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BLUE LINES

The inauguration of the Grand Ethiopian Renaissance Dam, Africa's largest hydro-electric dam, is a moment of truth for Ethiopia's national identity. Expected to generate 6,000MW of electricity when it reaches full capacity, it also threatens to overhaul the political dynamics of the region, with Ethiopia and its Prime Minister Abiy Ahmed the big winners.

Abiy claims the GERD is of existential importance to Ethiopia, and that it 'means the end of Ethiopia's geopolitical insignificance.' There are eerie parallels with Egyptian leader Gamel Nasser's insistence on building the Aswan in the teeth of opposition from regional and western states. And now Egypt, along with Sudan, is the leading opponent of Abiy's dam, arguing it disrupts water from the Nile River. Egypt, which supported the TPLF in its war with Abiy's federal government, has also offered backing to Somalia, another rival to Ethiopia.

For many, GERD is key project to power. At the Africa Climate Summit in Addis Ababa on 8-10 September, the EU announced that it will pay $156m into a grid-expansion project that would allow Ethiopia to export electricity to its neighbours, including Somalia, Uganda and Kenya, whose President William Ruto has already offered to buy power generated by the dam. Ruto and Somalia's President Hassan Sheikh Mohamud attended the dam inauguration in person; the latter as a conciliatory gesture.

AFRICA-JAPAN

Tokyo scores on policy but loses on scale

Summit pledges on cutting the cost of capital, boosting fair trade and investment were popular, but delegates want quantity as well as quality

One of Prime Minister **Shigeru Ishiba's** last diplomatic forays before his resignation on 7 September was his hosting of the Tokyo International Conference on African Development (TICAD 9) in Yokohama from 20-22 August. In Ishiba's own lights, the TICAD summit could be marked as a success, against a harsh geopolitical backdrop, with 33 African heads of government or state participating and senior representatives from 49 states attending.

Like much of Ishiba's year-long stint in office, his government's shepherding of TICAD 9 was well conceived and sent positive messages – not least that Japan would be the only G7 economy to maintain its current level of Official Development Assistance and would push for an expansion of multilateral development banks and other international financial institutions. Such commitments won quick plaudits from the African delegates in Yokohama.

In Japan's diplomatic plans, much as in its national economic strategy, a combination of tariff wars, geopolitical tensions and a sluggish global economy constrained its ambitions.

On taking up the premiership last year, Ishiba had promised to restore people's smiles, but he was also renowned for his commitment to fiscal discipline. That applied as much to international commitments as it did to his opposition to tax cuts and higher spending. Foreign ministry officials underlined their country's commitment to maintaining ODA levels but said there was no possibility of Japan substituting for aid funding from the **United States** or European Union economies.

Ishiba opened TICAD 9 with a stirring call for a new era of international cooperation, citing his own travels in Africa and technology exchanges. One of these involved Japan's Nagasaki Prefecture using drone technology developed in **Rwanda** to deliver vital medicaments to the remote Goto Islands.

STARTING UP

The 'Japan Africa Co-Creation for Industry' was launched at TICAD to assist African start-ups to work with Japanese companies to develop new industries to serve Africa's youthful and fast-growing markets. Those are two qualities that contrast with Japan's declining birthrate and population.

Delegates applauded the concept and the structure of the partnership which brought in the African Development Bank (AfDB). Their disappointment was with its scale: it had a ceiling of US$5.5 billion for infrastructure and logistics projects. 'That won't go far in a continent of 1.4bn,' a **Cameroonian** delegate told *Africa Confidential*. The same could be said for Tokyo's Human Resource Development programme for 300,000 people, of whom 30,000 will be trained in Artificial Intelligence development.

The TICAD headlines – the shift from ODA pledges to de-risked capital and identified projects processing natural resources, especially critical minerals – point to the organisers' close collaboration with the AfDB in Abidjan and the UN

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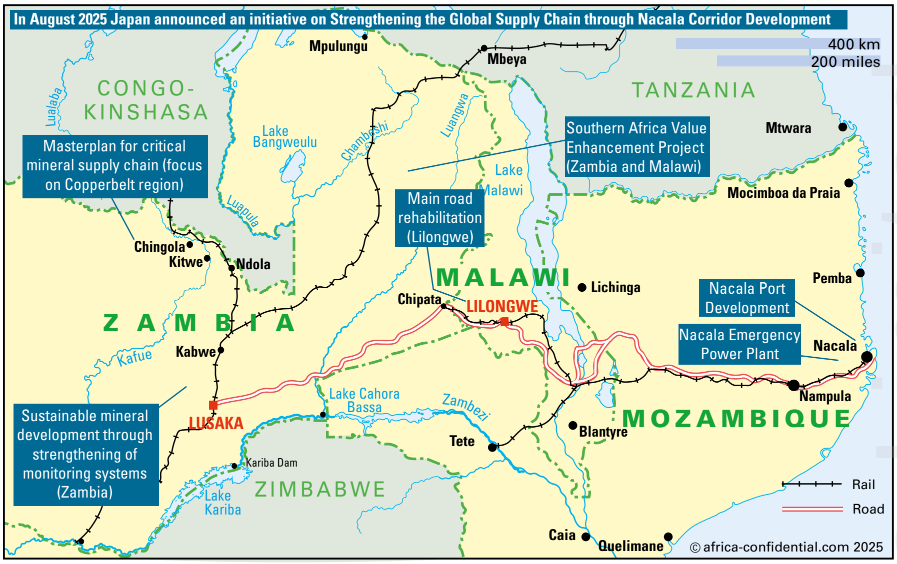
Development Programme in New York. What was missing from the discussions was a strategy to accommodate what is likely to be a more than 25% cut in UN funding in the budget plans to be debated at the UN General Assembly which opens in New York on 22 September.

At the heart of the Yokohama Declaration launched at TICAD was a turbo-charged multilateralism: a crowd-pleasing list of imperatives ranging from an African credit rating agency which it hoped would cut the cost of capital to trade-led industrialisation via the African Continental Free Trade Area and the piloting of special economic zones for electronics, automotive and green tech.

THE NACALA CORRIDOR: From the Indian Ocean to the Copperbelt

Nacala Port (Mozambique) – Lilongwe (Malawi) – Lusaka (Zambia)



With the declaration's reaffirmation of 'rules-based multilateralism' and comprehensive UN Security Council reform with full African representation, there was a sense of time-warp. Japan as the last defender of the rules-based order standing.

But Tokyo, facing a resurgent Beijing across the East China Sea, is as aware of the new world order as any European power. But it appears much more committed to upholding the international system, for sound national security reasons as much as higher-level commitments to cooperation.

A senior foreign ministry official at TICAD spelt out Tokyo's mission to push for UN Security Council reform, getting full representation for **India** and African UN member states, as well as an enhanced role for Japan and other Asian states. 'All UN member states should be involved in these negotiations,' added the official and they should '...address historical injustices and ensure a more representative voice for African states.'

AN EYE TO CHINA

In the context of heightened geopolitical competition, Japan's Africa policy is more than ever viewed through a **China** prism. 'Japan seeks a stable, cooperative relationship with China while addressing serious security concerns, especially regarding the Senkaku Islands.' With a stance that would be familiar to some African foreign ministers, Tokyo underlines the importance of its economic relations with China but emphasises its ties to the US as a reliable security ally.

Tokyo-Washington ties were weaker under Ishiba than they had been under his predecessor **Shinzo Abe**, who as a golf-playing conservative and nationalist proved more adept at courting President **Donald Trump**. It was also the inconsistency of US diplomacy in Trump's first term that prompted Abe to rethink Tokyo's regional alliances before he left power in 2020 (**AC Vol 55 No 3**).

HOW JICA GETS OUT THE AID MESSAGE

Alone among the G7 economies, Tokyo is maintaining its level of Official Development Assistance under the aegis of the Japan International Cooperation Agency (JICA), which has been the locomotive of the TICAD Summits since they started in 1993.

Tokyo's model, which relies strongly on multi-state partnerships and cooperation with multilateral development banks, is part of its wider diplomatic strategy, giving it more weight within the UN system and the Bretton Woods institutions.

JICA is a mark one international development organisation with its commitment to multilateralism being of a kind that other industrialised economies have abandoned and now favour more nationalistic and unilateral approaches. It operates independently from Japanese embassies in many countries in the way that the *Agence Française de Développement* and **Britain's** Department for International Development used to. JICA has considerable autonomy on policy but its head doesn't have a cabinet seat and so has to report to the ministry of foreign affairs.

Its operations follow IMF guidelines on debt sustainability and it avoids making non-concessional loans to economies in debt distress. It will lead Tokyo's negotiations for reforming procedures for debt workouts at the UN General Assembly and at the IMF and World Bank annual meetings in October.

As Japanese governments have shifted the emphasis from ODA to trade and commercial investment, JICA has widened its focus to bring in more business organisations into its orbit, especially at the TICAD summits which include major exhibitions with African and Japanese companies participating.

On a smaller scale compared with Europe, populist parties such as *Sanseito* (proclaiming a 'Japan First' policy) are gaining ground. Foreign aid is an obvious target for them. So, the government in Tokyo has been mobilising opinion to support ODA, framing it as an investment in the future that could help address Japan's demographic challenges.

Part of JICA's strategy here is to promote 'brain circulation': the two-way circulation of knowledge and human resources that can benefit both Japan and African economies. To publicise such ideas, JICA invited academics, community activists and businesspeople to TICAD to help develop these partnerships. ●

That has morphed into the Free Open Indo-Pacific (FOIP) strategy which prioritises connectivity – originally between Japan and India but now crossing the Indian Ocean to link with East Africa – and wants to build two-way supply chains, focusing on critical mineral as well as processing and storage technology.

Tokyo's backing for the 'Economic Region Initiative of the Indian Ocean-Africa' is part of this wider plan and is premised on greater regional integration and industrialisation.

These regional and intercontinental strategies are Tokyo's counterpart to China's Belt and Road Initiative (BRI). But they are avowedly multilateral in their leadership, bringing Tokyo and Delhi together initially – as opposed the Beijing-centricity of the BRI.

For African states, the most obvious difference is scale. At TICAD 8 in 2022, Tokyo pledged $30bn in investment by 2025 but Japanese firms have failed to live up to those targets, even when encouraged by state guarantee schemes (**Dispatches 30/8/22**).

The partnership between Japanese and Indian firms – both on the Indian sub-continent and in Africa – is meant to boost the financial firepower of the strategy.

Japan is a leader in pulling together investment partnerships; for example, the Sumitomo-NamPower sustainable ammonia project. But Japan's Foreign Direct Investment in and trade with Africa has under-shooting official targets for a decade. Part of the problem is the extreme risk aversion of Japanese corporate and their thin knowledge base on African economies. More diplomacy is needed if this is to change: to date Tokyo has signed six bilateral investment treaties with African states. That will need quadrupling if Japanese firms are going to take on their corporate rivals in Africa.

The comparison with China is instructive: Japan has disbursed $8.5bn for 80 infrastructure projects in Africa since 1993 but Chinese financial institutions have disbursed over $180bn of loans in Africa since 2000, according to the Global Development Policy Center at Boston University.

But beyond the stark monetary comparisons, Japan is pioneering new initiatives of building sustainable supply chains to secure cobalt, lithium, nickel and rare earths to give African producers a chance to diversify from the dominant Chinese-owned refiners (AAC Vol 6 No 9).

Announcing a move from mega-loans from policy banks to smaller, lower risk projects, Beijing had seemed to be downsizing its development ties with Africa as concerns rose about debt levels and stalling economic growth in the aftermath of the Covid pandemic. Yet at last year's Forum for China Africa Cooperation (FOCAC), Beijing made financial pledges of over $50bn blending state-backed loans, quasi-commercial deals and market-led investments.

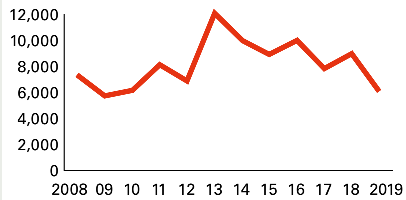
TICAD 9, the flagship for Tokyo's Africa policy with its multilateral finance offer, green growth and large-scale training pledges, maintains its unique pattern of partnerships: bilateral and trilateral ties with India, **France**, and the European Union which help to share the risk and begin to address the shortfalls on scale. ●

AFRICA-JAPAN RELATIONS: Focus shifts to investment, start-ups and blended finance

JAPAN'S BILATERAL ODA IN AFRICA (2022) US$ millions

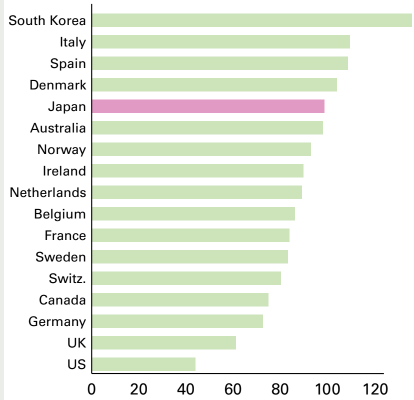
	Grants	Govt loans etc	Disbursement total Net	Disbursement total Gross
Egypt	24.68	270.54	295.22	455.29
Kenya	62.58	123.13	185.72	244.03
Côte d'Ivoire	41.18	99.77	140.94	140.94
Morocco	4.87	51.92	56.79	128.24
Mozambique	53.07	51.17	104.24	106.51
Senegal	42.76	49.25	92.00	92.24
Madagascar	32.20	49.65	81.85	81.85
Tunisia	12.02	3.53	15.54	68.64
Rwanda	48.68	18.80	67.48	67.48
Ghana	61.66	0.31	61.97	61.97
Ethiopia	55.31	1.89	57.20	57.20
Uganda	20.24	10.28	30.53	42.78
Tanzania	20.78	2.85	23.63	32.58
Somalia	30.45	-	30.45	30.45
Nigeria	30.05	-4.34	25.71	30.05
Burkina Faso	29.79	-	29.79	29.79
Djibouti	28.31	-	28.31	28.31
Malawi	27.24	-	27.24	27.24
Cameroon	23.88	-0.20	23.68	25.44
Sierra Leone	24.69	-	24.69	24.69
Guinea	24.31	-	24.31	24.31
Congo-K	21.96	-	21.96	21.96
South Sudan	19.55	-	19.55	19.55
Zambia	13.93	3.29	17.21	17.21
Burundi	15.14	-	15.14	15.14
Sudan	13.47	-	13.47	13.47
Chad	13.19	-	13.19	13.19
Niger	12.81	-	12.81	12.81
Mauritania	9.91	-	9.91	9.91
Zimbabwe	8.69	-	8.69	8.69
Mauritius	5.63	0.42	6.05	8.56
Botswana	2.62	1.36	3.98	7.58
CAR	7.08	-	7.08	7.08
Cabo Verde	5.06	-0.91	4.16	6.73
Gambia	6.47	-	6.47	6.47
Liberia	5.98	-	5.98	5.98
Mali	5.61	-	5.61	5.61
Angola	5.47	-	5.47	5.47
Comoros	5.43	-	5.43	5.43
Namibia	5.41	-	5.41	5.41
Togo	5.40	-	5.40	5.40
Libya	3.06	-	3.06	3.06
Algeria	2.12	-0.61	1.51	2.12

JAPANESE INVESTMENT STOCK IN SUB-SAHARAN AFRICA US$ millions

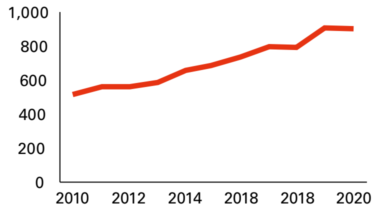


CHANGES IN ODA PROVISION

Changes in 2026 ODA as a percentage of 2023 ODA



NUMBER OF JAPANESE CORPORATE SITES Data from 2022



10 AFRICAN ECONOMIES THAT JAPANESE COMPANIES FOCUS ON

Proportion of companies focusing on country and top reason for that focus

1	Kenya	35.1%	Potential for emergence of and partnerships with startups
2	South Africa	33.0%	African economic, manufacturing, and export centre
3	Nigeria	29.4%	Increasing population and large market
4	Ethiopia	21.3%	High growth rate and large population
5	Ghana	19.5%	Stable politics, economy, and legal system
6	Morocco	19.1%	Foreign capital liberalisation
7	Mozambique	17.4%	Potential for economic growth from LNG and other natural gas resources
8	Côte d'Ivoire	16.3%	Base for tapping West African market
9	Egypt	16.0%	Huge consumer market
10	Tanzania	15.3%	Future growth potential

Sources: Ministry of Foreign Affairs Japan, Ifri and Policy Center for the New South, FInancial Times, Japan Research Institute

Constitutional battles to follow removal of Chief Justice

Published online 11 September

The President's dismissal of Gertrude Torkornoo raises more questions about independent institutions and executive power

The fight over President **John Dramani Mahama's** dismissal of Chief Justice **Gertrude Sackey Torkornoo** on 1 September has prompted calls for constitutional reform across the political spectrum. Concerns are mounting over judicial ethics and independence as well as the lack of checks on presidential authority.

Alongside police, members of parliament, the Electoral Commission and the revenue authority, judges are among the least trusted public officials, according to the Accra-based pollsters Afrobarometer. Civil society leaders argue that the constitution of Ghana's Fourth Republic, introduced in 1992, grants quasi-imperial powers to the President, who appoints hundreds of key state officials – including the heads of the Electoral Commission, Inspector-General of Police, Auditor-General and local government authorities – all without parliamentary or cross-party oversight.

Civic groups, buoyed by the debate over the Chief Justice's removal, are calling for reforms such as capping the number of Supreme Court justices, regulating the Chief Justice's administrative powers and ensuring transparent, fair procedures for judicial promotions and transfers. Critics warn that the removal mechanism for heads of independent bodies is open to abuse, allowing a president or ruling party to initiate and act on petitions with minimal oversight.

All these matters will be on the agenda when the Constitutional Review Committee, chaired by **Henry Kwasi Prempeh**, presents its report to Mahama later this month. Mahama's removal of Torkornoo was the first dismissal of a sitting Chief Justice since 1993.

Torkornoo's legal team says she will challenge the accusations behind her removal, which she insists were unfounded and politically motivated. She also took her case to the Economic Community of West African States (Ecowas) in July and requested a default judgement after Accra failed to respond to her application. Her removal followed an investigation by a five-member committee that assessed petitions submitted in March 2025, alleging misconduct and improper use of office (**AC Vol 66 No 10**).

The Committee – chaired by Supreme Court Justice **Gabriel Pwamang** and comprising fellow justice **Samuel Asiedu**, former Auditor-General **Daniel Domelevo**, Major **Flora Bazwaanura Dalugo** of the Ghana Armed Forces, and University of Ghana Professor **James Sefah Dzisah**, concluded that Torkornoo unlawfully spent public funds on trips with family members to **Tanzania** and the **United States** in 2022.

Describing this as 'avoidable and reckless dissipation of public funds', the panel deemed it 'stated misbehaviour'. Additionally, the committee found that Torkornoo attempted to influence judicial appointments and circumvented established procedures.

The constitutional procedure for removing the Chief Justice requires the President to first determine whether there is a *prima facie* case. On the advice of the Council of State, the President then forms a committee of two Supreme Court justices and three other individuals. This committee investigates and advises the President on whether the Chief Justice should be removed. Its recommendation is binding.

President **Nana Addo Dankwa Akufo-Addo** rejected a similar petition for the Chief Justice's removal on the eve of Mahama's inauguration in January. The petitioner, activist and legal scholar **Stephen Kwaku Asare**, accused the Chief Justice of misconduct and incompetence (**AC Vol 66 No 1**). His complaint centred on Torkornoo's request that the President appoint judges who would then be presented for the Judicial Council's approval.

CRITICISM

Legal professionals are divided over the case. Some regard Torkornoo's dismissal as politically motivated; others – such as former Chief Justice **Sophia Akuffo** – question whether the allegations meet the threshold for removal. Akuffo argued the claims against Torkornoo 'lack the gravity that would justify a severe outcome, such as the removal of the head of an institution of justice'.

International legal bodies, including the Bar Council of England and Wales and the Commonwealth Lawyers Association, had previously criticised Torkornoo's suspension. This prompted Attorney-General **Dominic Ayine** to respond that they had misunderstood both Ghana's constitution and the facts of the case.

Torkornoo's lawyer, **Nii Ayikoi Otoo**, argued that the committee failed to give due weight to the official travel policy submitted in her defence. He insisted that Torkornoo acted within her entitlements in applying for annual leave.

'When these entitlements come, it is not for you to determine anything,' he explained. 'You only indicate whether you want to travel. If you state, for instance, that you intend to take your vacation in Arusha, Tanzania, the officers then process your entitlements and make them available to you.'

In May, a five-member panel of the Supreme Court, chaired by Acting Chief Justice **Paul Baffoe-Bonnie**, unanimously rejected an application by Torkornoo to halt her suspension and removal proceedings. A separate challenge filed by **Vincent Ekow Assafuah**, a New Patriotic Party MP was also dismissed.

Friends of Torkornoo told *Africa Confidential* that some fellow judges were driven by ambition – and, in some cases, male chauvinism – in assessing the merits of her case. One panel member was said to have told a friend that Torkornoo had queue-jumped to get the Chief Justice position.

Others say her manner hasn't helped. 'She comes across as a typical product of Wesley Girls,' said a scion of one of Ghana's political families, '… a bit high and mighty and more polished than thou. Very Lady of the Manor.'

Mahama is taking soundings ahead of next month's Conference of the Ghana Bar Association, where he is meant to be guest of honour. Four days after Mahama removed Torkornoo, Justice **John Eugene Nyante Nadu** of the High Court ordered the National Democratic Congress's (NDC) Greater Accra Chair, **Nii Ashie Moore**, to return property belonging to **Singaporean** businessman **Toh You Kang** – a sign to some that judges hadn't been cowed by the ruling party.

Similar cases of the removal of the heads of independent institutions include the sacking of Commission on Human Rights and Administrative Justice head **Lauretta Lamptey** in 2015 and Electoral

WHO'S NEXT – AND WILL THE CONSTITUTION CHANGE FIRST?

The next political fight will be over whether President **John Dramani Mahama** should use the same mechanism that removed Chief Justice **Gertrude Sackey Torkornoo** to dismiss other heads of independent institutions – or wait for constitutional reform. According to loyalists in the ruling National Democratic Congress (NDC), the likely target is Electoral Commission (EC) Chair **Jean Adukwei Mensa** and her deputies.

Under Mensa's leadership, the EC has faced sustained criticism from the NDC and civil society organisations such as IMANI Centre – particularly over allegations of overspending in past elections and the disenfranchisement of voters in the Santrokofi, Akpafu, Lolobi, and Likpe areas of the Oti Region during the 2020 parliamentary polls.

The race to appoint a Chief Justice to succeed Torkornoo is narrowing between Supreme Court Justices **Emmanuel Yonny Kulendi**, 61, and **Paul Baffoe-Bonnie**, 68, currently serving as acting Chief Justice. Kulendi – a close associate of both Mahama and his predecessor President **Nana Addo Dankwa Akufo-Addo** – began his legal career at Akufo-Addo's firm in Accra and is regarded in legal circles as a reform-minded figure.

Justice **Dennis Dominic Adjei**, 60, recently elevated from the Court of Appeal to the Supreme Court by Mahama, is also a contender. While many view Kulendi as the frontrunner, Baffoe-Bonnie's seniority and extensive experience make him a strong candidate – particularly as Supreme Court justices retire at 70.

If Baffoe-Bonnie is appointed, Kulendi could still succeed him in two years – giving Mahama two chances to shape judicial leadership over the coming term. ●

Commission (EC) Chair **Charlotte Osei** and two of her deputies in 2017 over procurement law violations (**AC Vol 57 No 25**). The mechanism for removing senior judicial officers and heads of independent institutions is widely seen as open to political manipulation.

HISTORY OF MISTRUST

Tensions between the government, the judiciary, and Torkornoo can also be traced back to the 2021 election petition, when the then opposition NDC contested Akufo-Addo's 2020 re-election in the Supreme Court.

Their legal team, led by Tsatsu Tsikata, rejected not only the decision upholding the EC's declaration, but also what they regarded as judicial bias and undue protection of EC Chair **Jean Adukwei Mensa**. At the time, Justice **Kwasi Anin-Yeboah** was Chief Justice.

Subsequent politically charged cases – particularly from Parliament – deepened the mistrust. The NDC lost them all, fuelling claims of bias and earning the Supreme Court the nickname 'Unanimous FC'. Accusations also surfaced that the Chief Justice interfered with panel compositions and abused administrative authority to influence outcomes.

The NDC also criticised the President's unlimited right to appoint Supreme Court justices. At the time, all but one of the 16 Supreme Court Justices had been appointed by Akufo-Addo. Tensions escalated before the 2024 elections, when Mahama declared that his party would no longer contest election results in court, citing a lack of confidence in the judiciary. During the 2024 election campaign, figures associated with the NDC publicly expressed their intentions to remove the Chief Justice if elected. Analysts say this raises concerns that the process – though formally constitutional – was driven by political score-settling.

According to the 2024 Mo Ibrahim Index of African Governance, Ghana scored 100% on judicial autonomy between 2014 and 2017, during Mahama's first term. That score dropped to 50% between 2018 and 2023, reflecting concern over executive interference under Akufo-Addo. ●

NIGERIA

Tinubu moves to rein in the NNPC, slashing funds for north

Published online 9 September

The president's plan would double the central government share of the state oil company's profits to over 80%

As tensions deepen between President **Bola Ahmed Tinubu** and the managing director of the state-owned Nigerian National Petroleum Company (NNPC) **Bashir Bayo Ojulari**, the government plans to claw back some of the company's financial autonomy. Tinubu wants to cut the share of profits that the NNPC retains for running costs and exploration before submitting the remaining revenues to the federal government account. As most of the exploration funds are spent in the northern states, where Tinubu's support is waning, this plan could prove politically explosive (**AC Vol 66 No 17**).

Some in the Tinubu camp think that Ojulari has been too supportive of **Abdullahi Bashir-Haske**, the managing director of AA&R Investment Group and the son-in-law of opposition leader **Atiku Abubakar** (**AC Vol 66 No 15**). Bashir-Haske's companies are leading NNPC contractors in northern Nigeria. But one of Ojulari's strongest cards is that his appointment was proposed by Tinubu's long-time business associate Prince **Dipo Eludoyin**, the chief executive of Paragon Holdings.

The NNPC, which holds the government stake in the country's oil and gas assets, has been the locomotive of the national economy for 50 years. It is also accused of serial mismanagement and corruption. These barbs reached their apogee in September 2013 when former Central Bank Governor **Sanusi Lamido Sanusi**, in a letter to President **Goodluck Jonathan**, accused the NNPC of failing to remit some US$49.8 billion to the Federation from sales over the previous 18 months (**AC Vol 53 No 22**). Jonathan backed his Oil Minister **Diezani Alison-Madueke** who contradicted Sanusi's claims (**AC Vol 64 No 17**). But the saga energised efforts to reform the country's oil and gas sector.

After two decades of negotiations, the National Assembly passed the Petroleum Industry Act (PIA) in 2021, converting the state oil company into a commercialised entity, NNPC Ltd. The federal government's shares in NNPC Ltd are held by the Ministry of

Finance (Minister **Wale Edun**) and the Department of Petroleum Resources (for which the substantive minister is President Tinubu).

Their representatives, **Lydia Shehu Jafiya** and **Aminu Said Ahmed**, have seats on the NNPC Board along with oil industry professionals such as **Austin Avuru** and **David Ige.** We hear that Ige could succeed Ojulari as managing director if the differences with Tinubu escalate.

Under the PIA, the NNPC Ltd should operate like any other commercial company paying taxes, declaring dividends and competing for capital. It must pay its share of fees, royalties and taxes where it holds a stake in leases or licences like other countries in the oil and gas sector.

It is still wholly owned by the federal government but the new structure allows a public listing of NNPC Ltd and sale of its shares on the national capital market. The full privatisation of NNPC Ltd, favoured by Tinubu, would require another vote in the National Assembly.

For now, as a commercial company owned by the government, the NNPC Ltd has a special status. It is excluded from some federal laws such as the Public Procurement Act, the Fiscal Responsibility Act and the Treasury Single Account. This gives it more control over its finances.

The PIA stipulates, after much politicised negotiation, that the NNPC should retain 30% of its profit as running costs while another 30% of its profit should be invested in the exploration of frontier basins, with the remaining 40% of profits remitted to the federation account. But the Tinubu camp say this deprives the government of vital revenue as fiscal pressures mount and that the frontier fund lacks accountability.

An internal memo signed by Nigeria's Attorney-General, **Lateef Fagbemi**, seen by *Africa Confidential*, stated that President Tinubu has approved amendments to the petroleum law. The plan is to cut the share of profits allocated to running costs from 30% to 10%, and reduce the frontier fund from 30% to between 5% and 7%. Under the reforms, the NNPC would also also its sole control of the frontier fund – meaning it would have to remit over 80% of profits to the Federation Account.

The memo was sent to **Taiwo Oyedele**, who chairs the Presidential Committee on Tax Reform and has launched the government's radical tax reforms, coming into effect in January. Now President Tinubu wants Oyedele, a senior executive with KPMG, to focus on reforming the fiscal rules in Nigeria's opaque oil sector (**AC Vol 65 No 25**).

The other key figure on tax reform is **Zak Adedeji**, Executive Chair of the Nigeria Revenue Service (NRS), who oversees the assessment, collection and accounting of federal taxes and other national revenues. So far, Adedeji has focused on driving non-oil revenues and centralising the administration of the service, but his input will be important for the government's plans for tighter controls on NNPC finances.

During the drafting of the petroleum law, southern governors and activists lambasted the proposal for the frontier fund, arguing that the Niger Delta held over 75% of the country's oil and gas reserves and produced the best returns (**AC Vol 66 No 7**). But the frontier fund has mainly financed exploration projects in northern states. These are capital-intensive with security risks, and international oil companies have stayed away. Backed by the government under President **Muhammadu Buhari**, the

OIL TAX CHANGES COULD TRIGGER NEW POLITICAL FIGHT

The main pushback against President **Bola Tinubu's** tax changes is coming from the northern governors, especially those in the north-east whose states are the main beneficiaries of the frontier fund. The six governors in the north-east region, of all parties, met with Tinubu in early September to press for a resumption of oil exploration in their region.

The search for oil in northern Nigeria began over 40 years ago but around 2000, Shell Nigeria Exploration and Production Company abandoned the pursuit after failing to find oil and gas in commercial quantity in Kolmani River I Well. It was revived in 2016 by President **Muhammadu Buhari** who wanted the region to develop oil and gas production to lessen its dependence on revenues from southern states.

In February 2019, on Buhari's order, the NNPC under the leadership of then CEO, **Maikanti Baru**, announced exploration in northern Nigeria with Messrs Etihad Oilfield Services and Drillog Petro-Dynamics Limited as contractors. Within months, Etihad Oilfield owned by **Abdullahi Bashir-Haske**, announced that it had found substantial hydrocarbon deposits in the in the north-east, specifically in Kolmani River II Well on the Upper Benue Trough, Gongola Basin which straddles Bauchi and Gongola states. Bashir-Haske was encouraged by northern moguls like his mentor and influential politician, **Bamanga Tukur**, and **Aminu Dantata**, who died in Abu Dhabi in June.

Bashir-Haske's company was contracted by the NNPC, under its previous managing director **Mele Kyari**, to drill in northern Nigeria. Then in 2021, Bashir-Haske made an unsuccessful bid for a 51% stake in other oil blocks, where **China's** Addax Petroleum was the operator.

This search for oil in the north boosted the popularity of the ruling All Progressives Congress in the 2023 election campaign. Tinubu, the APC's flag bearer, promised to 'focus more investment on frontier oil and gas exploration, particularly in as yet untapped parts of the country'. He also promised that Nigeria would be producing over three million barrels a day (b/d) by 2030 (**AC Vol 66 No 1**).

As his political advisors are obsessed with preparing for the 2027 elections, Tinubu is chary of provoking the northern states which have been hit hardest by worsening insecurity and the cost-of-living crisis triggered by his economic reforms. Yet alongside Tinubu's plans to borrow over US$22 billion to finance ambitious infrastructure projects, he wants to ramp up tax revenues sharply (**AC Vol 66 No 11**).

Zacch Adedeji, Executive Chairman of the Nigeria Revenue Service, and **Taiwo Oyedele**, the former Africa Tax Leader at PricewaterhouseCoopers who chairs the Presidential Committee on Tax Reform, have a target of raising tax revenues to a minimum 18.5% of GDP by 2027.

The tax-GDP ratio was under 10% in 2023, one of the lowest in the world. Tinubu's government raised it to 13.5% in 2024 after its first year in power. But this year it has been hovering around 13%, due to partly to slackening demand caused by the naira devaluation. Getting the NNPC to submit more of its revenues to government would help Oyodele's target but it carries political risks.

Some northern politicians are proposing that the international oil companies commit a share of their profits to frontier exploration while their southern counterparts are lobbying for an amendment of the law to increase the fund that goes to communities where oil assets are domiciled. But there is a pushback by the oil majors against both propositions as they argue that this could prove counter-productive given Nigeria's oil and gas sector has suffered decades of under-investment. Oil companies say that costs in Nigeria are too high, compared with other producers in the region. ●

NNPC led exploration in the northern states, hoping commercial companies would develop the reserves. This hasn't happened.

The NNPC had contracted local companies to explore in northern Nigeria, especially the Kolmani field in Bauchi and Gombe states. But the projects produced few commercial results.

Mele Kyari, the NNPC managing director who was replaced by Ojulari in April, said some US$400m a year was earmarked for such exploration in northern Nigeria. Now Kyari is now being probed by the Economic and Financial Crimes Commission (EFCC) and his bank accounts were frozen in August. ●

SOUTH SUDAN

Salva and Riek risk a return to war

Both sides are breaching the 2018 peace accord but are shielded by oil deals with China and Russia

The latest attempt at a peace deal between factions loyal to the country's rival veteran leaders – an internationally brokered agreement signed in 2018 – is falling apart after its terms have been breached several times by both sides (AC Vol 66 No 7). Six months ago First Vice-President **Riek Machar Teny Dhurgon** was placed under house arrest – along with his wife, interior minister **Angelina Jany Teny** – after fighting in Upper Nile, where Nuer youth from the White Army clashed with river gunboats and helicopter gunships, resulting in the death of Lieutenant-General **David Majur Dak.**

Government officials blamed Machar. Since then, the country has been on the brink of all-out war. Following a 22 August meeting of the UN Security Council, its sanctions committee urged parties to the 2018 Revitalised Agreement for the Resolution of the Conflict in South Sudan to: 'Exercise restraint, uphold the provisions of the permanent ceasefire and subsequent peace agreement; expedite the unification of the command structure of South Sudan's security forces; complete the training and deployment of the Necessary Unified Forces; and condemn all attacks on the assets and personnel of UNMISS [UN Mission in South Sudan], as well as other humanitarian operators in South Sudan.'

'FAILED'

The **United States's** representative, **Dorothy Shea**, was more direct, complaining that, despite significant international efforts to support post-conflict recovery, its leaders had 'failed to demonstrate the political will to meet their commitments' and hadn't renounced violence 'as a tool for political competition'.

She said recent actions 'signalled de facto abandonment of the 2018 peace agreement on which the transitional government is based' and argued that the bloodshed stemmed from leaders unwilling to change a system that keeps them in power (AC Vol 59 No 19).

Juba retains diplomatic cover from permanent council members **China** and **Russia** – both are increasingly involved in South Sudan's petroleum sector. Despite facing sanctions over its invasion of **Ukraine**, Moscow is formalising diplomatic relations and seeking to open an embassy – just as US President **Donald Trump** threatens to close the American mission (AC Vol 66 No 11).

In June, Juba signed a Memorandum of Understanding with Russian state oil firm Rosneft to refine and transport oil locally, reduce reliance on neighbouring infrastructure, and boost revenues. It also signed agreements with the **United Arab Emirates** on oil and banking and an MoU with **Israel** following a visit by Deputy Foreign Minister **Sharren Haskel** – prompting speculation that Juba has agreed to rehouse Palestinians Israel plans to deport from Gaza. Denials have failed to quell public anger.

Uganda continues to provide military support, despite a UN arms embargo (AC Vol 66 No 9). President **Yoweri Museveni's** son and Chief of Defence Forces, General **Muhoozi Kainerugaba**, has provided outspoken support. After deploying troops to Juba in March, he tweeted: 'The Ugandan People's Defence Forces only recognise one president of South Sudan: HE Salva Kiir. Any move against him is a declaration of war against Uganda.'

Muhoozi visited Juba in August to repair relations after clashes along the disputed Central Equatoria border left several South Sudan People's Defence Force troops dead.

Juba is also working to restore its strained relations with Sudan – and the fractured oil pipeline that has slashed foreign earnings. In mid-August, a delegation led by **Malik Agar Eyre** – formerly leader of the Sudan People's Liberation Movement (SPLM) following South Sudan's secession, and now Deputy Chair of Sudan's Transitional Sovereignty Council – visited Juba for talks aimed at strengthening bilateral ties and reviving oil exports via Port Sudan. In this role, Agar effectively serves as Sudan's Vice-President, given his position within the Sovereign Council, which is controlled by the Sudan Armed Forces (SAF).

Both governments are desperate for revenue, and Sudan is concerned that Juba is pursuing an alternative export route via **Ethiopia** and **Djibouti**. The simmering conflict south of the border has also spilled north, with elements of Machar's SPLM-In Opposition (SPLM-IO) faction reportedly sympathetic to the SAF, while President **Salva Kiir Mayardit** has cultivated ties with the UAE – widely seen as a key Rapid Support Forces (RSF) backer – prompting speculation about shifting allegiances.

OPPOSITION PURGE

Now, **Abdel Aziz Adam el Hilu**, leader of the SPLM-North (SPLM-N) in its stronghold in the Nuba Mountains has joined the RSF, as deputy leader of its parallel government, the so-called Presidential Council. In a move reminiscent of the 2013 crisis, Salva has replaced opposition figures with loyalists. He recently removed Western Equatoria Governor **Alfred Futuyo** of the SPLA-in-Opposition (SPLA-IO), replacing him with his own SPLA-in-Government (SPLA-IG) nominee, **James Al-Tayib Jazz Birapai.**

Further August decrees removed SPLM-IO members from both the Transitional National Legislative Assembly and the executive, including: **Deng Deng Akoon** and **Matata Frank Elikana** from the Council of States; Minister of Water Resources **Pal Mai Deng**; Deputy Minister of Finance and Planning **Bech George Anyak**; and former Deputy Speaker **Oyet Nathaniel Pierino**, alongside **Farouk Gatkuoth Kam, Gai Mayen Luke, Regina Joseph Kapa, Reath Muoch Tang** and **Juol Nhomngek Daniel** from the TNLA.

The SPLM-IO claims these dismissals violate the peace agreement, warning that 'these actions threaten peace and could reignite war'. It demands the unconditional release of Machar and other detainees, accusing Salva of ruling by decree – 313 presidential decrees have been issued this year.

Observers are increasingly alarmed

by rising nepotism. Salva recently appointed his daughter, **Adut Salva Kiir**, as Senior Presidential Envoy on Special Programmes – a role previously held by **Benjamin Bol Mel**, now Second Vice-President and Deputy Chair of the SPLM-IG (**AC Vol 66 No 17**). Widely regarded as Salva's chosen successor, Bol Mel has risen rapidly despite international sanctions for alleged money laundering.

Salva has also removed senior liberation war veterans and potential rivals from party leadership. He ousted former Vice-President **James Wani Igga** from his roles as First Deputy Chair and Secretary-General, and replaced Second Deputy Chair **Daniel Awet Akot** and Third Deputy **Kuol Manyang Juuk** with **Mary Apai Ayiga** and **Simon Kun Puoch** – the latter a former governor of Upper Nile State.

This culture of patronage and impunity – which critics say has allowed Salva's family to dominate key revenue streams – has left South Sudan ranked 180th out of 180 countries in Transparency International's 2024 Corruption Perceptions Index. According to Washington-based watchdog, The Sentry, over US$20 billion has been misappropriated.

FREEFALL

With the economy in freefall, the International Monetary Fund projects inflation at 54.8% for 2025. The South Sudanese pound has lost a third of its value against the dollar. Salva has replaced finance minister **Marial Dongrin Ater** with **Athian Diing Athian**, who held the post from 2020 to 2021 – now the eighth finance minister in five years. He also replaced investment minister **Dhieu Mathok Diing** with former trade minister **Joseph Muom Majak**, and removed **Arop Nuoi Arop** as First Undersecretary of Finance, reinstating **Garang Majak Bol**.

Creditors are circling. Legal action is under way to recover undelivered oil shipments, and arbitration continues over transit fees, shutdowns and compensation. Disputes persist over who will take over the 40% stake formerly held by **Malaysian** oil giant Petronas, which exited in August 2024.

Amid the chaos – and major donor cutbacks, especially from the US and **United Kingdom** – famine looms. A cholera outbreak has claimed 1,400 lives. According to the International Rescue Committee, 9.3 million people – 69% of the population – now require humanitarian aid. Yet the 2025 response plan is only 28.3% funded. Attacks on aid organisations continue, with *Médecins Sans Frontières* withdrawing from much of Central Equatoria after a spate of abductions. The UN ranks South Sudan as the second most dangerous country for aid workers, after Gaza and the West Bank. ●

MALAWI

Lazarus Chakwera fights to survive

Soaring prices, broken alliances and corruption reduce the President's chances of winning re-election and favour his 85-year-old predecessor

Malawians go to the polls on 16 September in an election that could make President **Lazarus Chakwera** the third one-term president in the past 11 years (**AC Vol 66 No 12**). All the economic indicators are disastrous, from inflation at 33%, to fuel and food shortages, and the fallout from a failed IMF programme. The picture is topped off with almost unending corruption scandals.

Worsening living conditions are the biggest strike against Chakwera. Former President, 85-year-old **Peter Mutharika** tells voters he is a safe pair of hands who handed Chakwera a relatively stable economy when he lost the election to the ex-pastor in 2020. Former President **Joyce Banda** is also in the race (**AC Vol 64 No 12**, **Vol 65 No 19** & **Dispatches 20/8/24**).

All polls suggest no candidate will reach the required 50% +1 to win outright, making a run-off between Mutharika and Chakwera likely. According to one pollster, Mutharika's running mate – former Elections Chair Judge **Jane Ansah**, whose 2019 results were nullified – is unpopular, with 43% of respondents saying they dislike her.

Crucially, Chakwera can no longer depend on the support of the United Transformation Movement (UTM), which helped him to victory under the Tonse Alliance electoral pact. The UTM was led by the charismatic Vice-President, **Saulos Chilima**, who died in a government plane crash last year (**AC Vol 65 No 19**). The pact also included Banda's People's Party.

Five years on, Chakwera's Malawi Congress Party faces the electorate alone and opinion polls give him only 30% of the vote. The same polls put Mutharika at 41%, UTM's **Dalitso Kabambe** at 6%, **Atupele Muluzi** of the United Democratic Front (UDF) at 3%, and Banda at 2%. The other 12 candidates are not expected to poll more than 0.2%.

The Malawi Electoral Commission (MEC) registered 7.2 million voters – well below the 10m projected to be eligible. An Afrobarometer survey in 2024 found declining public trust in democracy, suggesting turnout may be low.

Chakwera has blamed the DPP and external shocks – Covid-19, Cyclone Freddy in 2023 and the impact of the war in Ukraine on aid – for the cost-of-living crisis. He claims to be removing 'cancerous pimples' from the economy and promises a better second term. And he has failed to explain persistent shortages of sugar, cement and fuel. He has avoided key issues such as fertiliser (imports of which are crucial to farmers), corruption and tribalism, instead offering voters more freebies.

Chakwera's flagship pledge – a 500,000 kwacha (US$286) baby trust fund payable at age 18 – became a national joke, with critics accusing him of being obsessed with women's reproductive organs. He has since dropped the proposal. He then promised large cash handouts: K10m for 10,000 Malawians and K1m for 1m citizens, as part of a direct economic empowerment programme.

As the campaign closes, Chakwera has shifted to price controls. The government halted sugar exports to end domestic queues. Malawians are also struggling to obtain passports, driving licences and national ID cards amid corruption allegations. For cement, Chakwera's running mate – **Vitumbiko Mumba**, also Minister of Trade – told *Africa Confidential* that the government released $1m to importers to buy from **Zambia** and resell locally at K26,000 per bag. But the cement was only briefly available in the capital. Shop owners, fearing unrest, rationed sales to 10 bags per customer, requiring national ID cards. Mumba alleged that most traders support the DPP and are inflating prices.

Fertiliser prices have soared to K170,000 for a 50-kilogram bag from K20,000 under Mutharika. The Ministry of Agriculture has repackaged leftovers from last season's subsidy programme, to be resold at K80,000 – though critics say this is too little, too late.

Chakwera's silence on corruption extends to his weakening of the Anti-Corruption Bureau (ACB), which has lacked a director since **Martha**

Chizuma's contract ended in May 2024 (**AC Vol 65 No 13**). Acting Director **Hillary Chilomba** is accused of targeting political rivals.

Vice-President **Michael Usi** – appointed after Chilima's death – has condemned the government as 'full of thieves'. The ruling party asked him to resign, reduced his police escort, and the ACB summoned him for questioning. Usi went to court to block the investigation but remains defiant, saying: 'Even if they take all the cars and I go by wheelbarrow, I will still say they are thieves.'

On the campaign trail, both Chakwera and Mutharika have steered clear of corruption and nepotism. Several senior DPP figures face charges. Three of Mutharika's four party deputies are in court, and his bodyguard recently lost a case in which the state will seize K5 billion worth of assets – including 21 properties and 84 vehicles.

OLD CAMPAIGNER

Yet Chakwera's poor record in government has buoyed Mutharika, who is showing remarkable stamina on the stump and drawing large crowds even in Malawi Congress Party (MCP) strongholds – a sharp contrast to 2020, when he was booed or pelted with stones. Mutharika is also promising cash: K5bn for each of the 228 constituencies and K100m in loans to youth and women in every parliamentary seat. The DPP is also pledging free primary and secondary education.

His record – including a stable currency, better access to foreign exchange, maize, cheaper fertilisers, and fuel – has brought back some voters, many of whom believe he would outperform Chakwera. Mutharika's resurgence has unsettled other opposition figures. The UDF's Muluzi has urged him to retire, calling him 'too old', while Dalitso Kabambe has echoed the sentiment. Kabambe left the DPP to join UTM after Chilima's death.

While Kabambe inherited Chilima's party, he lacks his predecessor's charisma. Chilima had a loyal urban youth base and secured 20% of the vote in 2019.

While Chilima's loyalists have embraced Kabambe, many now see politics as tainted – especially after the shock of Chilima's death. Wild conspiracy theories about the crash are haunting Chakwera, who has been nicknamed 'Chikangawa' after the forest where the plane went down.

Kabambe, an economist and former Reserve Bank Governor, divides opinion. His K29m salary drew public ire, yet many see him as the best hope to revive an economy where poverty now affects 70.5% of the population. Yet he struggles to gain traction among traditional MCP and DPP bases.

Banda has teamed up with her former deputy **Khumbo Kachali**, citing her economic achievements during her brief tenure. She stabilised the economy within six months but remains widely associated with the 'Cashgate' scandal, making her the least popular of the five main contenders (**AC Vol 62 No 25**).

As in previous elections, food, fertiliser and the economy dominate the agenda. Allegations of vote rigging and defiance by the MEC could trigger post-election disputes.

Opposition parties have called for the resignation of MEC Chair Judge **Annabel Mtalimanja** and CEO **Andrew Mpesi**, citing alleged MCP ties. A DPP court challenge against Mpesi was dismissed. The DPP has tried to replace its MEC Commissioner with an IT expert, but Chakwera has rejected all party nominees to date – setting the stage for legal battles after the vote.

The campaign began with sporadic violence, mostly blamed on ruling party youth, but it has remained largely peaceful. Polling day is a public holiday, and the MEC has until 24 September to announce the presidential results. The outcome will depend on how the votes in the first round redistribute in the probable second round, with the UTM's likely preference for Mutharika expected to tip the contest his way. ●

SOMALIA/UNITED ARAB EMIRATES

Grudges and geopolitics – MBZ's clash with Hassan Sheikh

Published online 10 September

The origins of the chronic enmity between Somalia's president and the UAE leader lie in the Gulf state's hegemonic ambitions, and some personal gripes

The United Arab Emirates has puzzled many observers with its hostility towards the Somali federal President, **Hassan Sheikh Mohamud**, and its active support of his opponents in the capital and in the federal member states in the last two years.

Notwithstanding the high-handedness of UAE President **Mohammed bin Zayed al Nahyan** (MBZ) in treating with nations such as Somalia – such as his ignoring of the UN arms embargo – Hassan Sheikh has invited Abu Dhabi's anger at times.

Some of MBZ's attitude is driven by his adopting a regional rather than country-by-country approach to the Horn of Africa. The dictates of supporting General **Mohamed Hamdan Dagalo 'Hemeti'** and his Rapid Support Forces in the **Sudan** civil war have obliged MBZ to try to establish new supply routes through **Uganda**, **Kenya**, **Chad**, **Central African Republic**, **Libya**, **Ethiopia** and Puntland.

Some of these efforts failed while others were highly effective, leading MBZ to categorise these countries as allies, clients, or potential spoilers. Hassan Sheikh is one of the latter. Some are tempted to attribute MBZ's hostility to ideology, but Hassan Sheikh's erratic behaviour during his first and second presidential terms explains why the hostility is real.

What it is not based on, say regional experts, is Hassan Sheikh's continuing relationship with the Muslim Brotherhood offshoot *Damul Jadiid* (**AC Vol 56 No 15** & **Vol 66 No 14**). Although the group resulted from a split in Somalia's branch of the Muslim Brotherhood (*Al Ikhwan al Muslimun*) – the movement viewed by MBZ as the greatest evil in the Islamic world – it is no longer close to the Salafist *Al Itisaam bil Kitaabi was Sunnah* and has become a club of politicians more interested in accumulating wealth than in ideology.

BERBERA ISSUE

Initially the two leaders clashed over the UAE's ambitious port building plans in the region. In 2015, during Hassan Sheikh's first term as federal president, an agreement for the rehabilitation of Berbera port was under discussion. Initially, Hassan Sheikh was eager to secure a deal and show goodwill towards Somaliland (see box). Over the last decade, the UAE has become the biggest investor in ports across Africa, outstripping **Chinese** companies.

Hassan Sheikh also clashed with Abu Dhabi after his re-election in May 2022. The Somali authorities were

DP WORLD PORT PLANS SPARK REGIONAL RUCTIONS

A decade ago, the UAE and its port and logistics plans under DP World were predominantly commercial without an explicit political agenda. Its biggest clash in the Horn of Africa was its dispute with **Djibouti's** President **Ismaïl Omar Guelleh** over concessioning rights which have triggered a decade-long legal battle in the **British** and **United States** courts (**AC Vol 56 No 19**).

In Somalia, plans for the Berbera corridor had been discussed with other financiers for years and wasn't yet politicised in early 2015. Relations between Somali federal President **Hassan Sheikh Mohamud** and then Somaliland President **Ahmed Mohamud Silanyo** were cordial.

But late in 2015, the mood changed rapidly. Hassan Sheikh became fiercely opposed to concluding negotiations with DP World. Later in 2016, his prime minister, **Omar Abdirashid Ali Sharmarke**, went ahead and signed the deal regardless. But Sharmarke did not send the draft agreement to parliament for ratification because he was convinced Hassan Sheikh would get MPs to reject it. Hassan Sheikh may have turned against the project because being flexible towards Hargeisa no longer worked for him in the upcoming elections or, as some speculated, DP World had not offered enough to Mogadishu politicians in the way of incentives. Others said that UAE President **Mohammed bin Zayed al Nahyan** (MBZ), who was by then in full control in Abu Dhabi, was promoting Sharmarke as his man, or that DP World played Somaliland off against Mogadishu.

The US$450 million port investment deal was signed in Berbera in May 2016 without Hassan Sheikh's support. When the draft agreement arrived in the Mogadishu parliament the new federal president, **Mohamed Abdullah Mohamed 'Farmajo'**, was in charge, determined to stop it. He was anxious to demonstrate his support for **Qatar** and oppose the call for a blockade of Doha by the UAE, **Saudi Arabia**, **Bahrain** and **Egypt** in June 2017, and the Mogadishu parliament rejected the deal (**AC Vol 60 No 16**).

But work by DP World on the port was already under way. Any idea of using it to demonstrate goodwill between Mogadishu and Hargeisa was out of the question, especially given Farmajo's hostility to Somaliland (AC Vol 59 No 5). ●

faced with conflicting priorities. On the one hand, they wanted to secure rapid support for their offensive against *Al Shabaab*, which was under strain (**AC Vol 64 No 1**). On the other hand, they did not want to surrender sovereignty or control in the face of Emirati assertiveness. But the draft deal sent to Parliament in February 2023 contained several hard-to-swallow conditions, such as the Emiratis choosing which trainees to promote, the ability of UAE military elements to move freely in Somalia without informing the federal government, and providing total immunity to Emirati military personnel.

The deal was rejected, and Hassan Sheikh gave the impression this did not bother him. He could have held out for better terms, but he did not. The upset at this in Abu Dhabi was then compounded when the same parliament struck a Defence and Commerce agreement with **Turkey** in February 2024, despite not being allowed access to the text. (Hassan Sheikh kept it secret for 'national security reasons'.)

An infuriated MBZ thought he had been played by Hassan Sheikh. In the following months, the UAE built a new training base in Jubaland, One of Somalia's Federal Member States that had been clashing with the Mogadishu government. The UAE's move would have strengthened Jubaland in its dispute with Hassan Sheikh and Mogadishu.

BASE KILLINGS

Another point of contention arose when five Emirati and **Bahraini** trainers, including a senior officer said to be close to MBZ, were shot dead at the General Gordon military base in Mogadishu on 10 February 2024 by an *Al Shabaab* infiltrator (**AC Vol 65 No 7**). Trainees were supposed to be vetted before training at the base but the group to which the killer belonged did not go through this process, despite explicit requests from senior Somali and Emirati officers.

The reason was that Hassan Sheikh, at the request of the Southwest State President, **Abdiaziz Hassan Mohamed 'Lafta Gareen'**, and the Speaker of Parliament, **Adan Mahamed Nur Madobe**, had agreed to train a full contingent of Rahanweyn fighters without screening them.

Hassan Sheikh's need for political support from Southwest State in the coming elections – all the greater because of his deteriorating relations with Puntland and Jubaland – outweighed fears that unvetted troops could house *Al Shabaab* infiltrators who, as many Somali National Army officers fear, may yet carry out more terrorist attacks in the future. ●

MOZAMBIQUE

Chapo signs security pact with Kagame

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TotalEnergies moves to restart its $20bn gas project behind a fortified green zone after militant attacks displaced 60,000 citizens

Four years since the deployment of Rwandan and Southern African Development Community forces in July 2021, the security situation in northern Cabo Delgado remains fraught – contradicting Maputo's assertion that the insurgency is on its last legs (**AC Vol 62 No 7** & **Dispatches 6/4/21**). Security efforts remain reactive and on the back foot, including those of the **Rwandan** forces.

President **Daniel Chapo** has struggled in the ravaged province, where political and security dynamics have grown more complex along with more contestation for power across the country (**AC Vol 64 No 21**). The disputes over last October's general election are far from resolved at the national level (**AC Vol 65 No 22**, **Vol 66 No 2** & **Dispatches 7/1/25**).

The announcement of a new Status of Forces Agreement (SOFA) with Rwanda on 29 August offers no reassurance that a fresh counter-insurgency strategy in Cabo Delgado is in the offing.

The SOFA sets the legal framework within which Kigali's military operates in Mozambique and could precede the establishment of a permanent base in Cabo Delgado. It followed Chapo's two-day summit with President **Paul Kagame** in Kigali at the end of August.

REGROUPING

The leading insurgent faction, *Ahlu Sunna Wal Jammah* (ASWJ), significantly degraded in 2021 and 2022, has gradually rebuilt its operational capacity. Expert estimates of the number of active fighters vary from the low to the high hundreds. The group has shifted tactics and has been rebuilding its networks. Aside from occasional attacks on Mozambican army outposts, which have left dozens dead in recent months, it avoids direct confrontation. Its appetite to target Rwandan forces has also become more apparent.

Islamic State (IS) has maintained regular media coverage of its ASWJ affiliate, including the release on 11 August of an 18-minute laudatory video. Islamic State Mozambique (ISM), as IS calls ASWJ, has been deepening ties with communities more open to it, training new fighters in the Catupa forest stronghold, and reaching out to more remote Muslim areas.

In some districts, they have been raising taxes and income with methods that overlap with smuggling and forms of organised crime. The return of hundreds of thousands of internally displaced persons, extolled by Maputo as evidence of stability, has created new openings for these activities.

Deadly attacks in the north-eastern district of Palma in August and in Mocímboa da Praia in September belied government claims the area was pacified.

But ASWJ has also lost fighters, notably after it moved into Niassa province and a dozen were killed in an ambush by the Mozambican army in Montepuez in early June.

In the second half of July, around 60 insurgents moved south from the Catupa forests in Macomia, splitting into two groups and sowing chaos in the southern districts of Ancuabe and Chiure. One group is believed to have continued south into Nampula's Erati district to recruit new fighters before circling back north to their Macomia stronghold.

This was the fourth incursion since early 2024 – and the most violent – sending a clear message to the largely Christian community that they remain targets. Over a period of two to three weeks, the attacks displaced more than 60,000 people.

Despite advance warning of the militants' movements, Mozambican and Rwandan forces failed to respond for nearly two weeks. This may embolden insurgents to maintain a low-level, multi-pronged strategy that stretches the state's forces, prompting what one described as a clumsy 'whack-a-mole' response. Another called it 'pushing bad food around a plate'.

Local militias continue to provide frontline defence in some communities but have complicated security dynamics. Two police officers suspected of being insurgents were tortured to death in the village of Nivenevene in Chiure district in late July, according to local reports.

While insurgents sowed mayhem in southern districts, other rebel groups reappeared in late July and August along the Macomia coastline, engaging with the local communities. Overall, there were reports of insurgent activity in eight of Cabo Delgado's 17 districts in August, including several in Palma district, which shocked the authorities.

The province, home to TotalEnergies' over US$20 billion liquefied natural gas (LNG) operations, had seen almost no incidents in 2025 until now (**Dispatches 14/7/25**).

The **French** oil major is poised to resume operations, on hold since April 2021. Construction on the Afungi peninsula has been concentrating on a security perimeter defended by drones, CCTV and other high-tech systems. It signed a security memorandum of understanding with the Mozambican government whose terms are still secret (**AC Vol 62 No 10**).

GREEN ZONE

In May, the company abandoned land transport routes for all supplies and personnel movements, signalling that a 'green zone' security model, creating a heavily defended enclave, is in effect. The move has drawn sharp criticism from local business owners, who won't now be able to benefit economically from the presence of the LNG complex.

What the effect will be on ASWJ's strategy is less clear. IS has long vowed to target commercial sites, but such attacks have so far been limited. Rwanda's reputation as an effective security operator is beginning to fade. Its forces continue to provide static security and patrol major roads, ensuring a baseline of safety – but their counter-insurgency capacity remains sporadic at best.

After dislodging insurgents from a mini-caliphate on the Macomia coast in the second half of 2024, Rwandan forces withdrew their helicopter gunships. As with the Southern African Development Community (SADC) Mission in Mozambique contingent they replaced, they have failed to pacify the province, and insurgents continue to operate with relative impunity.

Community groups have noted a sharp falling off in Rwandan reactions to insurgent attacks and are waiting to see if the new security agreements translate into a greater sense of urgency. Mozambique's security forces have taken a more active role, but their impact remains questionable. Despite recent claims from Brigadier-General **Luís Barros**, commander of the European Union's Assistance Mission in Mozambique, that EU-trained Quick Reaction Force units are a 'game changer', he and others acknowledge that even with improved counterinsurgency capacity, it will take years to address the human security, political and economic drivers of alienation from the state.

Maputo is dogged by accounts of state forces committing abuses. In two incidents in August, Mozambique's navy was accused of murdering civilians along the Palma and Macomia coastlines. Coastal security remains a serious vulnerability for the under-resourced force. ●

BURKINA FASO/MALI/NIGER/RUSSIA

Putin's gambit in the Sahel as France leaves the stage

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Moscow courts the three juntas with anti-western rhetoric and promises of gold refineries and nuclear power but is struggling to counter insurgents

On 14 August, the defence ministers of Mali, Burkina Faso and Niger – Generals **Sadio Camara**, **Célestin Simporé** and **Salifou Modi** – were in Moscow for talks with their Russian counterpart, **Andrei Belousov**. This was more of an invitation than a summons – unlike in December 2019, when **France's** President **Emmanuel Macron** called five Sahelian leaders (four democratically elected at the time) to the air base in Pau, near the Pyrenees to explain rising anti-French sentiment (**AC Vol 60 No 25**). That meeting entrenched resentment more deeply than even its participants foresaw. Four years later, three of those heads of state had been ousted and French troops sent home – replaced by Russians.

Ministerial visits to Moscow have surged this year. In June, Mali's

ARMS, CYBER WARFARE AND GOLD MINES

An area where Russian support to the juntas in Bamako, Ouagadougou and Niamey is most tangible is arms supply. This is particularly attractive to the Sahelian regimes because Moscow does not appear to place any restrictions on the use of weapons it sells to the *Alliance des États du Sahel* (AES). Mali, Burkina Faso and Niger have received tanks, armoured vehicles, satellite intelligence and combat aircraft – including Mi-35, Mi-171, Mi-8, and Su-25 models. In January 2025, the Africa Corps in Mali took delivery of T-72B3 tanks, BTR-80/82A armoured personnel carriers, BMP-3 infantry vehicles, and Spartak armoured personnel carriers fitted with S-60 57mm cannons.

Deliveries have escalated in line with rising military budgets. According to the Stockholm International Peace Research Institute, the three countries spent a combined US$2.4 billion in 2024. Mali's defence budget rose by 38% between 2020 and 2024, Burkina Faso's by 108% from 2021 to 2024, and Niger's by 56% between 2022 and 2024. Mali plans to begin arms production, while Burkina Faso is preparing to manufacture surveillance drones.

Another Russian capacity is surveillance. In September 2024, Bamako signed a deal with Roscosmos, Russia's aerospace agency, for satellite coverage. Officially aimed at improving telecommunications, the system is widely seen as a tool for monitoring citizens. 'The [juntas] already know exactly who enters and exits through their airports and who's in transit,' a regional security official told *Africa Confidential*. 'They get this surveillance stuff from Russia, which as you know is an absolute expert in this area. Nothing escapes them.'

This month, a WhatsApp message circulated in Mali warning users that all social media content was subject to government scrutiny and that dissenting voices could face punishment. Given Mali's tightly controlled information space, such caution may be warranted. Russia itself leads in internet censorship – in July, the Duma passed legislation criminalising VPN advertising and access to 'extremist' content.

The AES is likely to follow suit. Already, producing material disliked by the authorities can result in serious consequences. WhatsApp – with an estimated 100 million users in Russia – is reportedly set to be replaced by a domestic platform called Max. Russia continues to run disinformation campaigns via propaganda platforms such as African Initiative, including 'documentaries' promoting the Kremlin's narrative on **Ukraine** (**AC Vol 65 Nos 16** & **18**).

Beyond geopolitics, Moscow sees the Sahel as a commercial opportunity. Gold is the most obvious asset from the region. In Niger, Moscow may soon control uranium licences withdrawn from **French** firm Orano and **Canadian** company GoviEX, following a visit to Niamey in July by energy minister **Sergei Tsivilev**, which saw the signature of an agreement for state nuclear agency Rosatom to share its know-how.

Tapping into longstanding local resentment of France's presumption that the Nigériens should be content to remain providers of the raw fuel but could never themselves aspire to nuclear electricity generation, Tsivilev talked of creating 'an entire system for development of the peaceful atom in Niger'. Rosatom has also pledged to construct solar and nuclear power plants in Burkina Faso and Mali and to train local technicians.

The construction of nuclear power stations could well be some way off, given the huge capital costs, the technical challenges and the security risks that the Sahel presents. A reminder of the potent threats these present has come with news that JNIM has seized Farabougou, a town just 400 km north of Bamako, and its military base.

More immediately practicable is the expansion of Russian involvement in the gold sector. In Mali, where Wagner has had mining operations for some time, the Russian group Yadran – an oil firm now active in construction, waste management and industrial production – is building a gold refinery and a cotton processing plant.

In countries where secondary and higher education remains heavily derived from French knowledge and practice, Moscow wants to extend the promotion of its technical know-how. In August, Tsivilev announced that engineering courses based on the Russian approach would be opened in Malian, Burkinabè and Nigérien educational institutions.

Yet despite the flurry of announcements, little has materialised beyond extractive sector activity. While insurgencies, food crisis and seasonal flooding persist, it is UN agencies and western governments, rather than the AES' new military sponsor, which provide most of the humanitarian aid. ●

foreign minister **Abdoulaye Diop** and prominent junta figure Gen **Ismaël Wagué** travelled to the Russian capital to discuss Mali's elusive 'stabilisation'. This followed an April summit where Russia's Foreign Minister **Sergei Lavrov** pledged stronger military cooperation and closer alignment of foreign policy – notably at the UN. Moscow is actively seeking broader diplomatic recognition for the three states, now known as the Alliance des États du Sahel (AES).

Mali's junta – the first to seize power post-Pau – is arguably Russia's most committed ally. Camara, the regime's key link to Moscow and the man who brought in Wagner mercenaries, called defence 'the largest area of cooperation between our two countries' (**AC Vol 63 No 7**). Earlier this year, Burkina Faso's ambassador to Russia, **Aristide Ludovic Tapsoba**, described the relationship as 'essentially military'.

In Moscow, the four defence ministers signed a Memorandum of Understanding on closer cooperation – the details of which are secret. Belousov's promise of 'comprehensive assistance' is vague, and Russia's credibility as a stabilising force is undermined by Wagner's poor record (**AC Vol 66 Nos 12** & **17**). After Wagner's defeat at Tinzaouaten on the Mali-**Algeria** border, its battlefield role diminished (**AC Vol 65 No 16**).

There are repeated reports of human rights abuses against local Peulh communities committed by Wagner operatives – reports confirmed by UN and Human Rights Watch research. The mercenaries' brutality may have driven Peulh youths to join the Katibat Macina arm of the *Jama'at Nusrat ul-Islam wa al-Muslimin* (JNIM) jihadist alliance.

In June 2025 it was confirmed that Wagner, as an entity, was leaving Mali. But many of its fighters have stayed and now continue operations under the banner of Africa Corps, a paramilitary structure under direct control of Moscow's formal command structure.

Bamako has never confirmed the scale or nature of the Wagner deployment but it was widely reckoned to be around 1,000 fighting men. There is no sign of it being cut under its relabelled guise.

Russian soldiers are frequently sighted in four regions. Based in Kidal and smaller outposts such as Tessalit, they're fighting against Tuareg separatists in the Saharan north; they operate from the major base at Gao, the largest town in the north-east, and have maintained the government's control of Ménaka, Mali's smallest regional capital, surrounded by terrain in the hands of Islamic State in the Greater Sahara (ISGS).

They continue to operate in central Mali. It is there that they have been most often accused of committing abuses against Peulh communities. There are also reports of attacks by Russian fighters on settlements slightly further west, under pressure from an aggressive expansion of JNIM activity.

The Russian presence in Burkina Faso is different. Burkina's tradition of national self-reliance dates back to the **Thomas Sankara** government (1983-87). So exploratory contacts by Wagner never led to it playing a major role in the campaign against jihadist groups. Instead, Captain **Ibrahim Traoré**, who seized power in September 2022, has brought in another Russian group known as the Bears Brigade linked to Redut military contractors to protect his regime (**AC Vol 64 No 19**). For a brief period, several hundred mercenaries were based at Ouagadougou airport. But after just a few months their numbers were drastically reduced and it is now just a few heavily armed Russians remain, providing personal protection for Traoré. Having recently awarded himself another five years in power, Traoré has multiple enemies within the national armed forces despite – or because of – his phenomenal glorification campaign on social media.

Neither has the Nigérien army, long regarded as the most capable of the Sahelian national forces, been reinforced by significant numbers of Russian operatives. But Moscow has provided some military training as well as air defence during the brief period after the July 2023 military takeover when Ecowas was considering intervention to reverse the coup. **Italian** military training forces are also present, though operating quite separately.

Given this mixed picture, and the often counter-productive operations of the Wagner/Africa Corps units in Mali, it seems that Moscow's appeal lies less in effectiveness than in its anti-imperialist image. ●

LESOTHO/UNITED STATES

Tariff shock, aid cuts and graft are wrecking Matekane's plan

Published online 4 September

President Trump's threat of 50% tariffs decimated textile factories, exposing the government's limited choices

Almost three years after **Sam Matekane's** Revolution for Prosperity (RFP) stormed to power on an anti-corruption and pro-business platform, Lesotho is reeling from tariff whiplash, a suspended United States development compact and an *El Niño*-driven drought leaving 700,000 facing severe hunger (**AC Vol 63 No 21**). Lesotho's textile industry is in tatters.

In April, US President **Donald Trump** threatened 50% tariffs against Lesotho which produces jeans for the US market. The tariffs were trimmed to 15% in August but by then the damage was done. Factories had begun laying off workers and closures followed (**AC Vol 66 No 16** & **Dispatches 7/4/25**). It is unlikely the sector will survive in any robust form.

Matekane's RFP had promised to break the cycle of corruption that has plagued Lesotho since the advent of coalition governments in 2012. Drawing on his business acumen and technocratic credentials, Matekane pledged to deliver economic development and said he wanted to break the political mould.

There was a wave of new energy but only 38% of registered voters turned out. That reflects the alienation felt by many Basotho. MPs from the RFP have been dogged by corruption scandals, and the parastatal Lesotho Electricity Company (LEC) is bankrupt.

Allegations of looting and mismanagement dominate weekly headlines before parliament's Public Accounts Committee. The latest reports centre on a no-bid contract – worth 1 billion loti (US$56.4 million) – awarded to **China's** Beijing Jingyuntong Technology (BJT) by Minister of Finance **Adelaide Retselisitsoe Matlanyane**.

Public trust in the government is ebbing as social and economic conditions worsen. The lingering effects of Covid-19 and a drought over the past year prompted the government to declare a state of disaster from August 2024 to March 2025.

Lesotho's formal economy has been buffeted by global headwinds, especially the Trump administration's weaponisation of trade tariffs. The end of the African Growth and Opportunity Act (AGOA) trade benefits – with no sign yet of a replacement arrangement – has devastated Lesotho's textile industry, which had employed around 30,000 workers, mostly women supporting extended families (**Dispatches 25/2/25**).

Deep cuts to the US Agency for International Development (USAID) and uncertainty over the US President's Emergency Plan for AIDS Relief (PEPFAR) have hit hard – particularly in rural areas, where HIV rates remain high and access to clinics and medication are limited. Around 18.5% of adults live with HIV, with a prevalence among women at 23.5%.

The government's budget has been derailed by Washington's cancellation of Millennium Challenge Corporation funding. In 2022, Maseru signed a second compact worth $300m to support irrigated agriculture, business development and health. Funds began flowing in 2024 but were halted by Washington in early 2025, with no prospect of reinstatement. The loss has hit long-term budgeting, especially capital spending.

The weaker US dollar has undermined the diamond sector, already suffering from falling demand. In mid-July Letšeng Diamonds – Lesotho's largest mine – announced a 20% workforce reduction. In late August, management at Mothae, the country's second largest mine, announced its entire workforce was being retrenched on 31 August, having already placed 400 employees on forced leave and slashing pay by 50% in early July.

SADC GAINS

A glimmer of relief comes from the textile mills around Maputsoe, which are expanding into the **South African** market. Several mills have announced new contracts and hires, underscoring the importance of a better-integrated Southern African Development Community (SADC) economy. But these gains are modest. They do little to pay school fees or feed the families of recently laid-off workers. Youth unemployment is reckoned at 50%. The government declared another state of disaster in July.

All this exacerbates the threat of political instability. The politicisation of the security forces led to the collapse of successive governments in the mid-2010s, including the assassinations

SECURITY FORCES ACCUSED OF EXTRA-JUDICIAL KILLINGS

Lesotho's intelligence and security forces have a long history of abuse. Despite some reform progress and a measure of stability between agencies, they remain a potential flashpoint – underscoring the need to strengthen institutional oversight and remedy mechanisms.

Following a three-year deployment with the Southern African Development Community (SADC) mission in **Mozambique** between July 2021 and June 2024, the Lesotho Defence Force returned to domestic headlines in September 2024, accused of torture and extrajudicial killings during operations targeting gangsterism and the recovery of illegal firearms. No progress has been made on calls for formal investigations.

On 18 July, the heads of the Lesotho Mounted Police Service and other national security bodies held a press conference alleging that a group calling itself *Malata Naha* ('land claimers') is recruiting Basotho youth and training them on remote farms in **South Africa**, allegedly with foreign support. South African authorities initially dismissed the claims but a joint meeting of senior intelligence and security officials from both countries in early August signalled a commitment to investigate the allegations and assess their impact on Lesotho's internal political dynamics and potential instability in South Africa's border regions.

The allegations are linked to the arrest of MP **Tšepo Lipholo** on 2 July, who faces charges of sedition and incitement in connection with his campaign to reclaim contested territories from South Africa. Lipholo, leader of the Basotho Covenant Movement, has advocated, including a petition to the UN, for the restoration of land he says was unjustly taken from Lesotho during colonial rule – including parts of the Free State, Eastern Cape and KwaZulu-Natal. On 29 August, Lipholo was denied bail by the High Court. ●

of two Lesotho Defence Force (LDF) commanders in 2015 and 2017 (**AC Vol 63 No 19**). These followed an attempted coup in 2014 that forced then Prime Minister **Tom Thabane** to South Africa. That era also saw repeated rights violations by the army and police. Some progress has been made but it's proving difficult for the government to rebuild trust.

This mix of economic and political uncertainty deters foreign investment. A recent African Development Bank report warns that a weak and largely 'captured' judiciary raises doubts about regulatory agencies.

Afrobarometer's 2024 survey found that support for democratic institutions has declined – with 60% of respondents saying they would prefer rule by 62-year-old King **Letsie** III.

The lustre of the RFP-led coalition's 'revolution' may be fading – if it ever truly existed. Recruiting opposition figures and placing a successful businessman at the helm has not been enough to address Lesotho's entrenched economic challenges.

Yet the RFP-led government is on track to complete a five-year term – the first since 2012. SADC's latest round of support, in place since 2020, has helped stability and advanced constitutional and security reforms. But progress has been patchy, and the foundations for a sustainable democracy are far from secure. ●

NAMIBIA/CANADA

Parliament tests anti-corruption vow

Published online 2 September

MPs are to vote on a call to investigate claims that Canada's ReconAfrica broke accountability and environment rules

Canada's Reconnaissance Energy Africa – ReconAfrica – first started drilling for oil and gas in the Kavango basin of north-eastern Namibia four years ago and has been mired in controversy ever since. Part of the exploration area is in the catchment area of the vast Okavango Delta, a UNESCO World Heritage Site and one of the most spectacular wildlife havens in Africa.

The Calgary-based firm has faced repeated allegations of gross environmental transgressions, human rights violations and stock market manipulation but has 'categorically' denied any wrongdoing.

On Thursday 4 September Landless People's Movement MP **Eneas Emvula** will table a motion in the National Assembly for a full parliamentary investigation into ReconAfrica and a possible temporary halt to any further oil and gas exploration by the firm.

The motion comes after the publication of a previously shelved report by the Namibian parliament's Standing Committee on Natural Resources that contains critical findings about ReconAfrica and government bodies that dealt with the firm.

It noted strong public support for oil exploitation but said that the government and ReconAfrica had failed to consult local communities, did not follow all legal requirements, and risked contaminating groundwater, while recommending that the exploration continue. ReconAfrica says it consulted all relevant authorities, did not cause any contamination and observed the law scrupulously.

The controversy is seen as a test of President **Netumbo Nandi-Ndaitwah's** pledge of zero tolerance towards corruption in the country's fledgling oil and gas sector. Investors and environmentalists alike will judge how the government handles the case in the light of Namibia's status as what's been described as 'one of the most promising petroleum frontiers'.

A flurry of major oil discoveries has been made in Namibia's part of the offshore Orange Basin in the past four years.

SCRUTINY

The Independent Patriots for Change (IPC), which has 21% of the seats in parliament, said it will support the motion. The LPM has only 5% of the seats, so together they are a long way short of the majority needed to get the inquiry going. The ruling SWAPO Party (53% of the parliamentary seats) has not said which way it will vote.

Emvula believes 'it can go either way' and he would not be surprised if the motion was passed. 'They [SWAPO] showed signs of resistance when the notice of motion was tabled,' he said. 'But the bottom line remains that none of the [committee's] 19 recommendations were implemented.'

The now-public report finds fault

with ReconAfrica and the government. The report is a response to a petition by Saving Okavango's Unique Life (SOUL) civil society organisation and other CSOs that calls for a halt to all oil drilling. It says the firm received special treatment from the previous government which did not issue any fines or actions against it.

In October 2020, the firm briefly hired powerful Namibian middleman **Knowledge Katti**, who had close ties to then President **Hage Geingob**, as a media relations consultant (AC Vol 64 No 11). It has also enjoyed public endorsements by high-ranking government officials, such as former Minister of Mines and Energy, **Tom Alweendo** (AC Vol 62 No 12).

In June 2022, ReconAfrica had its original environmental clearance certificate amended, which would allow the firm to drill 12 more wells. The amendment relieved the firm of the necessity to undertake a new full environmental impact assessment (EIA). The firm insists all its actions were within the law.

Several conservancies and forest communities lodged an appeal on the grounds of inadequate public consultation and no new EIA. The Minister of Environment, **Pohamba Shifeta**, took nearly three years to rule on the appeal and finally rejected it in March 2025, just two days before he left office. He did not notify the appellants of his decision.

In late June 2021, ReconAfrica benefited from a PR campaign backed by the government against 'misinformation' on its exploration in the Kavango Basin.

In the same month, ReconAfrica donated N$15 million (US$850,000) to the Prime Minister's Office to support a Covid-19 vaccine rollout. We asked the office what they had done with the money but received no reply. Activists have questioned why the donation did not go to the Ministry of Health. There is no suggestion the payment influenced the PMO's actions. The *Namibian Sun* reported in 2022 on a vehicle hire scheme run by the firm under which they paid politicians in the Kavango region to compensate them for using their private vehicles. A company spokesperson said they had paid over N$7m in hiring private cars from 2020 to around October 2022.

The parliamentary committee also found that ReconAfrica started operating without required leasehold or water-use and disposal licences. Key stakeholders such as regional conservancies, traditional authorities and local communities were not adequately consulted, the report said.

ACTIVISTS TARGET CANADIAN AUTHORITIES

In 2021, ReconAfrica conducted a 450-kilometre seismic survey using thumper trucks to map underground oil prospects. Some residents reported that the heavy vibrations cracked the walls of their houses and many have still not received compensation for this or the loss of their agricultural land. The company denies there was anything but light impact.

A Kavango East resident, **Andreas Sinonge**, in 2021 filed a High Court case against the company for illegal occupation and drilling on his family's crop field. After two years, he reached an out-of-court settlement with the firm, which did not admit liability.

UNESCO has criticised ReconAfrica's environmental impact assessments (EIA) and called for 'a rigorous and critical prior review, including an EIA that corresponds to international standards before any further development of a project'.

The International Union for Conservation of Nature (IUCN) also pointed to methodological flaws and shallow analysis in ReconAfrica's EIAs, as well as deficiencies in the baseline data and wildlife impact studies used.

In one 2019 EIA the list of interested and affected parties (IAPs) included individuals who had already passed away, such as Queen **Angelina Matumbo Ribebe**, who died in 2015.

Activist attempts to take action against ReconAfrica in Canada, where the firm's primary listing is located, have so far come to nought.

In April 2024, the University of Toronto's International Human Rights Program (IHRP) and Saving Okavango's Unique Life (SOUL) filed a 187-page complaint to the Canada Ombudsperson for Responsible Enterprise (CORE) against ReconAfrica over alleged human rights abuses in Namibia.

But the complaint is still stuck in the initial assessment stage following the departure of the previous ombudsperson. The position remains vacant. The Canadian government is assessing CORE's future, which means ruling on the IHRP's complaint will depend on whether a new ombudsperson is appointed or not. ●

The report indicates the Ministry of Mines and Energy gave the company strong backing. In a 2022 letter to ReconAfrica's former CEO **Scot Evans**, the ministry advised the firm that under Petroleum Exploration Act No.2 of 1991, no land ownership or leasehold right is required at the exploration stage. The Kavango East Communal Land Board subsequently cancelled the leasehold right at Kawe that it had granted to ReconAfrica, so the firm appears to be operating without any leasehold rights in this region.

IN THE WILDERNESS

ReconAfrica's environmental clearance certificate restricts it to using only existing roads, but satellite photographs published by *National Geographic* magazine cast doubt on whether this was adhered to. The magazine reported in 2022 that the company had 'bulldozed through protected land', and a year later that it 'ripped through a protected wilderness to find oil'.

Those images appeared to show exploration activities have resulted in tracks cut through communal croplands and virgin wilderness, possibly disrupting wildlife corridors within conservancy areas. The company is also accused of drilling in protected conservancies and community forests.

The firm insists it only used existing tracks and roads and has not drilled in unauthorised areas. ReconAfrica dismissed the magazine article as 'a hit piece'.

In 2022, the Royal Canadian Mounted Police (RCMP) launched an investigation into ReconAfrica over allegations of corruption, foreign bribery and fraud.

The RCMP's sensitive and international investigations team in Ontario closed the file without laying any charges.

RMCP did not respond to our request for an updated status report on their investigation.

Last year, ReconAfrica paid US$10.8m to shareholders in different jurisdictions without admitting any liability to settle class action lawsuits lodged over allegations it has spread false or misleading information to inflate its share price.

Meanwhile, all five of the Namibian test wells have come up dry and the firm has delivered no evidence that any of its 'significant indications of oil' will turn into commercially viable finds. ReconAfrica's share price on the TSX Venture Exchange (TSXV) in Canada has plummeted to CA$0.52 (US$0.37) per share from its all-time high of CA$13.84 on 24 June 2021.

For many Namibians, the prospect of significant income from oil and gas is extremely attractive, but critics say that potentially endangering one of the most biodiverse ecosystems and largest carbon sinks on earth, which provides fresh water to thousands of people and large and unique wildlife populations is simply not worth the risk. ●

DISPATCHES

CÔTE D'IVOIRE

Thiam faces election judgement day

8 September

Should the candidate's ban be upheld, President Ouattara may face no credible challenger in October vote, raising concerns of violence.

Tidjane Thiam faces a judgement by the Constitutional Court this week on his application to be reinstated as a candidate for the presidential elections on 25 October.

A former chief executive of banking giant Credit Suisse, Thiam, who published a memoir of his political and banking career last week, insists he still has presidential ambitions despite the ban due to a dual nationality issue.

He filed his candidacy last month to run against President **Alassane Ouattara**, who is seeking a fourth term. Yet Thiam was not one of the 60 candidates approved by the Ivorian Constitutional Council, a number that included more than 30 independents.

In April, a court removed Thiam from the electoral register and banned him from contesting because when he registered as a voter in February he had **French**-Ivorian nationality, which bars him from the presidential race (**AC Vol 66 No 9**).

Days earlier the opposition *Parti démocratique de Côte d'Ivoire* had confirmed Thiam as their candidate. Defeat in court would shut them out of the elections. With the deadline for candidate applications having closed, **Jean-Louis Billon**, Thiam's main rival for the PDCI nomination, would not be able to take his place.

The blocking of Thiam's candidacy as well as that of former president **Laurent Gbagbo**, the leader of the *Parti des Peuples Africains–Côte d'Ivoire*, and former Gbagbo minister **Charles Blé Goudé**, has removed Ouattara's key rivals and fractured the opposition (**AC Vol 66 No 15**). Thiam and Gbagbo's parties have formed a coalition though neither has a candidate approved to contest in October.

That has prompted concerns among civil society groups that an election stitch-up for Ouattara could lead to political violence not seen since Gbagbo was defeated by Ouattara in 2010. Last week, **Ghanaian** authorities announced that they had received 172 asylum seekers from Côte d'Ivoire in the second half of August.

SOUTH AFRICA

Pretoria cancels naval drills with Russia and China due to hosting G20 summit

8 September

President Cyril Ramaphosa appears unwilling to risk any action that may further anger the Trump administration

South Africa has scrapped plans to hold a naval exercise with **China** and **Russia** in November in a bid to avoid diplomatic embarrassment as it would have coincided with a G20 summit hosted by President **Cyril Ramaphosa**.

In a statement, Department of Defence Head of Communication **Siphiwe Dlamini** said the postponement of Exercise Mosi III was 'in view of activities related to South Africa's G20 Presidency'.

The event would have involved Russian and Chinese warships being in South African waters.

The postponement will help 'ensure that the exercises do not impact on the logistical, security and other arrangements associated with South Africa's G20 Presidency,' Dlamini claimed.

In reality, the decision may be more about persuading **United States** President **Donald Trump** to attend the G20 Leaders' Summit in Johannesburg on 22-23 November. That set piece event will mark the end of a South African presidency, with the US government taking up the mantle (**AC Vol 66 No 16**).

The Trump administration has boycotted meetings and summits hosted by Pretoria this year. Among African governments, Trump has singled out Ramaphosa's for harsh censure, imposing 30% tariffs on exports to the US and making false claims of genocide being perpetrated against white farmers (**AC Vol 66 No 11**).

However, it is surprising that it has taken so long to postpone the military exercises with two of the US's main adversaries, especially given that Russia remains subject to a raft Western sanctions because of its war against **Ukraine**.

SUDAN

RSF intensifies siege of El Fasher by building barrier

8 September

City is strategically important as it is SAF's final foothold in Darfur

The Rapid Support Forces (RSF), led by General **Mohamed Hamdan Dagalo 'Hemeti'**, have intensified efforts to take control of El Fasher, the capital of North Darfur, by building 31 kilometres of fortification around the city to prevent people from leaving.

The earth barrier has created a 'kill box', according to recent satellite imagery obtained by Yale University's Humanitarian Research Lab. More than 500,000 civilians are estimated to be in the city.

Taking El Fasher, which has been under an RSF siege for more than a year, has assumed massive strategic importance as it is the last major foothold in Darfur for the Sudan Armed Forces (SAF) of General **Abdel Fattah al Burhan** (**AC Vol 66 Nos 14** & **17**). In July, the RSF established a parallel administration in Darfur but they have struggled to find countries that will recognise it (**Dispatches 11/8/25**). Capturing El Fasher is crucial to Hemeti's legitimacy and RSF leverage in future talks on a peace settlement.

The battle for El Fasher has already come at huge human cost. The RSF has suffered heavy casualties in its offensives and thousands of civilians have been killed. On 1 September, the Sudan Doctors Network reported that RSF shelling had killed at least 18 people and injured more than 100 others.

These moves mark the latest attempts by the RSF to break the stalemate in the civil war. The SAF has consolidated its control of the capital Khartoum and most of the country's east, including Port Sudan on the Red Sea.

The RSF, meanwhile, controls vast swathes of Saharan territory in west Sudan and is besieging the city of El Obeid as it seeks to build its strength in central regions.

SOUTH AFRICA/EU

Pretoria demands equal treatment to US on EU carbon border tax

1 September

Concessions to Washington are likely to ramp up opposition to levy

South Africa has stepped up its demands for concessions from the EU's Carbon Border Adjustment Mechanism (CBAM) after Brussels' recent deal with Washington. In a letter to the European Commission on 26 August, **Xolelwa Mlumbi-Peter**, deputy director of the Department of Trade, Industry and Competition, argues that South Africa and other developing economies should receive the same treatment the EU granted to the **United States**.

The 21 August framework agreement between the US and the EU, which sets out the deal on tariffs and other trade matters agreed by US President **Donald Trump** and European Commission President **Ursula von der Leyen**, promises 'additional flexibilities' for American firms under CBAM without spelling out the detail.

The levy, which will start being applied in the coming months, seeks to prevent EU industries from being undercut by requiring importers to pay a carbon price equivalent to that paid by European producers under the EU Emissions Trading System (**AC Vol 64 No 13**).

However, if US industry has obtained a blanket exemption from CBAM that would be poorly received by the likes of South Africa and **India**, who had previously threatened to take the EU to the World Trade Organization, claiming that CBAM breaches the WTO's non-discrimination principle.

South Africa has been one of the leading critics of CBAM for some time, warning that its steel industry would be badly hit despite contributing little to global carbon emissions. South Africa's Presidential Climate Commission estimates that CBAM would cut Africa's exports to the EU by 30-35% – worth between €1.7 billion and €2.1bn – by 2030.

Concessions were also requested by Pretoria at a bilateral summit with the EU in March.

Carlos Lopes of the African Climate Foundation has warned that CBAM could lead to exports of aluminium to the EU from Africa dropping by 13.9%, and iron and steel by 8.2%

The EU Commission, however, has indicated that it plans to expand the scope of CBAM later this year (**AC Vol 66 No 9**).

ETHIOPIA

Dangote to build $2.5 billion Ethiopian fertiliser plant

1 September

Nigerian company also signs deal to construct gas pipeline

Prime Minister **Abiy Ahmed's** government plans to make Ethiopia a major African fertiliser producer after signing a US$2.5 billion agreement with **Nigeria's** Dangote Group to build one of the world's largest fertiliser plants.

Abiy says that the complex, which will be in Gode in Somali Regional State, close to unexploited gas deposits, will produce three million metric tons of fertiliser each year and is 'a decisive step in our path to food sovereignty'. More than 70% of Ethiopian workers are employed in agriculture, most of them smallholders.

The agreement also features plans to build a long-delayed pipeline to transport natural gas from the Calub and Hilala gas fields, though it is still unclear how close to production those sites in eastern Ethiopia are.

In July, Abiy told parliamentarians in Addis Ababa that they would be producing gas soon and that a fertiliser facility would be operational after 40 months, setting early 2029 as the target date. Dangote Group already has a cement plant in Ethiopia, indicating that unlike previous schemes it has a good chance of seeing the project through to completion.

The investment deal is a major boost for Nigerian billionaire **Aliko Dangote** whose group will own 60% of the venture and is emerging as a rival to **Morocco's** parastatal OCP group – which was previously planning a fertiliser plant in Ethiopia – as the continent's main fertiliser manufacturer.

The Gode facility will be the second fertiliser complex built by Dangote, with the first in the Lekki Free Trade Zone on the edge of Lagos (**AC Vol 65 No 17**).

The deal marks 'a pivotal moment in our shared vision to industrialise Africa and achieve food security,' said Dangote.

RWANDA/US

Rwanda takes first US deportees, but terms of deal remain secret

1 September

Denmark among European countries considering follow UK and US lead

Rwanda has become the latest African state to accept foreign deportees from United States after confirming that it had received seven people expelled by Washington.

Although it is unclear what, if any, incentives are on offer to President **Paul Kagame's** government, Kigali said in early August that it would accept up to 250 deportees from the US. Government spokesperson **Yolande Makolo** told journalists on 28 August that they had been 'accommodated by an international organisation'. In addition, those approved for settlement in Rwanda will receive workforce training and health care.

Uganda, **Eswatini** and **South Sudan** have also agreed to take US deportees but without setting a specific figure (**AC Vol 66 No 15**).

The idea of paying Rwanda to accommodate asylum seekers was minted by Conservative **United Kingdom** Prime Minister **Boris Johnson** only to be scrapped in July 2024 by the incoming Labour government. But unlike the UK plan, which committed to paying Rwanda £300 million per year, the terms of the deals brokered by the Trump administration have been kept secret (**Dispatches 29/5/24**).

In the meantime, EU officials, despite the bloc previously questioning whether such a scheme would breach international asylum law, are now actively considering them. **Denmark**, which hold the EU Council's six-month presidency, has put the idea of creating 'return hubs' in African countries and others on the agenda for EU home affairs ministers. ●

POINTERS

ETHIOPIA'S DEBT DIPLOMAT MAMO MIHRETU BOWS OUT

The 3 September resignation of National Bank of Ethiopia (NBE) Governor **Mamo Mihretu** – one of Prime Minister **Abiy Ahmed's** closest economic confidants – surprised bankers in Addis Ababa. Mamo says he plans to 'pursue other passions and tackle other challenges', prompting speculation that if he was not sacked, he may have been asked to stand aside.

But Mamo, we are told, has not been put out to pasture by Abiy. His 'other challenges' appear to include an international post, most likely with the African Development Bank. At a farewell gathering at NBE headquarters on 4 September, Abiy praised Mamo's contributions to 'historic and effective economic reforms'. We hear Mamo is likely to take a senior role – at vice-presidential level or above – at the AfDB in Abidjan.

Mamo spent eight years with the World Bank before becoming Abiy's Senior Economic Advisor and chief trade negotiator in 2018. He oversaw Ethiopia's accession to the World Trade Organization, its role in the creation of the African Continental Free Trade Area, and its recent entry into the BRICS group.

He led the 2019 drafting of the Home-Grown Economic Reform Agenda, with its Bretton Woods-style prescriptions, after the government's debt service ballooned. But the market reforms were derailed by the two-year civil war in the northern Tigray region (2020-2022) which isolated Ethiopia – especially in western capitals – and weakened the economy.

Among the policies delayed by the war was the modernisation of Ethiopia's financial sector and its exposure to foreign competition. Mamo's main achievement before becoming central bank governor was the creation of Ethiopian Investment Holdings, the country's first sovereign wealth fund. Its assets came from the takeover of state-owned enterprises, notably Ethiopian Airlines.

Most importantly, Mamo has acted as an economic firefighter – more influential than long-serving Finance Minister **Ahmed Shide**. He led the debt relief negotiations under the G20 Common Framework and was Abiy's point man in brokering a US$3.4 billion four-year credit with the IMF last September, a key condition of which was floating the birr (**AC Vol 65 Nos 16** & **19**).

The market-oriented reforms Mamo helped design include austerity measures: ending cheap credit for indebted state enterprises, curbing government borrowing from the NBE to fund the deficit, privatisation and floating the currency. After Mamo's exit, Abiy may try to ramp up borrowing and spending ahead of next year's elections – but the IMF will have other ideas.

After a decade of high growth – partly achieved through debt-funded infrastructure spending, such as for the Grand Ethiopian Renaissance Dam inaugurated this week – the liberalising measures were welcomed by markets and international financial institutions keen to bid farewell to the state-led model. The IMF has forecast growth averaging 7% over the next four years (**AC Vol 66 No 8**).

But the reforms have done little to ease the cost-of-living crisis. Annual inflation is now heading towards single figures, after averaging 34% in 2022. The birr's value has fallen by about 30%, devaluing Ethiopians' savings and raising import costs. Abiy may have decided that now is the time to start pleasing the voters at home – rather than the wonks in Washington. ●

UN/Kenya

RELOCATION AND DISLOCATION

The relocation of several United Nations agencies – including UN Women, the UN Children's Fund and the UN Population Fund – to Nairobi, as part of the UN80 restructuring programme drafted by Secretary-General **António Guterres**, has brought considerable relief to high-end estate agents in the Kenyan capital. Many had feared a downturn in the property market following the exodus of foreign staff triggered by USAID cuts (**Dispatches 28/1/25**). Up to 1,000 jobs are expected to be relocated to Nairobi but most will be offset by fresh layoffs. The UN High Commissioner for Refugees has confirmed it will cut 3,500 jobs globally by the end of October, along with hundreds of temporary contracts.

Thousands of existing staff at the UN Office in Nairobi (UNON) remain anxious about their own futures. Major redundancies have also been made at UN-Habitat and the World Food Programme, both of which have reported significant funding shortfalls this year (**AC Vol 66 No 12**). Officials told *Africa Confidential* that dismissals have occurred weekly since January, leaving staff on temporary contracts – even those nominally secured until December 2026 – effectively operating on a week-to-week basis. Further clarity has been promised following the opening of the UN General Assembly (UNGA) on 9 September, with officials expecting additional restructuring and job cuts in Quarter Four.

Insiders do not expect major decisions on internal restructuring at the UNGA in New York. To meet growing demand, the UN has approved nearly US$340 million in expansion projects at UNON, including six new office buildings and a $265.6m upgrade of its conference facilities.

Benin

TALON TO STEP ASIDE

Finance minister **Romuald Wadagni** has been named joint presidential candidate of the governing *l'Union progressiste pour le renouveau* (UPR) and *Bloc Républicain* (BR) for April 2026 – confirming President **Patrice Talon** will honour the constitutional two-term limit.

The announcement follows **Côte d'Ivoire's** 83-year-old President **Alassane Ouattara** announcing his bid for a fourth successive term and brings relief to officials in the Economic Community of West African States, seeking to restore faith in constitutional rule amid the populist pull of Sahel juntas (**AC Vol 65 No 13** & **Dispatches 8/9/25**).

'Once again Benin inspires the whole of Africa,' said one delighted analyst in a military-ruled state, recalling its role in the democratic wave that swept across much of francophone Africa from 1990 to 1992. Given Talon's position as Benin's leading tycoon – with substantial personal interests in the key cotton and trade sectors – his oft-repeated pledge to step down next year had been met with scepticism, especially after his attempt to advance constitutional reform legislation was blocked by opposition MPs and BR dissidents (**AC Vol 65 No 12**). The surprise September 2024 arrest and subsequent conviction for coup plotting of his politically ambitious former business associate, **Olivier Boko**, was hardly reassuring for most Béninois (**AC Vol 65 No 20**).

But on returning from holiday to host a UPR executive meeting at his home overnight on 30-31 August, Talon confirmed his support for Wadagni – a loyal technocrat who joined government in 2016 after working at Deloitte in **France** and the **United States**. His stewardship of the finance portfolio has drawn wide praise, with growth at 6%, and Talon has increasingly involved him in defence meetings – a key priority amid jihadist attacks in the north.