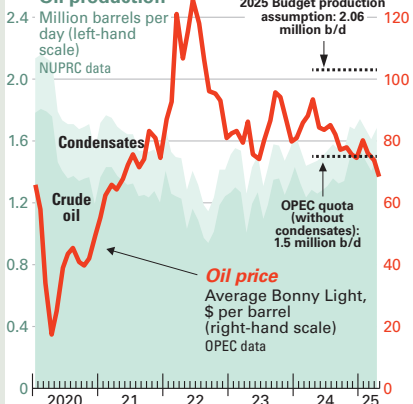


Source: Financial Derivatives Company

Sources: World Bank, Financial Derivatives Company, Debt Management Office, Nigerian Upstream Petroleum Regulatory Commission (NUPRC)

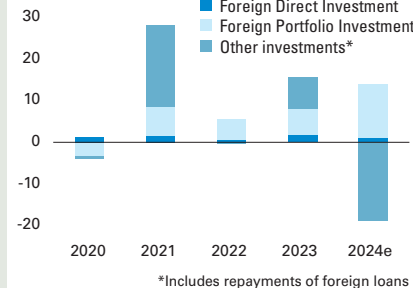
### OIL PRODUCTION AND OIL PRICE

Oil production

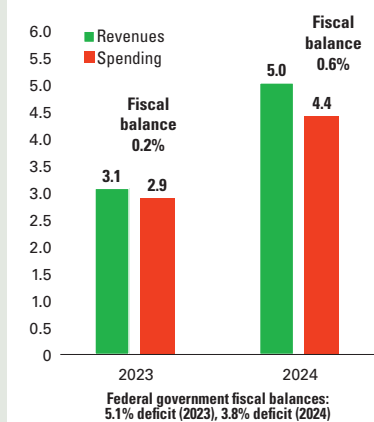


### FDI, PORTFOLIO INVESTMENT & OTHER INVESTMENT INFLOWS

Net, \$ billions



### OVERALL FISCAL BALANCE OF NIGERIA'S 36 STATES\* % of GDP



\*World Bank calculations

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operations – including those acquired from international oil companies by Nigerian investors (Dispatches 24/3/25). Confronting that threat, Tinubu has intensified efforts to coopt former militants such as Government Oweizide Ekpemupolo aka 'Tompolo' with inflated contracts to ensure pipeline security in the Delta.

Far less tractable are the jihadist insurgents which are stepping up attacks in states across the north and the middle belt. The deadliest attacks are organised by affiliates of the Islamic State in West Africa Province, which draws on a regional network of arms smugglers,

military trainers and sophisticated communications equipment.

The capacity of Nigeria's military to respond to these attacks and gather intelligence about the factions has been seriously weakened since the schism opened up between the Tinubu government and Niger after General Abdourahamane Tiani's coup against Mohamed Bazoum in Niamey on 23 July 2023. The lack of security cooperation between the junta-ruled states of Mali, Burkina Faso and Niger and their civilian-ruled counterparts has been adroitly exploited by multiple insurgent groups.



## HOW THE CENTRAL BANK RAN THE REVOLUTION

The Central Bank of Nigeria (CBN), whose Monetary Policy Committee kept the policy interest rate at 27.5% at its 19-20 May meeting, stated in April that Nigeria's US\$6.83 billion 2024 balance of payments surplus – which followed heavy deficits in 2023 and 2022 – is a direct result of key economic reforms, including foreign exchange market liberalisation and unification, disciplined monetary policy and improved coordination between monetary and fiscal policymaking. These reforms, the CBN claims, have pushed foreign exchange reserves beyond \$40bn by the end of 2024. The banks adds that this has been accompanied by improved investor confidence and stronger trade performance.

The CBN's claims, alongside assertions from Tinubu's supporters that investment has increased considerably, remain subject to caveats. Most of the inflows have come from volatile portfolio investment. Longer-term foreign direct investment, the CBN admits, fell by more than 40% last year, to barely above \$1bn. World Bank economists, in the Bank's latest, largely optimistic assessment, warn that long-term foreign investment continues to be held back by structural constraints on business in Nigeria.

The true level of Nigeria's foreign exchange reserves is subject to debate; gross reserves have declined this year. Some of this depletion is due to loan repayments such as the now-completed repayment of \$3.4bn in emergency financing from the IMF – rather than usual suspects such as CBN interventions in the foreign exchange market to support the naira or lower oil prices.

The CBN typically highlights gross reserves figures rather than the much lower net reserves levels cited by critics. But it has drawn attention to a vastly improved net reserves figure – according to its calculations – announcing on 1 April that net reserves reached \$23bn in December, marking a substantial improvement from just under \$4bn in December 2023 and just over \$8bn in December 2022. This boost has been attributed mainly to foreign exchange reforms, a reduction in foreign exchange swap and forward liabilities, and reduced petroleum product imports.

During the second half of 2023, in the early months of Tinubu's presidency, CBN officials downplayed JPMorgan estimates that net reserves had fallen to \$3.7bn, suggesting that third parties circulate figures with questionable intent. But the April statement indicates that the JPMorgan estimate was much closer to reality than previously acknowledged.

Nigeria's balance of payments surplus and its improving trade balance have resulted in the shorter term from the CBN's foreign exchange reforms. Added to this is the start-up of the 650,000 b/d capacity Dangote refinery at Lekki, Lagos State, which has reduced the need to import gasoline and other petroleum products. **South Africa** is now Africa's biggest importer of petroleum products.

The World Bank notes that despite the boost to finances from the removal of fuel subsidies and the elimination of the costly foreign exchange subsidy, the Nigerian National Petroleum Company has so far remitted only part of its savings to the national Federation account, from which the federal government, states and local governments receive their allocations of revenue.

Many of Nigeria's 36 states are concerned about the distributional impact of key tax reform bills, now approved by both the House of Representatives and the Senate (AC Vol 66 No 10). However, World Bank economists estimate that the rise in total Federation revenues, following the foreign exchange and fuel subsidy reforms, has benefited individual states more than the federal government, enabling many states to run a fiscal surplus.

Details of Nigeria's GDP rebasing has not yet been released. First-quarter GDP figures, expected shortly, should confirm that the 4.6% growth target for 2025, which underpins the federal budget, remains out of reach. ●

This, together with the expanding operations of illegal gold miners and kidnapping gangs, exposes the lack of investment in effective security. They also exacerbate economic hardship on the ground, cutting farm production, disrupting food security and worsening food insecurity.

### BORROWING

Falling oil prices and lower-than-projected revenues will heighten the need for borrowing, which remains

costly on both external and domestic markets. In April, ratings agency Fitch upgraded Nigeria's sovereign foreign currency rating by one notch to 'B' but also warned that the deficit will widen this year and next – even if revenue continues to increase.

Rising debt service payments for 2025, estimated by Fitch at \$5.2 billion on external debt alone, along with higher wages and election-related spending, are likely to drive expenditure growth at a faster pace, further widening the gap

between revenue and spending.

Since February's release by the national statistics agency of stronger GDP growth figures for the final quarter of 2024, and the first rebased inflation numbers for January, which cut official consumer price index inflation by several percentage points, the government has pointed to some positive indicators. Yet April's inflation rate of 23.7% is under a percentage point lower than January. It remains one of the highest inflation rates in Africa. ●

## LIBYA

# Dubaiba is set to lose his militia gamble

**The worst fighting in Tripoli for 80 years has sparked protests demanding the prime minister's exit**

**A**nger with the Government of National Unity (GNU) of Prime Minister Abdel Hamid Dubaiba was already on the rise when one of the militia-infested capital's most

powerful chiefs, Abdel Ghani el Kikli (aka Ghneiwa), was shot dead during a meeting with the commander of the GNU's main military force, 444 Brigade, on 12 May.

Ghneiwa headed the Stability Support Apparatus (SSA) militia in the western part of Libya which is mostly controlled by the GNU. The east and most of the south is controlled by the Benghazi-based warlord, General Khalifa Haftar.

The fateful meeting had been convened by 444 Brigade commander Mahmoud Hamza to defuse tensions from a breakdown in relations between Ghneiwa and Dubaiba. Accounts of what happened vary. One says the killing was planned; another that tempers flared when Ghneiwa started hurling insults.

Within just a few hours of Ghneiwa's death, the hitherto seemingly invincible SSA evaporated, its members in flight or hiding at home. There was widespread public relief at Ghneiwa's removal, and the next day Dubaiba's waning credibility seemed to give way to a grudging respect for him as the apparent victor.

But this lasted just a few hours. Late on 13 May and all the next morning, 444 Brigade's guns and those of another GNU force, Brigade 111, turned on the next most powerful militia in the city, the Special Deterrence Force, known as Rada, headed by **Abdul Raouf Kara**. Rada has controlled much of the central and eastern part of the city from its base at Mitiga Airport. This time, however, the pro-government forces did not prevail. Rada fought back, supported by other militias arriving from outside Tripoli.

The clashes were the worst in central Tripoli in over 80 years, worse even than those of the 2011 revolution when the city was taken over quickly, and even than the 2014 'coup' when Misratan forces destroyed the international airport to the south of Tripoli and installed a pro-Misratan, quasi-Islamist and internationally rejected administration (AC Vol 55 No 24).

The violence exceeded that of Haftar's attack in 2019-20, when again the action was in the south-east of the city (AC Vol 60 No 16). This time, buildings in central Tripoli were hit, even destroyed. The number of casualties has not been disclosed, with some sources claiming the GNU ordered hospitals not to reveal the figures, but between 50 and 60 are believed to have been killed, civilians and combatants, and up to 120 wounded.

The SDF attack created a massive backlash against Dubaiba, not just in Tripoli but throughout the whole

government-controlled area, as the public blamed him for the death and destruction by ordering the attack on Rada. Only in his home city of Misrata has he been able to resist the calls for him to go.

By midday on 14 May, the violence subsided and fighters withdrew to their bases under a truce. Two days later, there was a massive anti-government protest in the evening, the biggest Tripoli has seen for years. It was peaceful but there were shootings when a breakaway group of protestors went to Dubaiba's office and started tearing down the outside railings and two were reported killed.

#### PUBLIC MOOD

The atmosphere in the city has been electric as talk of 'people power' and 'a new revolution' spreads. Several GNU ministers and deputy ministers and top officials resigned in the wake of the protests. By the morning on 17 May, the consensus was that the GNU could not survive much longer.

But Dubaiba still refused to go. That evening he went on TV, insisting that all the militias had to be disbanded and that Ghneiwa had been deeply corrupt, but that he had had no idea as to the extent.

The general public views Dubaiba and his family and circle as corrupt and happy to collaborate with the militias, so his remarks were greeted with scepticism. But the protests that have continued have attracted smaller numbers. The capital's eastern suburbs of Suq Al Juma and Tajoura, which back Rada, blocked access roads supposedly to prevent an attack, although it was more a symbolic gesture of defiance.

Dubaiba is trying to divide the opposition. On 18 May he handed back control of the main border crossing with **Tunisia** at Ras Jedir to forces from

the nearby Amazigh-majority town of Zuwara in what was seen as an attempt to buy them off.

Until then the GNU's Law Enforcement Force had been in charge of the crossing, having taken it over from the Zuwarans after they were accused of profiteering on the smuggling of fuel and other goods across the border.

Zuwarans are now back in charge of the crossing after the LEF was sent back to keep order in Tripoli. The return of Ras Jedir to Zuwara control could stir up anti-Amazigh sentiment, especially in non-Amazigh towns in the west such as Zintan, home of GNU interior minister **Emad Trablusi**, whose own militia has tried in the past to take over the crossing.

Tripoli is now in a fractious stalemate. Nobody thinks it can last; neither do they see Dubaiba giving up. The House of Representatives (HoR) in Benghazi plans to take advantage of the chaos in Tripoli by announcing a new prime minister to head a united government. But if the choice is not backed by the High State Council, which seems unlikely given that it is itself currently split into two competing bodies, it will not be legal under the terms on the 2015 Libyan Political Agreement and will be rejected by the international community.

That reality has been confirmed by 26 HoR members from the eastern region who have issued a statement distancing themselves from any unilateral appointment of a new prime minister by the HoR.

This could leave the Supreme Court as the only acceptable body to appoint a new GNU. It has authority, having in 2021 appointed the country's Presidency Council. Alternatively, the chaos in Libya's could escalate with regional consequences again. ●

## SOUTH AFRICA/US

# Why Musk and Rupert hold key to the summit

## Two South African billionaires have cleared the path for a business accord to unfreeze the diplomacy

Until a month ago, the chances of President **Cyril Ramaphosa** getting a constructive meeting with his United States counterpart **Donald Trump** appeared vanishingly small. After a barrage of punitive measures against South Africa since the beginning of the year, Trump's administration welcomed with citizenship rights over 50 Afrikaners claiming they were the victims of genocide. The first batch arrived in

the US on 12 May, prompting reactions ranging from derision to incredulity around the world.

It seemed intended to set up the worst possible dynamics for the Ramaphosa-Trump summit at the White House on 21 May. But the prospect of diplomatic disaster appears to have been averted by none other than an Afrikaner billionaire, **Johann Rupert**, who is being held up as the living refutation of accusations of persecution of his ethnic group.

Rupert has flown to Washington DC to join the Ramaphosa delegation ahead of the 21 May meet. His blunt speaking and relentlessly pro-markets views are said to chime with Trump. It was Rupert who set up the call for Ramaphosa to congratulate Trump after his election victory on 5 November.

Rupert also knows and gets on with his fellow South African billionaire **Elon Musk**, whose commercial grievances have led the Trump administration's

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charge against Ramaphosa's government. At 74, Rupert is closer in age – but not in outlook – to Musk's father, and his age and vast wealth earn extra points with Trump.

Rupert has been at the edge of discussions within the Ramaphosa group on a package offering special market access to Musk's Tesla cars and Starlink satellite internet system. Ramaphosa's strategy is to make the commercial offer convincing enough to break down diplomatic barriers – the most serious of which is the effective boycott by the US of G20 meetings while South Africa chairs the organisation. South Africa is due to pass the G20 baton to the US at the end of this year.

Washington's boycott, and the absence of the world's biggest economy and capital markets, disrupts the more than 130 scheduled G20 meetings due

this year.

Those meetings are organised under a troika system – the last G20 chair (Brazil), the current chair (South Africa), and the next chair (the US) – which is in danger either of breaking down or excluding Washington from multiple decisions. The G20 leaders are due to meet in South Africa for a grand summit, which Trump has said he won't attend unless the country changes its policies.

The Trump-Ramaphosa match will be keenly watched in those 25 African economies which, like South Africa, face much higher US tariffs. African governments are also looking for clues about the future of the African Growth and Opportunity Act (AGOA) which provides duty free access for specific products to the US market for 22 African countries.

Ater China, Britain and the European Union, the US market is a major earner for South Africa, currently held back by sluggish growth, low investment and high structural unemployment.

About 600 US companies with 200 000 employees in South Africa are pinning great hope on the 21 May summit. South Africa's more innovative business leaders have helped Ramaphosa's officials craft a series of trade and investment deals covering natural gas, transport, green energy and agriculture for both trade and investment. South Africa's critical mineral reserves such as platinum (80% of the global total), palladium and manganese also interest Trump and Musk.

Minister of Agriculture John Steenhuisen, also leader of the

Democratic Alliance in the Government of National Unity, is on the delegation. Others include foreign minister Ronald Lamola, Minister in the Presidency Khumbudzo Ntshaveni, Minister of Trade and Industry and Competition Parks Tau and special Ramaphosa's special envoy Mcebisi Jonas.

More combative officials and open critics of Trump such as ANC Secretary-General Fikile Mbalula and Mining Minister Gwede Mantashe were kept out of the delegation to prevent a confrontation, we understand.

In the run-up to the meeting Musk posted on his X platform a video on laws he claimed discriminate against whites which has recorded millions of views.

The latest amendment allowing the South African government to expropriate land in the public interest in tightly prescribed circumstances (as is the case in most jurisdictions) has been passed. But there have been no seizures to date as Agriculture Minister Steenhuisen, also an Afrikaner, points out.

Ramaphosa wholly rejected the discrimination charges on television last week: 'False narratives about genocide are not a reflection of who we are as a nation.'

To buttress the anti-discrimination point and meet Musk's commercial demands, Ramaphosa's delegation is set to offer a workaround which would enable Starlink to operate in South Africa without ceding a third of the equity in its local affiliate to South Africans from 'previously disadvantaged communities' as the current Black Economic Empowerment rules stipulate. ●

## DISPATCHES

EU/AFRICA

## Brussels claims the EU is Africa's 'reliable partner', as officials tout cooperation on UN

27 May

**Kallas wants to work with AU to support beleaguered multilateral bodies**

The European Union may not be putting anything new on the table but it 'is the partner Africa can rely on', the EU High Representative on Foreign Affairs Kaja Kallas told African counterparts at a foreign ministers meeting in Brussels on Wednesday (22 May).

Her remarks proved prescient hours later when United States President Donald Trump ambushed South Africa's Cyril Ramaphosa in the Oval Office.

'The will to do more is strong,' Kallas said after the meeting, adding that both sides were committed to greater collaboration on critical raw materials, Artificial Intelligence and mobility. The EU also wants to encourage more African countries to follow the lead of South Africa and agree Clean Trade and Investment Partnerships – where the EU offers funding for green hydrogen and other clean energy technologies in exchange for access to supplies (AC Vol 66 Nos 9 & 6).

The joint EU-African Union ministerial meeting was billed as a stock-taking exercise by EU officials. Ahead of the meeting, they briefed that new policy announcements were not

expected and that talks would focus on preparation for an EU-AU summit later this year. A date has still not been set for the summit, which officials say will be held in Africa.

A note of interest came from Kallas's remarks both during the roundtable discussion and afterwards to the press that the two blocs need to work together to support multilateral institutions such as the International Monetary Fund, World Bank and United Nations, with the latter facing particularly strong financial headwinds.

'We represent 40% of the world's votes in the UN,' she said.

Though the European Commission says that it supports the aims of UN Secretary-General António Guterres to reform the UN, officials are aware of African concerns about the mandate of the Task Force led by Under-Secretary-General Guy Ryder. It has recommended



a 20% cut to the UN's headcount as well as the merging of a cluster of agencies into four organisations: Peace and Security, Humanitarian Affairs, Sustainable Development and Human Rights.

KENYA/TANZANIA

## Hassan intensifies crackdown with torture of Kenyan and Ugandan activists

27 May

**Boniface Mwangi was held for four days before being dumped at the border**

The detention and torture of **Boniface Mwangi**, one of Kenya's most prominent civil society activists, is the latest move by President **Samia Suluhu Hassan's** increasingly authoritarian government. Hassan said she wouldn't tolerate outsiders 'meddling' in Tanzania's politics and trying to cause 'chaos'. Mwangi says that he was held for four days in Tanzania where he was hoping to attend the trial of **Tundu Lissu**, leader of the opposition **Chadema** party who faces sedition charges. He was beaten and dumped at a post on the Kenya-Tanzanian border before finding help and returning to Nairobi.

On his return to Nairobi's **Kenyatta** airport in a wheelchair, Mwangi expressed concern about the fate of **Agather Atuhairu**, a Ugandan activist who had been detained with him. Hours later, Atuhairu was found badly beaten and is accusing Tanzanian security officials of torturing and sexual violence. This has prompted the **United States** government to demand a comprehensive investigation if these incidents.

Mwangi's treatment came just days after **People's Liberation Party** leader **Martha Karua** was arrested in Tanzania on 18 May, along with **Gloria Kimani** and **Lynn Ngugi** of the **Law Society of Kenya** and deported the following day (AC Vol 66 No 9). They were also planning to attend Lissu's trial.

A photojournalist turned activist who has campaigned against corruption and state violence at home, Mwangi has made plenty of enemies in Kenya's political class, including President **William Ruto**, who filed a defamation lawsuit against Mwangi after being accused of murdering **Jacob Juma**. He also stood unsuccessfully in the 2017 general election in Nairobi's **Starere**

constituency, running on an anti-corruption ticket.

Mwangi was also a key figure in last year's **Generation Z** movement against the **Ruto** government's Finance Bill (AC Vol 65 No 14). In October, Mwangi was abducted outside his **Machakos** home and detained in prison overnight before being released without charge.

MAURITIUS/UK

## Starmer puts legal spin on Chagos Islands deal

27 May

**Prime Minister Ramgoolam claims it completes the 'decolonisation process'**

United Kingdom Prime Minister **Keir Starmer** is taking heat at home over his government's £3.4 billion deal with Mauritius that will allow Britain to retain control of the US-UK air base on **Diego Garcia**, the largest island of the **Chagos Island** archipelago in the Indian Ocean, under a 99-year lease (Dispatches 12/11/24).

Though the agreement is supported by Mauritius and the **United States** government, the decision to cede to Mauritius the sovereignty of the **Chagos Islands** has been criticised by the opposition **Conservative Party** over the costs involved and claims that it could encourage **China** to deepen its diplomatic ties with Mauritius. That is despite the fact that the previous **Conservative** government had negotiated for several years with Mauritius on the islands after a 2019 International Court of Justice opinion in favour of Mauritian sovereignty (AC Vol 63 No 18).

UK officials insist that a series of rulings by the United Nations stating Mauritius' sovereignty over the islands had forced their hand. **Starmer's** Defence Secretary **John Healey** told the House of Commons that 'without this deal, within weeks, we could face losing legal rulings and within just a few years the base would become inoperable'.

Negotiations on the lease have been fraught, with a final delay after the UK High Court granted an interim injunction, which was later lifted, to **Bertrice Pompe**, a British national who was born in **Diego Garcia** and criticised the deal for excluding **Chagossians**, several thousand of whom were forcibly removed from the islands in the 1960s.

'With this agreement, we are completing the total process of decolonisation,' Mauritian Prime

Minister **Navin Ramgoolam** said in a televised broadcast on 22 May.

GUINEA

## Questions abound as prime minister Bah promises junta will hold elections this year

19 May

**After long delays in voter registration and organising logistics, few believe the vote could be credible**

Widespread scepticism greeted Prime Minister **Amadou Oury Bah's** announcement at the **Africa CEO Forum** in **Abidjan** on 12 May that three years of military dictatorship will come to an end in December when **Guinea** holds presidential and legislative elections.

It was made as part of a presentation to boost investment in **Guinea** and to celebrate the start of production at the **Simandou** iron-ore mine, the biggest in the world. It seems that **Bah** wanted to distinguish **Guinea** from the junta-ruled states in **Mali**, **Burkina Faso** and **Niger** where the ruling soldiers have banned civilian politicians and awarded themselves another five years in power. General **Mamady Doumbouya's** junta has been in power since ousting President **Alpha Condé** in December 2021. A year earlier, Condé had changed the constitution to allow himself to contest a third term.

The junta has been positioning itself for an election for months. In particular, the decision in March to release and pardon former junta leader **Moussa Dadis Camara**, who participated in a coup in December 2008, looked like an attempt to curry favour in **Guinée Forestière**, **Camara's** home province, where he remains popular, and which is home to 18-20% of the electorate (AC Vol 66 No 8).

Most of the opposition to **Doumbouya** is under heavy pressure. Political parties are still suspended while the regime has jailed and kidnapped opposition leaders and civil society activists.

The credibility of both the elections and a referendum to adopt a new constitution on 21 September are likely to be undermined by the lack of an accurate electoral register. Last November, the junta launched *Réenseignement administratif à vocation d'état civil* (RAVEC), a registration drive. Progress has been extremely slow and insiders warn that September is too

soon for any credible electoral roll to be ready.

## ANGOLA

# De Sousa defends US\$1 billion J.P. Morgan loan

19 May

## Finance Ministry to approach IMF for funds as debt matures

The average yield on Angola's dollar bonds has soared above 13.5% in recent weeks, prompting Finance Minister Vera Daves de Sousa to shelve plans to test the Eurobond market. Instead, she is opening talks with the IMF on a loan to explore 'financial options' with \$864m due on a bond set to mature in November (AC Vol 66 No 9).

These latest moves reflect the growing financial pressure on Angola's economy amid falling prices for its oil and gas exports but higher servicing costs for its debt stock.

With a new Eurobond out of the question under current market conditions, De Sousa has been trying some innovative financing techniques as a stop gap before the IMF negotiations start.

The Treasury in Luanda says that a US\$1 billion loan it secured from J.P. Morgan, which was the subject of a \$200 million margin call during a market sell-off caused by United States tariffs, cost

just below 9%, significantly less than what the country would have paid for conventional debt.

The loan, which is known as a Total Return Swap, was paid in two tranches of \$600m and \$400m last December but has only just been disclosed by the finance minister.

## EU/AU

# Brussels puts migration ahead of trade and investment deals

19 May

## A shortage of energy and ideas haunts preparations by foreign ministers for this year's bi-continental summit

The mood music out of Brussels suggests that relations with Africa are not getting priority at the European Commission despite rhetorical assurances to the contrary. That is reflected in the lack of fresh thinking ahead of meeting between African and European foreign ministers in Brussels this week. Officials in the Commission are alarmed by the sudden pull back of United States funding for UN and other multilateral agencies and are set to raise the matter with their African counterparts.

The Commission has said that part of its response to the US administration's tariffs will be to 'diversify' its

commercial relations.

It has set a December deadline for concluding talks on a trade deal with India. It has opened discussions on pacts with the United Arab Emirates, other Gulf States and Thailand but to date it hasn't opened fresh talks with any African economies (AC Vol 66 No 9).

Officials say that the 21 May meeting of EU and African Union foreign ministers in Brussels will be used primarily to take stock and prepare for the EU-AU leaders' summit later this year in Africa. Up for discussion will be policies on peace, security and governance; multilateralism; prosperity; and people, migration and mobility, according to an agenda published by the European Council.

The foreign ministers' gathering will be co-chaired by EU foreign affairs chief Kaja Kallas, and Angola's external relations minister, Tete António, who also chairs the AU Executive Council.

On migration, Tunisia, Morocco and Egypt have been designated as 'safe' third countries by the EU Commission, a new listing that is designed to make it easier for the EU to deport migrants whose applications have been rejected. The three North African states are the main recipients of EU funding for migration control.

Officials are also set to discuss the proposed reforms of the United Nations as part of the talks on multilateralism. EU Commission officials say that the bloc supports the restructuring proposed by Secretary-General António Guterres but warn that the UN faces an unprecedented funding crisis. ●

## POINTERS

## South Sudan

SALVA'S MAN TO OVERTURN US VISA BAN

■ South Sudan's President **Salva Kiir Mayardit** is the latest African leader to enlist a Republican-linked lobbying firm on K-Street, hiring Scribe Strategies & Advisors on a six-month, \$500,000 contract.

Led by veteran Republican operative **Joseph Szlavik**, Scribe is among Washington's most prominent Africa-focused firms, having represented over a dozen African political leaders and governments in the past decade (AC Vol 64 No 11).

In April, US Secretary of State **Marco Rubio** revoked the visas of all South Sudanese passport-holders in the US with immediate effect, accusing Juba of 'taking advantage of the United States' by failing to comply with US repatriation efforts for rejected asylum and migration applicants.

Szlavik told *Africa Confidential* that Juba risks the prospect of President **Donald Trump** closing the US embassy and ending all economic support unless it undergoes a radical policy shift. In response, South Sudan has quickly agreed to repatriate over 20 nationals, including several facing serious criminal charges, and has volunteered to host a group of around eight people that the US has deported to **Djibouti**. They are expected to arrive in South Sudan in the coming days.

Szlavik has previously represented **Riek Machar**, South Sudan's First Vice-President, who has been under house arrest at Kiir's behest since 27 March.

He is also expected to advocate for **Benjamin Bol Mel**, a close ally of Kiir, who was recently appointed one of South Sudan's vice-presidents. Bol Mel, widely believed to manage Kiir's business interests, is seen as a potential successor (AC Vol 66 No 9) to the president. He was sanctioned with a travel ban and asset freeze during Trump's first administration (AC Vol 66 No 8).

## Kenya

IMPEACHED BUT UNBOWED

■ The launch of **Rigathi Gachagua's** Democracy for the Citizens Party (DCP) marks the latest challenge to President **William Ruto's** standing in central Kenya, a region where he claimed 75% of the vote, helping secure his victory in August 2022.

The DCP will officially launch on 3 June with a day-long rally at the Kasarani Indoor Arena in Nairobi,

## TANZANIA – PRESIDENT HASSAN TURNS BULLDOZER

President **Samia Suluhu Hassan's** tenure, once praised for its democratic reforms, has taken a sharp authoritarian turn. After initially reversing some of the repressive policies of her predecessor, **John Magufuli**, Samia is now presiding over a renewed crackdown on opposition and activists.

Her stance was made brutally clear when **Kenyan** and **Ugandan** activists, attempting to attend the trial of opposition Chadema leader **Tundu Lissu** – who faces sedition charges – were arrested, tortured, and deported (AC Vol 66 No 3 & 9). Among those detained were Kenyan activist **Boniface Mwangi**, Ugandan lawyer **Agather Atuhairi**, and senior Kenyan political figures including **Martha Karua** and former Chief Justice **Willy Mutunga**. Samia remained unapologetic. 'Let them not come here to meddle. Let's not give them a chance. They have already created chaos in their own country,' she declared on 19 May.

After assuming the presidency from the autocratic Magufuli – known as 'the bulldozer' – following his death from Covid-19 in 2021, Samia gradually dismantled some of the more repressive measures imposed by his government. She also 'proudly championed the 'Four R's' of reconciliation, resilience, reform and rebuilding'. That earned praise from a series of western leaders, including then **United States** Vice-President **Kamala Harris**, who described Samia as a 'champion of democracy'.

Magufuli's ban on political rallies was lifted, some media freedoms were restored, and **Freeman Mbowe**, then Chadema's leader, was freed from prison after eight months in custody on terrorism charges.

There were early warning signs. Although she participated in national dialogue sessions with opposition leaders, Samia never committed to the constitutional and electoral reforms that they demanded.

However, over the last 18 months, the crackdown has intensified. Activists from Chadema and ACT Wazalendo, the two main opposition parties, have reported increasing harassment and intimidation. Last year, the Tanganyika Law Society estimated that 83 people had disappeared – cases widely believed to be linked to the police (AC Vol 66 No 1).

Last November's local elections were then blatantly rigged, with almost all opposition candidates denied the right to stand (Dispatches 14/1/25). In response, Lissu, elected as Chadema's leader in January, rallied his party activists to boycott October's general elections, citing the government's failure to guarantee a fair contest. By April, Chadema was banned from fielding candidates after the electoral commission claimed the party had failed to sign a code of conduct.

Since taking office, questions have persisted about the extent of Samia's control over the ruling Chama Cha Mapinduzi. She became Magufuli's vice-president in 2015 without a significant party base, following stints as trade and tourism minister and as a minister in the vice-president's office. This, coupled with her status as a Muslim woman from Zanzibar, has made her nervous about her prospects for winning the election outright, say insiders, leading to alliances with factions allied to Magufuli and his predecessor, **Jakaya Kikwete**.

For now, international criticism of Samia's authoritarian turn remains muted. A European Parliament resolution, which carries no legal weight, condemned Lissu's arrest but the European Commission has neither censured Samia nor reduced its economic support for Arusha. The politics of the bulldozer have returned. ●

which the party's Secretary-General **Hezron Obaga** says will be attended by at least 5,000 people. The party's slogan '*Skiza Wakenya*' (Listen to Kenyans), is intended to highlight Ruto's unpopularity, particularly among young voters. Gachagua says that the party is targeting 152 seats in the 2027 general elections.

Gachagua has not withdrawn from politics following his impeachment as Vice-President last October (AC Vol 65 No 21). Instead, he has campaigned relentlessly against Ruto, claiming to have faced multiple threats to his life. Since he was impeached rather than resigning, Gachagua is barred from

contesting the 2027 elections.

Last week, Gachagua's legal team withdrew four Supreme Court petitions challenging his impeachment, although seven similar cases remain. His inner circle includes **Cleophas Malala**, who was ousted as Secretary-General of the United Democratic Alliance last August, and is now interim Deputy Party leader. Malala, a former Kakamega Senator, is a Luhya from western province. Also joining his team is Agriculture Cabinet Secretary **Mithika Linturi**, who was in Ruto's government until the cabinet was dismissed last July. He has been appointed as National Organising Secretary.