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BLUE LINES

Some rights campaigners argue that now most western governments, led by the US, have dropped their strictures on corruption and stolen elections, credit rating agencies could offer the most effective constraint. That hopeful hypothesis hasn't played out in practice so far.

But there may be other limits on authoritarian regimes.

Sudan under General Omer Ahmed Hassan el Beshir never qualified for a credit rating but was widely regarded as one of the most brutal in the world. And yet, thanks to serial financing deals with leading international banks and oil companies, it was able to pay for the systematic repression of opposition, killing over 300,000 people in Darfur. Belatedly, the bill for that has landed with the banks. France's BNP Paribas has been found guilty of complicity in genocidal actions by breaching sanctions to sell financial services to then President Beshir. BNP's shares have tumbled by 10% since a US jury awarded US\$20.75 million to three Sudanese plaintiffs, a move that could lead to a class-action lawsuit of 23,000 Sudanese in the US that lawyers say could 'seek billions more in recovery'. BNP says it will appeal, describing the court ruling, which relates to actions by Beshir's regime a decade ago, as 'clearly wrong'. Justice delayed is better than justice denied. Credit Suisse was fined for its role in Mozambique's 'hidden loans' scandal almost a decade after the event and after billions of dollars had left Maputo's coffers.

KENYA

After Odinga, opposition politicians jostle for position

A generational battle to decide who succeeds the veteran leader may also seal the fate of President William Ruto's government

Until the death of Raila Amolo Odinga from a heart attack on 15 October, President William Samoei Ruto's path to re-election in August 2027 had seemed clear: having turned his back on the central Mount Kenya region, he would need Odinga to deliver his Western and Coastal support bases under a pact offering Odinga's Orange Democratic Movement (ODM) a string of key ministries and perhaps the deputy presidency.

The agreement between Odinga and Ruto last July – days after Ruto sacked his cabinet in response to Gen Z protests which swept the country and even entered parliament – put five ODM members into senior cabinet positions and gave junior ministerial jobs, senior civil service posts and parastatal appointments to dozens of others. But it has never been codified in a formal coalition agreement beyond a 10-point Memorandum of Understanding released in February that was strikingly short on detail ([AC Vol 65 No 16](#) & [Vol 66 No 6](#)). Odinga's death made Ruto the politician most obviously vulnerable to a shake-up in ODM's leadership.

Odinga's state funeral on 17 October – like most Kenyan political funerals – was part campaign rally, part mourning. Ruto, the chief mourner, used his eulogy to insist that he still needs ODM, and he is likely to increase his use of presidential patronage in the coming months to keep the party on board ([Dispatches 20/10/25](#)).

'The strength of ODM matters to me because it is how we are going to have a strong democracy,' Ruto said. 'ODM will either form the next government or be a

part of the next government. What I will not accept, in honour of Odinga, is people playing with ODM to make it an alienated opposition party.' The early signs are that Odinga's allies do not want to rock the boat either. Elder brother **Oburu Oginga**, the senator for Siaya County, has been appointed interim leader while the party selects a successor.

The appointment of 82-year-old Oginga is a nod towards continuity – but also to the generational divisions within ODM. Apart from Homa Bay Governor **Gladys Wanga** and Mining and Blue Economy Cabinet Secretary **Hassan Joho**, most of the establishment ODM leaders who want to remain part of the Ruto government are of pensionable age.

DRIVERLESS VEHICLE

Formed in 2005, ODM is comfortably the oldest of Kenya's main political parties. Despite being born out of the campaign for constitutional reform, and nominally leftist – a nod to Odinga's East German education and early career – it was scarcely ideological. It was widely seen as Odinga's personal vehicle and, like its leader, struggled for presence and support outside Western Kenya, the Coast and Nairobi. Kenyan parties – even former President **Daniel arap Moi's** Kenya African National Union – have collapsed once their leader is gone. Without Odinga, there could be pressure to fold ODM into Ruto's *Kenya Kwanza* coalition.

That notion was given short shrift by Siaya Governor **James Orengo**, a long-time Odinga ally, who used his own eulogy

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Jihadists tighten stranglehold

With gold mines already under threat, the militants are now targeting critical commercial axes

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3rd Floor, 45 Albemarle Street
London, W1S 4JL, UK
Tel: +44 20 7831 3511

Editor: Patrick Smith
Deputy Editor: Andrew Weir
Website Editor: Juliet Amisshah
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at a burial ceremony at Jaramogi Oginga Odinga University of Technology in Siaya to warn against Odinga's death being used as a pretext to return to one-party politics.

'Political parties are the foundations of democracy. Any arrangement we go into should not be ones that kill political parties,' said Orengo. He and Kisumu Governor **Peter Anyang' Nyong'o** – both pre-eminent elders of the party – will be important voices in the succession. But Orengo and Nyong'o are 74 and 80 respectively, and neither is in robust health.

Odinga's final and best chance of winning the presidency was universally seen as being in 2022 – but he never ruled out another run. Having lost the election to become chair of the African Union Commission in February this year, he deliberately left himself room for manoeuvre ahead of August 2027, stating that ODM would run a slate of candidates but without committing to a presidential nominee. An ODM Central Committee meeting in July – called to address divisions between Mining and Cooperatives Cabinet Secretaries Hassan Joho and **Wycliffe Oparanya**, both former deputy party leaders, and ODM Secretary-General **Edwin Sifuna** – concluded that it would field candidates in the parliamentary, gubernatorial and county elections, but did not mention the presidency

(**AC Vol 66 No 16**).

The battle over Odinga's intentions will go a long way towards determining ODM's future. Wanga – a potential leadership candidate who has been suggested as a possible running mate for Ruto in 2027 – says that, in his final days, Odinga committed to staying the course with Ruto.

'He said he made a clear decision to walk with you for the stability and unity of the nation inside the broad-based government, that is the last instruction standing, and as a party that is where we will stand,' she said on 18 October.

That has been refuted by Sifuna, who – along with Embakasi East MP **Babu Owino** – is among a group of prominent ODM officials who want the party to appeal to the Gen Z movement and other young Kenyans. Many of them felt that Odinga's decision to go in with Ruto, after the state's use of kidnapping, intimidation and extrajudicial killing to suppress the protests, badly tarnished his legacy as a pro-democracy campaigner during Moi's presidency.

They believe they can overturn the part of Ruto's electoral calculus that was predicated on a low turnout – with most of Kenya's under-40s, the bulk of whom want to move away from the country's ethnic and tribally driven politics, either being denied voting cards or declining to vote.

However, Sifuna's opponents within ODM have been demanding his resignation for months. Odinga's dominance and control meant that he could keep the factions from descending into open conflict (**Dispatches 28/7/25**). Without 'Baba', an ODM split cannot be ruled out.

CROSSROADS

Which direction to take is the main decision facing ODM leaders. Wanga, Joho – a former Governor of Mombasa – Oparanya, Treasury Cabinet Secretary **John Mbadi** and **Junet Mohamed**,

ODM's leader in the National Assembly, lead the pro-Ruto continuity faction. None of them has national appeal.

The vacuum also leaves a golden opportunity for the *Anyone But Ruto* group of leaders – including former Deputy President **Kalonzo Musyoka**, Ruto's former deputy **Rigathi Gachagua** (impeached last year) and former Interior Cabinet Secretary **Fred Matiang'i**. Seizing the bulk of Odinga's support could easily propel one of them to the presidency.

Musyoka – Odinga's running mate in 2017 – is already positioning himself as the pre-eminent opposition leader, claiming Odinga's mantle. After the 2022 election, Musyoka stepped into the role as Odinga, whose health was already failing, took a post-election sabbatical.

'We never got to Canaan. There were indeed crocodiles across the River Jordan, as we used to say,' he said at the funeral. The Canaan reference – a metaphor for a fair, corruption-free and prosperous Kenya – was often used by Odinga on the campaign trail. Musyoka was confirmed as the presidential candidate for his Wiper Democratic Movement at a national delegates' convention in Nairobi on 10 October, which also agreed to rename the party as the Wiper Patriotic Front (WPF).

While Musyoka has long dominated the three Ukambani counties east of Nairobi – delivering over 80% of the region's vote to Odinga in 2017 and 2022 – he has never commanded cross-county appeal (**AC Vol 66 No 5**).

The main threat to Ruto in 2027 has probably not changed with Odinga's demise. None of the political establishment figures has the name recognition or appeal to oust him. But should Sifuna and younger ODM leaders seize control of the party, they could hasten Kenya's shift towards de-ethnicised politics – and upend the old order. ●

KENYA**Crisis in the capital****Unable to keep the streets clean, Johnson Sakaja is the latest victim of the Nairobi governor curse**

In a country where the power of incumbency is so strong, it is a striking anomaly that no Nairobi governor has secured a second term since devolution became reality in 2013. That pattern looks set to continue in 2027. Accusations of graft and poor

performance have dogged **Johnson Sakaja** ever since his surprise victory in August 2022, and he survived a planned impeachment motion in September only with the support of State House (**AC Vol 63 No 17**).

Kenya's capital has long been a city

of extremes – with some of Africa's wealthiest estates just a short walk from densely packed shanty towns. Though more than half of its 5.8 million inhabitants live in informal settlements, the lure of opportunity continues to draw rural Kenyans to the city. Nairobi's urban sprawl is rapidly expanding, particularly north towards Kiambu and east towards Machakos. The population has grown by 2m over the past decade and is projected to reach 10m by 2040.

Corruption and crime are long-standing vices which successive governors have promised – and failed – to tackle. But it is the failure by city

authorities to deliver basic amenities such as refuse collection, drainage clearing and decent roads that has prompted crisis talks between President **William Ruto**, the city's lawmakers and Sakaja – and raised the prospect of State House stepping in to take over powers from the local administration.

'Nairobi cannot continue to be the city in filth,' said Ruto during a church service on 12 October. 'We must make sure this city becomes clean, motorable, and a city in the light, not in darkness.'

Ruto said his administration was finalising an agreement with the private sector to address waste management and restore cleanliness in all city estates. Sakaja has insisted: 'There are no functions that are going to be transferred to the national government.'

SERVICE PROBLEM

Though Nairobi's chronic traffic jams have eased in recent years, largely thanks to new Chinese-built toll roads which criss-cross the city, its basic amenities have failed to keep pace with urban migration. So, too, has housing. Kenya has a housing deficit of 2m homes, according to the World Bank. The bulk of that is in Nairobi, and the Ruto government has fallen far short of its target of building 250,000 affordable homes per year – averaging instead around 50,000.

That could mean the return of the Nairobi Metropolitan Services (NMS), established in March 2020 by then President **Uhuru Kenyatta**. It took over key functions – including health, transport, public works and physical

planning – from the Nairobi City County Government after Sakaja's predecessor **Mike Sonko** became embroiled in impeachment proceedings and criminal investigations (**AC Vol 61 No 10**).

Sakaja says the NMS era, which lasted until he was elected to replace Sonko, was a 'disastrous' experience. Despite receiving substantial budget allocations from both the county and national governments, the NMS left behind 16 billion shillings (US\$120m) in unpaid bills in 2022, he says.

He maintains that talks with Ruto have instead focused on the national government providing financial support for waste-to-energy projects, recycling initiatives, and reallocating a portion of the rural electrification levy to maintain streetlights in the capital.

While few dispute that Sakaja's record in office has been poor, his swift fall from grace has also been the product of political factionalism. Back in 2022, Sakaja won on the ticket of Ruto's United Democratic Alliance (UDA) in a city where a sizable majority had voted for **Raila Odinga** in successive presidential elections. Leaders of Odinga's Orange Democratic Movement, which also holds most of Nairobi's parliamentary seats, view the governorship as theirs to reclaim. But it was Odinga who came to Sakaja's aid in September, ordering ODM members in the Nairobi County Assembly not to pursue an impeachment petition. That support was partly driven by fears that former Deputy President **Rigathi Gachagua**, a bitter critic of Sakaja, was gaining ground in the capital (**Dispatches 30/4/25**).

Sakaja described Odinga – whose death last week could complicate his own future – as 'a guide and a source of inspiration'. The 40-year-old Sakaja's standing among young Nairobians has also been damaged by his response to the Gen Z youth protest movement. His office is widely believed to have hired goons during the initial wave of demonstrations in the capital last year, and there were reports – denied by Sakaja – that his security team again paid armed thugs to attack and intimidate protestors during Gen Z rallies in June and July (**AC Vol 66 No 13 & Vol 65 No 16**).

The governor's main opposition lies among his own UDA assembly members, who have filed corruption claims against him and led the petition for impeachment – accusing Sakaja of misusing the Ward Development Fund, which is meant to finance projects across the county. That petition was suspended, not withdrawn.

The race to replace him is already gathering pace. On 12 October, **Moses Kuria** – the rabble-rousing former Cabinet Secretary for Public Services and advisor to Ruto – announced his plans to run for governor in 2027.

ODM's **Babu Owino** – another rabble rouser – Nairobi Senator and party secretary-general **Edwin Sifuna**, and **Dennis Waweru** (defeated by Sonko in 2017) have also been touted as potential candidates. All three belong to the anti-Ruto faction within ODM. They want to align the party with the aims of the Gen Z movement and claim that opinion polling puts them well ahead of Sakaja. ●

MADAGASCAR

Gen Z redraws the power map

Mass demonstrations prompted President Andry Rajoelina's removal from power. Now the military is back in the driving seat

It was the military's backing for the Gen Z protests against President **Andry Rajoelina** that forced him to flee aboard a French military jet on 12 October. At his inauguration as interim president on five days later, Colonel **Michael Randrianirina** acknowledged the bravery of the Gen Z protestors who had taken to the streets at the end of September calling for Rajoelina's removal (**Dispatches 20/10/25 & 6/10/25**). Now the movement's biggest concern is whether the new government will address their calls for fundamental reform.

Rajoelina's blend of brutality and political ineptitude sealed his fate.

When Gen Z dismissed his soft-soap invitations to dialogue as insincere, he opted to play hardball. From 25 September, squads of gendarmes fired teargas and rubber bullets to stop largely peaceful protestors gathering at the capital's historic sites of resistance – the Place du 13 Mai, commemorating the 1972 student uprising, and the nearby Place de la Démocratie, founded by Rajoelina during his 2009 putsch (**AC Vols 50 No 6 & Vol 52 No 19**).

After two weeks of stalemate and 22 deaths, the army stepped in on 12 October, ostensibly to protect protestors from state-inflicted violence.

The CAPSAT unit – the army's logistics and munitions corps – ordered security personnel to disobey orders from military superiors and return to barracks. This was a coded instruction to the gendarmerie to step aside. Col **Randrianirina**, CAPSAT commandant and former political prisoner (jailed in 2023 for allegedly plotting a coup), then led a huge and jubilant crowd into the Place du 13 Mai, sweeping past the gendarmes' hastily abandoned roadblocks. Rajoelina fled the country.

Behind this outwardly altruistic move lie opportunism and retribution. It was CAPSAT's intervention in 2009 that enabled Rajoelina to oust then President **Marc Ravalomanana**. But instead of rewarding the army, he favoured the internal security force – the gendarmerie. He appointed a retired gendarme, General **Richard Ravalomanana** (no relation), as President of the Senate, which approved increased funding, advanced hardware, and specialist United States and French riot-control

ANDRY RAJOELINA – OUSTED BY HIS FORMER PROMOTERS

President **Andry Rajoelina's** default political mode was always one of style over substance. Instead of addressing Madagascar's entrenched poverty, he sold a dream of glitzy modernity. But the hallmark projects of his Madagascar Emergence Plan proved irrelevant and vain: a superfluous motorway scything through a protected forest; a US\$75 million football stadium unfit to host internationals; and a \$175m urban cable car system that ordinary Malagasy cannot afford to use (**AC Vol 62 No 25**).

On 25 September, the youth took to the city streets. By 14 October – 19 days later – a **French** military aircraft had furtively exfiltrated Rajoelina to neighbouring La Réunion – a French overseas department. The next day, a transitional military directorate was declared and the president impeached. He is unlikely ever to return.

The young putschist of 2009, who rode to power on a confected wave of youthful fervour, heavily backed by France, was outmanoeuvred by the activists of the smartphone generation. Gen Z's calls to end persistent water and electricity outages – caused by the government's chronic mismanagement of the national company *Jiro sy Rano Malagasy* (Jirama) – were galvanised by fluid, leaderless organisation and agile digital communications.

Rajoelina's response was clumsy and confused. Dismissing his prime minister and cabinet – a self-exculpatory manoeuvre – left him unprotected by close political allies. His invitation to apply for ministerial posts via LinkedIn drew widespread derision. A patronising warning that youth were being manipulated by cyber-attacks from an unnamed foreign power (widely interpreted as **Russia**) prompted Gen Z to flood social media with ironic memes depicting themselves as cyborgs. ●

training for the elite gendarmerie units that fired on the Gen Z protestors.

Two days after CAPSAT's intervention, posed in front of a virtual background depicting the presidential crest, Rajoelina aired a feeble address to the nation from an undisclosed location. He claimed his absence was due to an attempt on his life, promised foreign allies would be flying in new electric generators, and announced the release of a dozen political prisoners.

With Rajoelina vainly trying to govern by laptop in absentia, the succession manoeuvres began. His desperate decree dissolving the National Assembly was rejected for lacking the presidential seal. Opposition leader, **Siteny Randrianasoloniaiko**, corralled deputies into a vote on Rajoelina's

impeachment, which was carried by 80% – the president's majority party IRMAR (*Isika Rehetra Miaraka amin'i Rajoelina* – We are all with Rajoelina), abandoning their leader en masse.

The nine-member High Constitutional Court (HCC), all Rajoelina appointees, approved the vote, upholding Randrianasoloniaiko's charges of constitutional abuse and dereliction. These included denial of fundamental rights and free speech, the disintegration of the gendarmerie's chain of command, and the president's passive abandonment of duty. In short, the court ruled there was 'a flagrant absence of state powers' necessary to guarantee the safety of the country, its institutions and its people.

With the president impeached,

executive power was due to pass to the president of the Senate, Gen Ravalomanana. As he had already been ousted, the constitution required that power be handed to the government. Since Rajoelina had only appointed the prime minister and four ministers since dissolving it a week earlier, it was deemed no viable government was in place. With all regular constitutional options exhausted, the HCC designated Randrianirina as interim head of state with a two-year transitional mandate.

The new government immediately announced the dissolution of five key democratic institutions: the HCC, the National Independent Electoral Commission, the Senate, the High Court of Human Rights and the High Court of Justice. The HCC, the AU and the UN have denounced this move as unconstitutional and illegitimate.

Randrianirina is moving fast. He has already appointed a senior jurist to work with the Mauritian Financial Crimes Commission in bringing charges of corruption, misappropriation of funds, fiscal and financial fraud, and international money laundering against **Maminiaina Ravatomanga** – the business magnate and former *éminence grise* behind President Rajoelina. Ravatomanga is being held in Mauritius for illegally landing his private jet as he fled with long-term associate and recently deposed Prime Minister **Christian Ntsay**.

The interim president is also pursuing his vendetta against the gendarmerie. When senior gendarmes arrived at CAPSAT headquarters to offer condolences for a soldier killed by one of their own, they were met with warning shots. Randrianirina signalled the new order by denying the gendarmerie a seat in the cabinet – a loss of power and status that is causing rifts within the internal security force. Gen Lylison **René de Rolland**, a former senator and

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longtime military operator, who arrived with CAPSAT on the defining day of the crisis, is now locked in a war of words with the notorious hardliner Col Faneva Onimihary Ralaiavy, who is riding a popular wave for his ruthless suppression of criminality in the lawless far west. While Lylison proposes collaboration with the army regime, Faneva is rallying his rural-based battalions to oppose the gendarmerie's 'dissolution'.

Having orchestrated the parliamentary rebellion against the president, Randrianasoloniaiko – now elected President of the National Assembly – is ostentatiously positioning himself on two popular tickets: restoring reliable water and electricity, and rejecting foreign mining interests. His announcement that a

US-owned mineral and rare earth project will be definitively abandoned is being dismissed as hot air by other powerbrokers seeking investment to finance Madagascar's economic recovery. Randrianasoloniaiko's unsophisticated but ambitious populism may yet prove his downfall.

PRIORITIES

The transitional regime faces three immediate priorities. First, it must restore the mismanaged national utility *Jiro sy Rano Malagasy* (Jirama) to avoid further protests. Second, it must retain international support: the African Union has suspended Madagascar for an unconstitutional power shift, and the Southern African Development Commission is undertaking a fact-

finding mission to Antananarivo. Third, it must ensure meaningful inclusion of non-political and non-military stakeholders in the transition – a demand likely to intensify from both domestic and international actors.

The group with most to lose is Gen Z. Their acephalous structure was a strength during the protests, but the embedded culture of rank and seniority that reigns in Madagascar's military and political spheres could easily marginalise young, leaderless neophytes. To achieve their aim of systemic overhaul – rather than just another change of regime – they will need to identify loyal allies and appoint robust representatives. Gen Z may find ardent protesting on the city streets far simpler than the treacherous politicking that now awaits them. ●

AFRICA ECONOMY/IMF/WORLD BANK

Debt shadows growth as Africa faces fiscal reckoning

Higher growth forecasts have to be set against falling per capita incomes, a monumental job creation challenge, and failure to agree on debt restructuring

As the International Monetary Fund and World Bank held their Annual Meetings from 13-18 October in Washington DC, persistent fears over global economic risks were tempered by relief that this year's United States tariff hikes – and China's response – have so far had less impact than expected. The IMF raised its global growth forecast for 2025 to 3.2% – up from April's 2.8% but still below last year's rate. The outlook remains clouded by worryingly high debt accumulation and debt servicing burdens, trade policy uncertainty, stretched asset prices and falling aid flows to low-income economies.

Both institutions upgraded their 2025 growth projections for sub-Saharan Africa (SSA): the IMF to 4.1%, the World Bank to 3.8%, with further improvement expected in 2026. Reforms and higher growth in Nigeria and Ethiopia are driving some of this momentum. The IMF lists Benin, Côte d'Ivoire, Ethiopia, Rwanda and Uganda among the world's fastest-growing economies. Nine more – including Guinea, Niger, Tanzania and Zimbabwe – are projected to achieve 6% GDP growth or more this year.

In North Africa, growth forecasts for Egypt, Morocco and Tunisia have been revised upwards. Egypt's inflation and debt levels have fallen, but the IMF urges further liberalisation to support its private sector.

The outlook for Africa's economies remains uneven – 24 countries saw

upgrades, while 20 had their growth forecasts cut. Larger economies such as South Africa and oil-rich Angola continue to lag, though they are not contracting. The IMF warns that without stronger growth, the per capita income gap between Africa's low-income economies and advanced economies will widen.

High population growth – while promising a demographic dividend – is eroding per capita gains. Using the World Bank's new US\$3-a-day poverty line, SSA's extreme poverty rate now stands at 50%, or around 650 million people. To raise living standards, the World Bank has launched its 'AgriConnect' initiative to boost agricultural investment and employment.

Nigeria, Congo-Kinshasa, Ethiopia, Tanzania and Sudan account for half of SSA's poorest. According to the World Bank, four of these – plus Uganda – may need 300m new jobs by mid-century, nearly half the region's total requirement. Conflict-hit countries such as the Central African Republic, Congo-Kinshasa and Somalia face the steepest proportional challenges. World Bank calculations show that a 1% rise in SSA GDP growth increases wage employment by just 0.04%, underscoring the region's reliance on informal, untaxed incomes.

Inflation has eased across most of the region, but remains in double digits in some countries, including Angola,

Nigeria, Zambia and Zimbabwe. Despite currency stabilisation and falling food and energy prices, high inflation in most of these countries is expected to persist into 2026. The IMF again flagged the growing sovereign-banking sector nexus: as more governments borrow heavily on domestic markets, banks are increasingly exposed to public debt.

While global borrowing costs remain high, reduced spreads on emerging and frontier market debt and a weaker US dollar have eased financing conditions compared with 2023, when international bond markets were largely closed to African sovereign borrowers. This year, the IMF has focused less on central bank financing of budget deficits, which follows moves by some African governments – including those attempting to curb inflation – to reduce reliance on such financing.

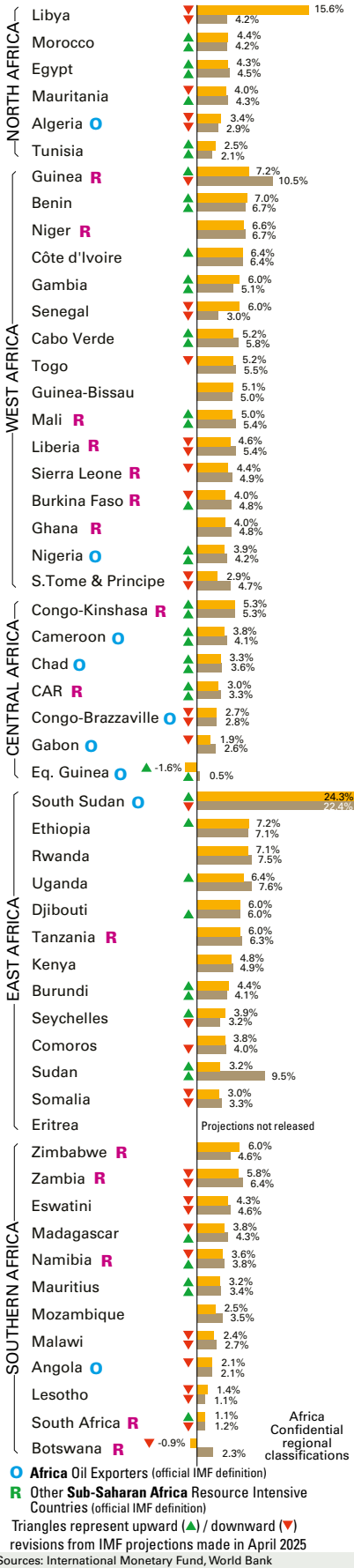
However, vulnerabilities remain. Several countries, including Senegal, South Africa, Ghana, Nigeria and Côte d'Ivoire, face hefty Eurobond redemptions in 2026-27. Rising gold reserves in some economies could be exposed to price reversals, threatening liquidity. Interest payments remain high despite fiscal consolidation and revenue-raising efforts. Some forecasts suggest, however, that many African economies could run primary surpluses – excluding interest payments – by 2026-27 and beyond.

The World Bank notes that domestic

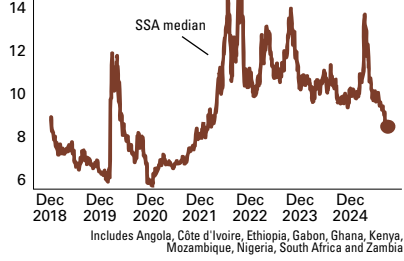
AFRICA: DEFICITS IMPROVING, BUT DEBT SERVICE STILL BITES

REAL GDP GROWTH % change on previous year

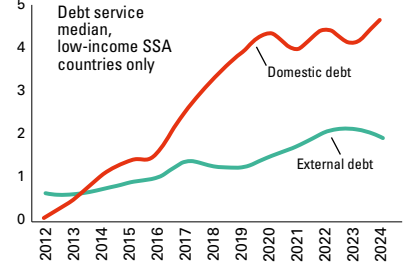
IMF October 2025 projections for: 2025 (orange), 2026 (grey)



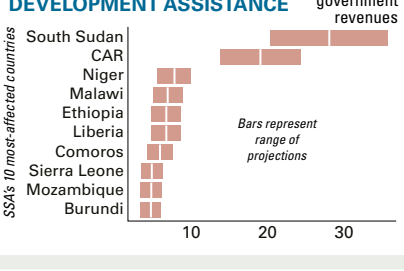
SOVEREIGN YIELDS %



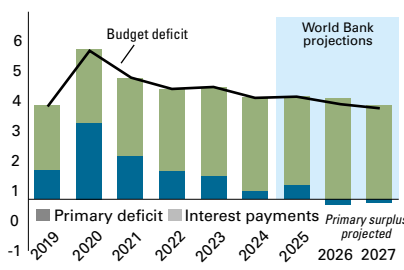
DEBT SERVICE % of GDP



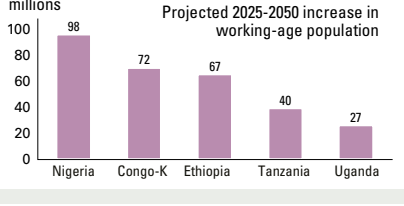
REDUCTIONS IN OFFICIAL DEVELOPMENT ASSISTANCE



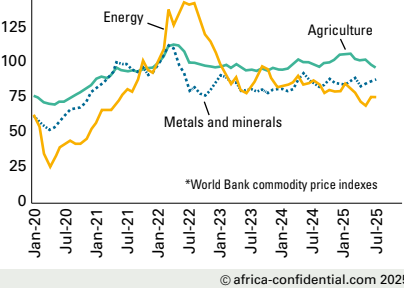
BUDGET AND PRIMARY DEFICITS SSA, % of GDP



LARGEST JOB CREATION NEEDS SSA



COMMODITY PRICES Index* 100 = Jan 2022



debt servicing now exceeds external debt payments in several countries – a result of deepening although still shallow local debt markets. Limited access to affordable external finance, which still carries foreign exchange risk, is also driving this increased reliance on domestic borrowing.

African governments are expected to push for further debt relief at next month's G20 meetings in South Africa. The Global Sovereign Debt Roundtable, which met in Washington DC on 15 October, concluded that low-income countries still face elevated debt service challenges, with high interest and costly refinancing crowding out spending on health, education and infrastructure.

Improving debt transparency is key. Last year's revelations of undisclosed public debt in Senegal – confirmed by the IMF this year – have largely been resolved, clearing the way for an IMF mission to Dakar to negotiate a programme under President Bassirou Diomaye Faye (AC Vol 66 No 13). IMF Managing Director Kristalina Georgieva praised the new government for exposing hidden liabilities inherited from the Macky Sall administration. Yet critics question why the Fund failed to flag these earlier. Contingent liabilities – especially from underperforming state-owned enterprises – remain a concern across several countries.

GLOBAL CURRENTS

IMF African Department Director Abebe Aemro Selassie argues that the impact of US tariffs on Africa has been less severe than expected, thanks to low direct exposure and exemptions for key minerals and crude oil. But countries such as Lesotho and Madagascar, which rely heavily on exports to the US, have been hit hard.

Another concern is the redirection of Chinese exports to Africa – a shift that could undermine local manufacturing and other value-added sectors (AC Vol 66 No 19). The expiry of the US African Growth and Opportunity Act (AGOA) in September – with no renewal yet – puts pressure on African exporters (Dispatches 14/7/25, AC Vol 66 No 16 & Dispatches 6/10/25). Selassie also forecasts a 16-28% drop in bilateral aid in 2025, with further cuts likely in 2026. In countries such as Niger, Central African Republic and South Sudan, these cuts could exceed 10% of domestic revenues.

These pressures underpin repeated IMF and World Bank calls for stronger domestic revenue mobilisation. The Bretton Woods institutions advocate improved tax administration, digitisation, fewer tax exemptions and other tax-generating measures, arguing that public consent is essential

– as shown by last year’s mass anti-tax protests in Kenya ([Dispatches 25/6/24](#) & [AC Vol 65 No 14](#)).

The region’s average tax-to-GDP

ratio remains below the 15% threshold the IMF sees as necessary for countries to enter a ‘virtuous circle’ of tax reform, citizen buy-in and improved economic

growth. Around a quarter of African economies collect 10% or less of GDP in taxes – a stark indicator of the challenge ahead. ●

MALI

Jihadists tighten their stranglehold

With critical gold mines in the Kayes region already under threat, the militants are now targeting critical commercial axes

After assaulting the main western trade corridor to Bamako from Dakar last month, jihadist fighters have now extended their campaign to the key southern artery from Abidjan as they seek to halt the flow of imported fuel that keeps the Malian economy alive. This follows the insurgents blockading Kayes, Mali’s western gateway, and Nioro du Sahel on the border with Mauritania, the base of the Chérif of Nioro, Bouyé Haïdara, an influential Sufi leader in Mali and much of Mauritania. They also staged attacks on convoys of fuel trucks in Kayes and this month they have set tanker trucks on fire close to the Ivorian border.

As consumers sit in long queues for the ever more expensive dribble of petrol and diesel that does still get through, President Assimi Goïta’s regime has reacted by accusing traders of speculation, stepping up its sovereigntist rhetoric and intensifying the crackdown on domestic critics. With Mali trapped in a security crisis for more than a decade, President Goïta’s repressive response has included detaining former prime ministers Choguel Maïga and Moussa Mara and ignoring court orders for the release of political prisoners. In addition, Mali, Burkina Faso and Niger have now withdrawn from the jurisdiction of the International Criminal Court, declaring that their *Alliance des États du Sahel* (AES) will set up its own human rights court.

Independence day on 22 September was celebrated in Bamako with a nighttime drone display that traced the silhouettes of junta leaders. But military bravura and authoritarian measures cannot alter realities on the ground. *Jama’at Nusrat ul-Islam wa al-Muslimin* (JNIM) militants have started to place a noose around the capital, torching tankers and raiding the gold and lithium mines that are Mali’s principal source of hard currency.

Despite the Wagner Group’s recent replacement with the Africa Corps – a paramilitary group answerable to Russian military intelligence and largely composed of former Wagner fighters –

Mali’s partnership with Russia, which has included arms deliveries, has not allowed the government to reassert control.

The junta’s 2023 decision to launch an offensive against a hitherto quiescent Tuareg separatist movement in the Saharan far north, in the name of ensuring territorial unity, has therefore turned out to be a major miscalculation. Even then the military was struggling to maintain its patchy presence in central areas and defend its eastern outpost Ménaka against Islamic State in the Greater Sahara. Now it is short of resources to meet the new jihadist challenge 1,600 kilometres away in the strategic Kayes region, which is bordered by Mauritania, Senegal and Guinea.

JNIM’s westward push is highly significant. After Bamako, Kayes is the second-largest regional economy with several major gold mines. Western areas produce 70–80% of gold exports. It is also a critical transport corridor, traversed by *Route Nationale 1* (RN1), the main road to the capital from the Senegalese border, which carries 30% of land imports. Since freight trains stopped running from Bamako to Dakar’s port, it has become even more critical, with Diboli border post processing almost 150 trucks a day.

The main road from Nouakchott port in Mauritania also runs through Kayes, crossing the frontier at Gogui before descending to Nioro du Sahel.

This means the blockade imposed since 3 September by the *Katibat Macina* arm of JNIM on Kayes and Nioro is already starting to bite. Combined with attacks on tankers – more than 20 were targeted from 13–14 September – it threatens to squeeze Bamako. It also put travellers at risk as buses operated by Diarra Transport, accused by militants of complicity with the regime, have been attacked.

Jihadists are also threatening action against supply routes through Côte d’Ivoire and Guinea. Already there has been an attack on a tanker on the road to Bamako from Sikasso, a key hub on the highway from Abidjan. In addition, there has been violence in the countryside around Kangaba, a historic town in the corridor between Bamako and Guinea, that has disrupted local trade.

Mali’s security crisis has been mostly confined to the north and centre of the country. The July 2022 JNIM raid on the military headquarters in Kati, outside Bamako, and the bloody assault on the capital’s gendarmerie training college and airport in September 2024, were warnings of the militants’ capacity to extend their reach. But the sustained jihadist offensive across the west of the past few months is unprecedented in its duration and scope.

The resulting constricted flow of goods to Bamako could have an impact on public attitudes towards the regime. Back in 2021, when the cost of essentials surged as a result of Economic



OPPOSITION DOWN BUT NOT OUT

The crisis in Kayes is occurring as the government tries to consolidate control, with President **Assimi Goïta** confirmed as head of state for a five more years, all political parties shut down and relentless repression of critics. But there are still signs of resistance.

Since 2023, the regime has jailed critics and security officials. Those figures have recently been joined behind bars by a member of an interim parliament, **Adama Ben Diarra**, who paid the price for saying it was time to end the military transition. **Issa Kaou N'Djim**, once a vocal Goïta backer, was taken into custody after doubting **Burkina Faso's** claim to have disrupted a coup plot late last year. Now the authorities have demonstrated that not even the highest-ranking civilian figures are safe.

Moussa Mara, briefly prime minister more than a decade ago and founder of the Yelema party, widely respected for his strong support in Bamako, had kept out of the limelight since the coups of 2020 and 2021. Yet after visiting detainees in July, he expressed his 'unwavering solidarity with prisoners of conscience'. This was too much for the regime and he was arrested on 1 August and charged with crimes including 'opposing the legitimate authority'. Then, on 12 August, came the arrest on corruption allegations of Goïta's first prime minister, **Choguel Kokalla Maïga**, who was sacked in November. He has complained of the 'clannish' conduct of state affairs. ●

Community of West African States (Ecowas) sanctions imposed in response to the coup, urban support for the junta ballooned amid resentment of what was perceived as foreign bullying.

But if the cost of living rises again, this time because of the new jihadist offensive, it will be tricky for the regime to deflect blame onto Ecowas or an 'imperialist' West. **French** troops and United Nations peacekeepers are long gone, at the behest of the junta itself, while coastal West African states such

as Senegal and **Ghana** have offered security assistance.

MINES UNDER ATTACK

Recent weeks have seen JNIM develop a second form of economic warfare with attacks on a mining sector that is a critical source of export and tax revenues. A Kodal Minerals lithium mine at Bougouni, south of Bamako, was attacked on 22 August and insurgents have raided several sites around Bafoulabé, which is around 150km

southeast of Kayes city.

The militants' push in the west poses a grave threat to major gold mines, such as Yatela, Sadiola and Loulo-Goukoto, the subject of a legal tussle between **Canada's** Barrick Gold and the government over tax and ownership. Several **Chinese** and **Indian** industrial projects have been attacked, with expatriate staff abducted. Jihadists have torched machinery being used by the China Overseas Engineering Group to repair the RN1. ●

NIGERIA

The Tinubu-Shell trade-off behind a \$7.5 billion investment

UN experts warn that international oil companies' opaque sales to local consortia flout environmental and human rights laws

The tortuous bargaining between international oil companies – Shell, TotalEnergies and ExxonMobil – and President **Bola Ahmed Tinubu's** government over new investments has hit a succession of legal and regulatory issues, mostly centred around responsibility for an environmental clean-up in the Niger Delta estimated to cost tens of billions of dollars.

The trade-off was that the IOCs would commit to hefty new investments, mainly in offshore oil and gas. In exchange, they would be allowed to sell their onshore assets in the Niger Delta to local consortia, able to manage the politics better and find ways to extract more oil from some of those ageing fields. But the responsibility for repairing the local ecology is still being contested.

In March 2025, Shell completed the US\$2.4 billion sale of Shell Petroleum Development Company (SPDC) to Renaissance Africa Energy Company, a consortium of Nigerian companies, formally ending its onshore presence in

the Niger Delta after seven decades of operation (**AC No 62 Vol 4**). Renaissance is a Nigerian-led consortium of four local oil companies – ND Western Limited, Aradel Holdings, FIRST Exploration & Petroleum Development Company and Walters Smith Group – along with the international Petrolin Group.

The transaction transferred SPDC's 30% stake in a joint venture with the Nigerian National Petroleum Corporation that holds 15 onshore oil mining leases and three shallow-water leases – assets plagued by oil spills that have devastated communities across the Delta region (**AC Vol 65 No 3**).

Shell provided Renaissance with loans of US\$2.5bn: \$1.2bn to finance the acquisition and \$1.3bn for future development, including 'specific decommissioning and restoration costs'. Renaissance will repay the loans from the revenue generated by the oil sales and marketing operations, most of which Shell is still managing. The precise terms of these loans

– repayment terms, interest rates, collateral arrangements and defaults – remain opaque although the assets are partly publicly owned in Nigeria.

These questions over the financing extend to whether Renaissance could pay independently for environmental clean-up operations that the Bayelsa State Oil and Environmental Commission and the UN Environmental Programme (UNEP) estimate will cost \$12bn (**AC Vol 64 No 11**).

The Shell-Renaissance transaction was structured as a share purchase rather than an asset sale – a critical legal distinction. SPDC continues to exist as a legal entity under new ownership, now renamed Renaissance Africa Energy Company. Under Nigerian law, this means Renaissance inherits all existing liabilities, including ongoing litigation and environmental remediation obligations. However, the Nigerian Upstream Petroleum Regulatory Commission (NUPRC) rejected the sale on 16 October 2024 because of

TOTALENERGIES' EXIT ROUTE BLOCKED

Questions of finance and contingent liabilities are further clouding the prospects of the attempted exit by TotalEnergies from Nigeria's onshore. In July 2024, it announced an \$860 million deal to sell its 10% stake in the Shell Petroleum Development Company joint venture to Chappal Energies, led by **Ufoma Joseph Immanuel**.

The transaction would have transferred TotalEnergies' interests in 18 oil assets operated by the Nigerian National Petroleum Corporation (NNPC) and Shell, producing about 14,000 barrels of oil equivalent per day. The deal received ministerial consent with a deadline of 90 days for Chappal Energies to make payment, but the Nigerian oil firm never fulfilled its obligation despite multiple extensions.

After nearly two years of negotiations, the Nigerian Upstream Petroleum Regulatory Commission (NUPRC) withdrew approval in September 2025. The regulator confirmed that both parties had missed required financial obligations, including 'funds tied to environmental liabilities'.

The deal's collapse embarrassed TotalEnergies, specifically its chief executive, **Patrick Pouyanné**, who had told shareholders that the Nigerian sale was one of three transactions expected to generate \$3.5 billion this year. Chappal is trying to renegotiate, arguing the assets are overpriced at \$860m and that last-minute clauses introduced by partners made financing impossible.

Reopening talks with Chappal looks unlikely to succeed. Instead, TotalEnergies has set its sights on three other Nigerian companies. The first is Renaissance which, despite the opaque terms of its acquisition of Shell's onshore assets, insists it is financially capable of taking on TotalEnergies' assets. TotalEnergies is also talking to South Atlantic Petroleum (Sapetro), one of Nigeria's biggest local operators, owned by the former defence minister General **Theophilus Danjuma**.

The third company in talks with TotalEnergies is AA Holdings, owned by **Austin Avuru**, a former chief executive of Seplat and current non-executive director of NNPC. Avuru also owns substantial interests in Platform Petroleum and Pillar Oil and is pushing negotiations through these firms. But, for now, none of the potential buyers seems willing to meet TotalEnergies' asking price of \$860m. ●

Renaissance's 'lack of financial and technical ability to manage the assets', according to concerns raised by the rating agency S&P Global.

Political insiders say that Abuja changed its position after conversations between President Tinubu and senior Shell executives about a trade-off: that Shell was prepared to invest heavily in new offshore oil production, to help the government meet its target of 2.5m barrels a day (b/d) by the next general election in 2027 (**AC Vol 66 No 1**).

The timeline made the trade-off clear. On 16 December 2024, Shell announced its final investment decision, committing to the \$5bn Bonga North project. Two days later, President Tinubu, who is also Nigeria's oil minister, overruled the NUPRC objections to Shell's sale of its onshore assets to Renaissance. In September this year, Shell invested another \$500m in Bonga North. This month, Shell announced a \$2bn investment in the HI offshore gas project, making an accumulated commitment to Nigeria of over \$7.5bn within a year.

But UN experts have sounded warnings on the opacity of this trade-off and the blurring of responsibilities for repairing environmental damage. On 31 August 2025, the UN Working Group on Business and Human Rights said it had sent requests to Shell, Eni, ExxonMobil and TotalEnergies in Nigeria to respond to complaints that the sales 'lacked transparency' and flouted environmental and human rights laws. So far only Eni has responded. The UN experts accused the companies of using 'Nigeria as an experiment for divestment without clean-up'. Under the

UN Guiding Principles on Business and Human Rights, companies are obliged to respect human rights, offer remedies to affected communities and prevent human rights abuses in dealings with third parties.

Legal challenges are mounting. The Lagos-based HEDA Resource Centre filed a suit challenging the transfer of the Shell assets on grounds of failing to comply with Nigerian law, including the absence of a required environmental impact study. In June 2025, the High Court in London ruled that Shell plc and its subsidiary in Nigeria can be held legally responsible for legacy oil pollution in Nigeria, establishing that the parent company could be held liable for failure to prevent environmental damage through adequate oversight.

MORE CLAIMS

London law firms such as Leigh Day, which has represented the Bille, Ogale and Bodo communities in class actions against oil companies for environmental despoliation, say these rulings are likely to prompt more community claims against the companies – whether it is Shell, the original owner of the asset, or Renaissance, the new owner (**AC Vol 64 No 4**). Currently, Shell faces two lawsuits in the British courts: one by the Ogale and Bille communities, alleging contamination of land and waterways, and another by the people of Bodo claiming clean-up costs of at least \$660 million.

Leigh Day doubts whether Shell's sale to Renaissance could absolve it of legal responsibility for the accumulated environmental damage. An activist in the Niger Delta warned of the risk that

Renaissance could face a substantial claim for environmental damage which would force it into bankruptcy: 'Would Renaissance then be the oil company equivalent of a "bad bank" taking responsibility for corporate misgovernance?' Such questions could be tested quite soon, should some of the communities in Bayelsa press their claims for environmental compensation.

The NUPRC insists it has instituted a 'safeguarded divestment framework' requiring buyers to secure decommissioning and abandonment obligations pre-sale, with over \$400m locked via letters of credit and escrow accounts to prevent stranded liabilities. It has approved decommissioning plans for 94 fields representing \$4.4bn in liabilities since April 2023. But the \$400m secured in the Renaissance deal falls far short of the liabilities and some of the claims being mooted. ●

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CÔTE D'IVOIRE

Repression shrouds Ouattara's procession

Published online 22 October

The president's strong economic record has been tarnished by corruption claims and a determination to quash dissent from any quarter

President Alassane Ouattara looks set to cruise to a fourth term at the polls on 25 October, with challengers weak or banned and his ruling party flush with cash and armed with suppressive tools. Instead of the election result, the outcome on Ivorian minds is what kind of country Ouattara will leave behind when he finally leaves office at the end of the decade given the apparatus of repression built during his rule (AC Vol 66 No 15).

One of the many advantages of incumbency is that the 83-year-old Ouattara and his ruling *Rassemblement des houphouëtistes pour la paix et la démocratie* (RHDP) are rolling in cash. A helicopter and private jet flew the President on his campaign trail and there is a huge fleet of gleaming coaches bedecked in party slogans to ferry the faithful to rallies. That included events in Daloa, the main city in the west and former base of former president Laurent Gbagbo, which RHDP hopes to win. A visit to Baulé traditional chiefs may well be enough to ensure that the country's central region also rallies to RHDP.

The funds come not just from domestic supporters but also from foreign businesses, including Asian mining companies. They help pay for a slick PR campaign. The re-election slogan for Ouattara – 'ADO for a great Nation' – is the brainchild of Voodoo Group, founded by one of the presidential family's friends, **Fabrice Sawegnon**. He refers to **Dominique Ouattara** as 'the artistic director' of the campaigns, even though the First Lady insists she is focused on charitable causes (see box).

None of the five other candidates has anything like these resources and support, and they are also divided and disorganised. Former First Lady **Simone Ehivet Gbagbo's** fledgling *Mouvement des générations capables* has struggled to get off the ground. **Henriette Lagou Adjoua**, a former Gbagbo minister, is campaigning on her own.

Jean-Louis Billon, a trade minister under Ouattara and the ex-CEO of Sifca, the country's largest agro-industrial conglomerate, was dumped by **Tidjane Thiam** from his *Parti démocratique de Côte d'Ivoire* (PDCI) for the same reason

that ex-president Laurent Gbagbo got rid of trusted lieutenant **Ahoua Don Mello** at the *Parti des peuples africains – Côte d'Ivoire* (PPA-CI) – they both suggested they be the alternative candidate should the leaders be banned, which duly happened.

Don Mello is the only remaining challenger and he has ditched the standard moderate opposition agenda. Instead, he wants Côte d'Ivoire to exit the CFA franc, join the China-led BRICS group and align his country with the Russia-sponsored Sahel juntas. Perhaps of note was that the luxury vehicles parked outside his campaign launch were indistinguishable from those used by RHDP bigwigs, *Africa Confidential* learned.

Despite all of this, the incumbent is taking no chances (AC Vol 66 No 19). The clearest indicator imaginable of the RHDP government's prevailing approach came on 25 October when spokesman **Amadou Coulibaly** announced that 'the repression' had begun. Supposedly in the interest of public order, protests planned for 4 and 11 October, organised respectively by the *Parti démocratique de Côte d'Ivoire* (PDCI) and the PPA-CI, were banned. At the attempted march on 11 October, security forces arrested 237 protestors as they quashed it. In September, there were also arrests of dozens of the same parties' cadres in Abidjan.

Particularly foreboding has been the institutionalisation of authoritarianism, with a central role for the *Conseil national de sécurité* (CNS), the body that banned the recent demonstrations. It was created by presidential decree in 2012 to fight terrorism, but in practice it has been a tool of domestic political control for the RHDP. In 2024, it dissolved several student bodies, including the notorious *Fédération étudiante et scolaire de Côte d'Ivoire*, whose former leaders include rebel leader **Guillaume Soro** and militia leader **Charles Blé Goudé**, a Gbagbo backer.

CNS Executive Secretary **Fidèle Sarassoro** is a vital cog in the RHDP machine. A close confidant of Defence Minister **Téné Birahima Ouattara**, the president's younger brother, Sarassoro worked for the United Nations in Congo-Kinshasa and was heavily involved in Côte d'Ivoire's disarmament, demobilisation and reintegration programme after the 2010-11 civil war. He was then a minister for presidential affairs before becoming Ouattara's chief of staff in 2017.

Given the security situation, it is unlikely the repressive apparatus will be dismantled after the polls. There are, after all, serious threats with three hostile junta-led Sahel states,

CHARITY, COCOA AND FAMILY BUSINESS

Weak opponents and an absence of investigative journalism has been helpful to the Ouattaras when it comes to pursuing one of their main goals the last five years in power – safeguarding the family's loot.

A good indicator of their focus and fortunes is the Children of Africa, the charity **Dominique Ouattara** has been running since 1997. Her eldest son **Loïc Folloroux**, one of the country's leading cocoa tycoons, sits on its board, as does **Elisabeth Gandon**, who took over from Dominique as the head of real estate empire, *Agence internationale de commercialisation immobilière* (AICI), the principal pillar of the family's business interests.

AICI, which Dominique established in 1979, managed former president **Félix Houphouët-Boigny's** assets in Côte d'Ivoire and France but also branched out into Gabon, where it provided the same service to late longtime leader **Omar Bongo Ondimba**. Gabon, on the brink of a mining bonanza, is looking attractive for the clan's attempts to diversify. France less so, with a judge asking awkward questions about why a family company appears to be warehousing capital in Paris on behalf of African heads of state.

A close relationship has grown up between the Franco-Ivorian Ouattara couple and their Guinean counterparts, President **Mamady Doumbouya** and his French wife **Lauriane Darboux**. Doumbouya's power is the result of a putsch that Ouattara would have condemned had it been Mali, Burkina Faso or Niger.

The two First Ladies visited the Dominique Ouattara Mother-Child Hospital in nearby Bingerville. Guinean media report that they have seen movements by AICI – but also Ivorian banks and transport companies – into Guinea, which is expecting billions of dollars of revenues from the Simandou iron ore project.

As it happens, Guinea's 28 December election is as much of a shoo-in for Doumbouya – and for the same reasons – as this month's is for Ouattara. ●

overrun by jihadists and in various stages of disintegration. Then there is ex-Prime Minister Soro, one of the

banned rivals who resides in **Burkina Faso** and can cause trouble using his northern Ferkessédougou fiefdom as a

springboard. The CNS will remain in place – and it will continue to suppress dissent. ●

CAMEROON

To the victor the spoiled ballot

Published online 21 October

Issa Tchiroma Bakary has declared himself the presidential election winner but few doubt that Paul Biya will ultimately prevail through electoral fraud

Citizens of Cameroon's main conurbations are bracing themselves as unrest spreads in the wake of the efforts by President **Paul Biya** and his ruling *Rassemblement Démocratique du Peuple Camerounais* (RDPC) to publish forged return sheets from polling stations.

According to a source close to Elections Cameroon (ElecCam), the Biya-appointed electoral commission, Biya's fictional 'winning' percentage was set at 53.6% of the vote, allotting his rival **Issa Tchiroma Bakary** 35.1%, and then passed to the Constitutional Council, which will make the announcement.

Anticipating such moves, Tchiroma had already declared himself the winner of the 12 October poll based on polling station returns showing a strong lead in several voting districts. Supporters of his *Front pour le Salut National du Cameroun* (FSNC) party and civil society scrutineers gathered the tallies early in an attempt to forestall ruling party efforts to publish forged returns.

Videos of celebrating Tchiroma voters at the polling stations filled social media spaces. Tchiroma was also keen to pre-empt the pro-Biya Constitutional Council, which is certain to pronounce Biya victorious. Tchiroma declared victory from a secret location in the northern city of Garoua after his supporters had fought off police seeking to arrest him on polling day.

Tensions are rising amid popular anger at reports of ruling party officials orchestrating fraud in several districts. Riots have started in Douala, Garoua, Dschang, Bafoussam, Kousséri and Limbe by irate citizens trying and more violent protests are expected (see Box, Protestors burn symbols of authority).

A massive protest march towards the presidential palace at Etoudi is planned for Sunday, 26th October, we hear.

Unusually, the President's inner circle miscalculated the popular appetite for change. Having barred oppositionist **Maurice Kamto** from the race, the world's oldest serving leader appeared to assume victory was a foregone conclusion (**AC Vol 66 No 16**).

The failure to factor in the people's hunger for change or to overlook the opportunism of Tchiroma, one of two ministers who resigned from Biya's government three months before the election, could yet haunt Biya.

DISARRAY

Biya's camp ran a disjointed campaign plagued by internal rivalry. There was no central campaign manager as in previous endeavours. Cabinet Chief **Samuel Mvondo Ayolo**, a relative of Biya and **Jean Nkuete**, party Secretary General and former deputy prime minister jointly helped coordinate the campaign.

Presidential chief of staff **Ferdinand Ngoh Ngoh** had met many senior ruling party members in an effort to boost Biya's campaign but played a less prominent role than many had expected because he was believed to have angered some other Biya aides.

The campaign machine relegated Prime Minister **Joseph Dion Ngute**

to his Anglophone regions where he held rallies in Bamenda, Buea, Kumba promising yet again more economic development. He had been a key contender for campaign manager but couldn't succeed because of a rivalry with Ngoh Ngoh.

Biya sensed that a decentralised campaign reliant on ministers who had fallen out of favour with their communities was not succeeding, let alone capable of matching the spontaneous excitement and mammoth crowds Tchiroma was pulling. He then ordered Ngute to engage the masses in the generally Francophone south of the country.

Biya then tried to bring some lustre to the campaign by deciding to speak publicly in the Far North provincial capital of Maroua, the first place in Cameroon outside his home village Mvomeka and Yaoundé he has visited in seven years. His last trip to Maroua was during the 2018 election campaign.

But his fulsome promises to the people in Maroua on 7 October, just days after returning from a private trip to **Switzerland**, courted criticism and did not have the effect he intended (**AC Vol 66 No 20**).

People posed the obvious question; how could he be promising change now, after 43 years in office? Notably, he had failed to deliver a railway line promised

PROTESTORS BURN SYMBOLS OF AUTHORITY

When the gendarme units tried to arrest **Issa Tchiroma Bakary** on polling day in Garoua, the home town of first president, **Ahmadou Ahidjo**, thousands of supporters fought back, setting a water-cannon and a troop transport on fire. **Paul Biya**, we hear, then overruled a further attempt by **Paul Atanga Nji**, his zealous minister of territorial administration, to make another arrest attempt.

Protestors then overwhelmed the police officers while army soldiers stood by, apparently arguing there was nothing wrong with public displays of joy by a candidate and his supporters. The government has accordingly deployed additional troops from the West and Littoral regions in the Francophone south of the country.

Despite the riots and burnings of public buildings in half a dozen towns, police and the gendarmes have not opened fire on the crowds, restraint widely regarded as most unusual. No deaths or serious injuries have been reported. The regime is treading carefully.

In Dschang in the West region, rioters burnt down the office building of the *Rassemblement Démocratique du Peuple Camerounais* (RDPC), several city council vehicles, the court building where vote tally sheets were being certified – or rather rigged as the crowd believed – and the home of the rector of the University of Dschang, who had reportedly ordered election officials to change results in the ruling party's favour.

In Douala, a day after the poll too, protestors set fire to the Elections Cameroon (ElecCam) office. In Kousséri in the Far North, a heated standoff between anti-riot police and citizens suspicious that initial vote tallies were being fraudulently rewritten lasted for hours. ●

to the region in 2018. The Far North's voters were thought easy prey for Biya's circle in the past and are an important constituency for him.

INSIDER

Biya has always managed to sweep away anyone claiming victory over him at the polls, but he faces a different challenge today. Tchiroma is a regime insider, having served for two decades in the government, often acting as its mouthpiece defending its various fiascos and brutal actions.

For that it is assumed other regime insiders may support him. And he can also count on deep support from the impoverished northern regions whose

youth and elite had started signalling the end of their friendship with Biya's government earlier this year.

Deploying brute force against Tchiroma would be risky. Some of the polling tallies published by his supporters and civil society activists show massive support for him in polling stations close to army barracks. His promise to end the deadly Anglophone conflict within six months was highly appealing to both sides of the language divide.

It is not guaranteed that the army, which boasts large number of recruits from the northern parts, can be trusted to carry out repressive policies unquestioningly, as it has in the past. Military spokespeople have been at

pains to state that they are at liberty to ignore 'illegal' orders.

The Constitutional Council has received 11 petitions disputing various aspects of the election. Interestingly, neither Biya nor Tchiroma is challenging the result. This council has a well-known tradition of backing Biya.

Cameroonians are planning anti-Biya protests. The President's options are split between cancelling the poll or parts of it to buy time or taking the hardline route to declare his victory outright and contain any angry outbursts. But unless Tchiroma is brought under control by an arrest and transfer to Yaoundé, away from his northern base, this approach could easily backfire. ●

KENYA

Opposition colossus Odinga dies, leaving succession crisis

Published online 16 October

Millions mourn a man who lost five presidential elections but changed the country, campaigning for political freedoms and constitutional reform

Raila Amolo Odinga, whose activism helped launch multi-party politics in Kenya and reformed the constitution after winning a national referendum, died on 15 October following a heart attack in Kerala, **India**. With the political class in flux, Odinga's exit will shake up both the government and opposition parties. It also marks a coda for one of Kenya's political dynasties. The son of the country's first Vice-President, **Jaramogi Oginga Odinga**, Raila Odinga emerged as leading campaigner for political pluralism and against the authoritarian rule of **Daniel arap Moi**.

Arguing that Odinga became skilled at mixing 'idealism and brutal pragmatism,' Kenyan political economist **Ken Opalo** described him as 'the de facto leader of the conscientious and reformist wing of mainstream politics... but he was very much an establishment politician open to dabbling in transactional "handshake" politics with reactionary forces...'

More than any other Kenyan politician, Odinga built an enduring following across broad swathes of the society – from poor farmers and urban workers to students and rights activists. Many argued that he was cheated of victory in his presidential campaigns. All of which added to his kudos as the outsider trying to change patronage politics (**AC Vol 66 No 6**).

A bitter rival to incumbent President **William Samoei Ruto** in the wake of the disputed 2022 elections, Odinga reached

a rapprochement with him last year which has insulated the government from the mainstream opposition, but not from a younger generation of activists on the streets who reject the country's old political class. Ruto will be the biggest political loser from Raila's demise which will trigger a reorganisation of opposition forces in the country (**AC Vol 65 No 18**).

Born on 7 January 1945, at Maseno in Kisumu, Odinga attended primary and high school in Bondo after which his father sent him to East Germany in 1965 where he took a degree in mechanical engineering. That choice of country led to the Odinga family being characterised as leftist, compared with the pro-west positions of the Kenyatta family and **Tom Mboya**, a rival to Jaramogi Odinga and also from Luoland.

Using his technical skills, Odinga founded East African Spectre, a company which manufactured gas cylinders, securing over a fifth of the national market in Kenya. From a wealthy family, Odinga used business to pay for his politics, instead of vice-versa, a more usual pattern in the country.

By the beginning of the 1980s, Odinga was clashing with Moi's government. He was detained without charge for six years, having been anecdotally linked to a failed coup by air force officers in 1982. Subject to periodic arrests and detention after he was released in 1988 and stepped up the campaign to end the single party system, Odinga went into exile in **Norway** in 1991.

Starting in 1997 in the Moi era, Odinga fought five presidential elections. He was unsuccessful each time. But it is widely accepted that Odinga, not **Mwai Kibaki**, won the 2007 elections. Its disputed results triggered clashes killing over 1,200 people and chasing 350,000 from their homes. Ruto, who had allied with Odinga's campaign, and **Uhuru Kenyatta**, with Kibaki, were charged with crimes against humanity by the International Criminal Court. But both the cases failed. After UN Secretary-General **Kofi Annan** mediated in the crisis, Odinga agreed a power-sharing deal with Kibaki and became prime minister.

'NEARLY MAN'

Part of Odinga's legacy is as the great 'nearly man'. After narrow defeats to Uhuru Kenyatta in 2012 and 2017, his best chance of winning the presidency arrived in 2022. With the backing of Kenyatta and the bulk of the political and business establishment, he lost a bitterly contested election against Ruto, Kenyatta's former deputy, by less than 1%.

By the early 2000s, a personality cult had developed around Odinga in Western Kenya but also in the toughest areas of Nairobi and Mombasa. He was affectionately known as 'Baba' to his supporters and was able to mobilise thousands on to the streets in the capital, on the coast and in his home base of Kisumu. He was both feared and loathed by many in the business and

political elite, especially in Mount Kenya where the Kenyatta family once reigned supreme. Just as Odinga had challenged and then allied with Uhuru Kenyatta, his father Jaramogi had a similarly uneven relationship with founding president and conservative nationalist, **Jomo Kenyatta**.

As prime minister under Kibaki, the high point of Raila's stint in government was his campaign for a new constitution, one of the continent's most progressive, in 2011. It devolved substantial powers on education, healthcare and public works from the centre to 47 counties, as well as strengthening the independence of the judiciary and boosting citizens' rights. Testing the judiciary's new powers, the Supreme Court rejected the August 2017 presidential election results and ordered a rerun. But Odinga boycotted the rerun, claiming further malpractice by Uhuru Kenyatta, and held his own, unofficial, inauguration ceremony in the centre of Nairobi.

After months of running protests, Kenyatta agreed a handshake with Raila, launching another power-sharing arrangement. They drew up the Building Bridges Initiative (BBI), to address the 'winner takes all' culture of Kenyan politics which had fuelled ethnic grievances, particularly in Raila's main voter bases in the western and coast regions.

But he failed to generate similar support for BBI, mainly because it looked like a ruse to carve up power

between Kenyatta's Kikuyu and Raila's Luo communities. The BBI collapsed after being ruled unconstitutional by the Supreme Court. The lasting achievement of the 'handshake' was to make Odinga, distrusted for so long by the Mount Kenya elite, into an establishment politician (**AC Vol 66 No 19**).

This new status survived in the wake of last July's Generation Z protests which stormed parliament and panicked President Ruto into sacking his cabinet. It was Odinga who propped up Ruto by bring five of his officials into cabinet jobs as part of another unofficial 'unity' government. This move, amid sustained campaign violence and intimidation by the police and intelligence services against Gen Z activists, hugely damaged his reputation among younger Kenyans.

By then Odinga's Orange Democratic Movement (ODM), launched in 2005, had become a mainstay of Kenya's political landscape where so many political parties struggle to survive more than a single election campaign. Most parties are little more than personal vehicles for their leaders. ODM defines itself as leftist but Odinga was never heavy on ideology. He chuckled when journalists asked him whether he became a communist when studying in East Germany.

Now his death leaves the ODM facing an uncertain future. He failed to groom a successor and many of his closest allies, including Kisumu governor **Peter**

Anyang Nyong'o and Siaya's **James Orendo** are in poor health (**AC Vol 66 No 16**).

For Ruto, after opposing Odinga in the constitutional referendum and his 'handshake' with Kenyatta, politics without him could get much more complicated.

FACTIONS

ODM is bitterly divided over whether to support Ruto. A faction led by the party's General Secretary **Edwin Sifuna** wants to harness the support built by the Gen Z movement (**Dispatches 28/7/25**). ODM's bigwigs, such as Treasury and Mining cabinet secretaries **John Mbadi** and **Hassan Joho**, want to stay in government and give Ruto a second term in August 2027, then ride on his coat tails.

Just hours after Odinga's death was announced on 15 October, Ruto described him as 'Kenya's foremost statesman and one of Africa's greatest sons,' and as a 'once in a generation leader.' He declared seven days of national mourning with flags flying at half-mast and announced a state funeral with full honours for his erstwhile opponent.

Later in the day, crowds were gathering in Odinga's western fiefdom of Kisumu as well as Kibera, the Nairobi shanty town, Africa's largest slum, which he represented as an MP for more than two decades. The ability to mobilise supporters in the streets remains in Odinga's power, even after death. ●

TANZANIA

Terror sets the tone for polling day

Published online 17 October

Security men guided by the President's son are said to be behind the abductions and killings creating a climate of fear for the elections

President **Samia Suluhu Hassan's** calm, maternal image conceals a streak of ruthless determination to root out all political opposition to ensure her re-election, no matter what the human cost, say oppositionists and human rights activists in the wake of the shock abduction of a *Chama Cha Mapinduzi* grandee, **Humphrey Polepole** (**Dispatches 13/10/25**). Some reports say he was murdered.

Fingers are pointing at the President's son, **Abdul Halim Hafidh Ameir**, and his influence over the Tanzanian Intelligence and Security Service, which has a long reputation for violence against oppositionists and alleged terrorists (**AC Vol 59 No 7**). The general election is on 29 October.

The security and intelligence apparatus has been kidnapping, torturing and killing citizens who dare to challenge and criticise the President and her government, with no regard to rank, say Dar es Salaam sources (**Dispatches 27/5/25**).

Polepole, the latest alleged victim, who came out as a critic of President Hassan and disappeared on 6 October, was formerly Secretary for Ideology in the CCM and a loyalist of Hassan's predecessor, President **John Pombe 'Bulldozer' Magufuli** (**AC Vol 62 No 6**).

Polepole resigned as ambassador to **Cuba** on 6 September claiming Abdul was running a special unit within the TISS for suppressing the opposition called *Watu Wasiojulikana* ('Unknown

Assailants' – see box). Three days before he disappeared he warned in a video on YouTube and Instagram, 'If anything happens to me, know that it was the government'.

On the night of his disappearance, neighbours in Ununio, an affluent suburb of Dar es Salaam, reported hearing screams from Polepole's residence. Surveillance footage from nearby homes showed armed men in tactical gear storming his compound. Footage of the aftermath on Instagram showed a trail of blood leading from a bedroom to outside the compound gate.

The police initially denied any knowledge of the incident but later issued a brief statement saying they were 'investigating'.

Polepole's younger brother **Godfrey** told journalists that the family had 'no doubt' the police were involved. 'This was not a robbery. They came for him,' he said.

For months, whispers of a state-sponsored terror network have circulated in political circles, civil society forums, and social media groups.

SCION OF THE REPRESSIVE TIMES

A month before his alleged abduction on 6 October, former Ambassador **Humphrey Polepole** claimed President **Samia Suluhu Hassan's** youngest son, **Abdul Halim Hafidh Ameir**, was serving as a shadow intelligence chief working alongside **Suleiman Abubakar Mombo**, the man the President appointed Director-General of the Tanzania Intelligence and Security Service (TISS) on 11 July 2024. The accusation against the hitherto low-profile son of the head of state may have sealed his fate, sources say.

Polepole accused Abdul of directing the *Watu Wasiojulikana* ('Unknown Assailants') unit that has been linked to the violence against opposition figures and was organising 'systematic electoral manipulation'. Polepole said he knew some members of the unit and asked why senior officers in the TISS had remained silent on its operations.

Unlike his sister **Wanu**, who is an elected member of the Zanzibar House of Representatives, Abdul has no elected or government position, but he has represented his mother on missions in the region.

In August 2023, Abdul led a delegation to **Uganda** to meet President **Yoweri Museveni** to discuss energy cooperation, although many suspect security cooperation over the countries' respective oppositions was probably also on the agenda, given the later detention and maltreatment of Ugandan oppositionists in Tanzania.

Wanu's husband, **Mohamed Mchengerwa**, is also part of the State House security leadership. He was the minister responsible for TISS at the time of President Hassan's succession. In 2023 the law was changed, transferring constitutional responsibility for TISS from the Public Service Ministry to the President. He is currently responsible for local government in State House, a key role at election time.

In June 2024, **United States**-based Tanzanian activist **Mange Kimambi** accused Abdul of identifying businesses and individuals who are owed money by previous administrations whom he then encourages to sue for their debt. When the government pays up he claims a fee of 15% or more of the recovered sum, she said ([AC Vol 59 No 7](#)).

Africa Confidential asked State House to respond to the allegations about the scheme and Abdul's role but had received no response by the time this article was published.

Kimambi's biggest claim relates to the Dege Eco Village, a US\$650 million housing project mainly funded by the National Social Security Fund with Azimio Housing Estates Ltd. as a minority participant in 2014. *Africa Confidential* extensively reported the claims of corruption and fraud around the scheme in 2017 ([AC Vol 58 No 4](#)).

The NSSF admitted early on that its contract with Azimio was 'fraudulently entered' into. In 2023 NSSF said it had found a buyer for the project as it stood. But no buyer was announced or has been heard of since.

Despite this, according to Kimambi, the businessman behind Azimio received \$400m in settlement of the government's claimed debt to him, Kimambi claiming Abdul took 15% of that. She adds that Abdul has identified government creditors dating back to the presidencies of **Benjamin Mkapa** and **Jakaya Kikwete** and has encouraged them to make claims.

Arusha Regional Commissioner and notorious regime hard-man **Paul Makonda** has accused some ministers in President Hassan's cabinet of colluding with Kimambi to tarnish the president's image, but this may be an opportunistic attempt to gain advantage by besmirching other Hassan loyalists.

Abdul's senior role in TISS suggests he and Mchengerwa and his mother work in close co-operation on the agency's activities and so are personally responsible for directing the repressive strategy.

Unlike many other national agencies TISS has both a foreign and domestic ambit. The 2023 amendments also expanded TISS's operational portfolio to providing personal protection for national leaders and foreign dignitaries, and protecting vital installations. TISS is the central intelligence hub and works alongside but separately from the Tanzania National Police Force, led by Inspector-General **Camillus Wambura**, and the Tanzania People's Defence Force (TPDF), commanded by General **Jacob Mkunda**. TISS also participates in the District Security Committees, which coordinate intelligence collection and analysis at local levels to pick up signs of discontent at grass-roots level.

Security insiders and rights observers suggest that TISS, that once 'disappeared' jihadists in the coastal and southern regions, is using the same architecture to pursue the opposition ([AC Vol 61 No 22](#)).

Either way, the evidence points to a president who protects the system she inherited. She is not powerless, yet not opposed to its methods. Tanzania's 'hard men' may still hold the night. But Hassan, the critics say, keeps the lights dim. ●

Witnesses and families of the abducted describe the perpetrators as heavily armed men, often masked, arriving in convoys of government-issued Toyota Land Cruiser Hardtops, the standard vehicle of the security organs. They use military-grade firearms and police handcuffs and operate with a level of confidence that suggests official protection.

Polepole's dramatic turn against the government and his disappearance captured the public imagination after his resignation statement accused the government of 'oppression, deceit, and moral decay.'

Polepole declared that he could not 'serve under a government that has turned against its people'. He accused the state of being 'captured by hooligans'

and warned that Tanzania was drifting into an era of fear and impunity.

Polepole's disappearance followed a chilling prelude. On 17 July, four days after his resignation, his sister **Christina Polepole**, 52, was abducted from her home in Bahari Beach by armed men who scaled her fence and broke through her door. She was beaten, blindfolded, and driven away in one of the familiar white Land Cruisers.

After news of her abduction spread on social media, the kidnappers released her near her home hours later. She had severe head injuries.

A group of prominent lawyers led by **Peter Kibatala** has since filed a habeas corpus petition demanding that the state produce Humphrey Polepole 'dead or alive'. At that hearing Christina

identified the Dar es Salaam Deputy Head of the Crimes Division, **George Bagyemu**, as the leader of her abductors.

A FAMILIAR PATTERN

Polepole's disappearance is only the latest in a series of abductions, killings and torture incidents against oppositionists.

After an early liberal dawn, analysts noted the President's quick return to policies similar to those of her predecessor, some claiming she has deliberately cultivated a gentle image the better to conceal the harshness of her approach to civil and political rights ([AC Vol 66 No 1](#) & [Vol 64 No 6](#)).

Some view Hassan as a hostage of the old guard: the generals, spies, and party enforcers who never forgave her

softer tone. Others say she became an enthusiast for repression after she was warned only ruthless measures could guarantee victory in the next election.

Amid official silence on the abductions, Zanzibar's Vice-President **Othman Masoud Othman** is virtually alone among public figures to condemn what he calls 'acts that shame our republic'. Several religious leaders have echoed his concern.

The repression evokes memories of the policies of President Magufuli

era, when critics, journalists, and opposition figures were harassed, jailed, or disappeared. Several of the same security chiefs from that period remain in office today.

The latest events have rattled donors. 'There's growing unease in Western embassies,' one European envoy told *Africa Confidential*. 'Samia promised openness and reform, but what we're seeing looks more like continuity of repression.'

In September 2024 western

diplomats jointly protested at the abduction, torture and killing of **Ally Kibao**, a senior Chadema official. Although President Hassan then promised an investigation, she also warned 'outsiders' to stay out of her country's affairs.

Many Tanzanians view the disappearance of as prominent as man as Polepole as a clear warning to other regime insiders not to break ranks, as well as a strong signal to humbler citizens. ●

DISPATCHES

KENYA

Odinga's grand send-off marred by deaths

20 October

Heavy-handed approach to policing state funeral may increase pressure on Ruto's coalition

Two mourners died in a stampede at **Raila Odinga's** state funeral on 17 October, a day after three were killed when police opened fire and used tear gas on crowds that gathered to view the opposition leader's body at Nairobi's Kasarani stadium ([AC Vol 66 No 21](#)).

A further 200 were injured during the funeral, according to Doctors Without Borders. Tens of thousands attended both events, with similar numbers at a gathering in Kisumu, the city on Lake Victoria that was the bedrock of Odinga's support for more than half a century. A private burial service took place on Sunday 19 October.

The country's most influential politician not to hold the presidency, Odinga was given a state funeral with military honours by his old foe turned ally President **William Ruto**, who delivered the main eulogy.

His death leaves a leadership vacuum and uncertainty about the future of the informal unity government with Ruto, which includes five cabinet members from Odinga's Orange Democratic Movement (ODM).

Elder brother **Oburu Oginga** has been appointed ODM interim leader and the direction the party chooses to take may well determine the next election. Ruto had been relying on Odinga's western and coastal support base delivering him a second term in elections in 2027.

The police's deadly handling of mourners, which follows the crackdown against youth activists involved in the

Gen Z movement, will be seen by many Kenyans as further proof of Ruto's creeping authoritarianism. That could encourage ODM's younger leaders, including **Babu Owino** and General Secretary **Edwin Sifuna**, to push for a break with the president ([Dispatches 28/7/25](#)).

EGYPT/EU

Sisi hopes for debt swap deals

20 October

Cairo is also seeking investment in green growth projects

President **Abdel Fattah el Sisi** is hoping to use a two-day bilateral summit with the European Union starting on 22 October to move closer to concluding a debt-swap deal with creditors before the end of 2025.

Sisi also wants to obtain more EU funding for green energy and infrastructure projects, but exchanging existing debt for lower cost alternatives is the most pressing ambition.

On the sidelines of the Annual Meetings of the International Monetary Fund and World Bank in Washington last week, Planning and International Cooperation Minister **Rania al Mashat** said that ministers want to convert a portion of Egypt's external debt into funding for green development projects, covering water management, renewable energy and climate adaptation.

The idea will be hard for the EU to oppose.

The EU-Egypt declaration of last March, which accompanied an agreement to provide €7.4 billion in grants and loans to Cairo for energy projects and migrant control, states that debt swaps 'could enhance the fiscal space needed for essential investment'.

Since then, a series of EU leaders,

including Italy's Prime Minister **Giorgia Meloni** and European Commission President **Ursula von der Leyen**, have expressed support for green debt swaps.

During a speech in Brussels earlier in October, **Ghana's** ex-president **Nana Akufo-Addo** had called for the EU to support 'a programme of 'Debt Relief for Green Investment and Resilience' ([Dispatches 6/10/25](#)). This idea of linking debt cancellation directly to investments in climate adaptation and sustainable growth is likely to be discussed at an EU-African Union summit in **Angola** next month.

At June's United Nations Financing for Development summit in Seville, hosts **Spain** and the World Bank launched a new Global Hub for Debt Swaps for Development, although as yet there are no targets for how much debt could be restructured in this way ([AC Vol 66 No 15](#)).

MADAGASCAR

Gen Z's military man Randrianirina takes the oath

20 October

Despite AU censure, new president may receive SADC backing

One of President Colonel **Michael Randrianirina's** first tasks is gaining international acceptance of his new regime after he took power in a Gen Z-inspired coup that followed weeks of protests.

Randrianirina, the head of Madagascar's elite Army Corps of Personnel and Administrative and Technical Services (known as CAPSAT) was sworn in as president by the High Constitutional Court on 17 October, seven days after he led the putsch that ousted **Andry Rajoelina**, who has since

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fled to France.

Demonstrations erupted after two councillors in the capital city Antananarivo were arrested over planned protests against water and electricity shortages that reflected longstanding grievances about substandard public services and elite corruption.

The day before Randrianirina was sworn into office the African Union condemned the coup and suspended Madagascar's membership of the organisation. The United Nations followed suit, stating that it was 'deeply concerned by the unconstitutional change of power'. 'The decision was expected,' said Randrianirina, adding that there would now be 'behind-the-scenes negotiations' with AU officials.

So far, the Southern African Development Community (SADC) – from which the AU is meant to take guidance on matters of regional constitutionality – has declined to rule on the legitimacy of the new regime.

Factors driving SADC's caution probably include that Randrianirina is popular in Madagascar but Rajoelina is widely loathed. In addition, the president of SADC member Zimbabwe, Emmerson Mnangagwa, himself came to power in 2017 via a coup d'état, while there is reluctance to side with an ally of the French government, whose military plane airlifted Rajoelina out of Antananarivo. Rajoelina was the fifth African leader close to France's President Emmanuel Macron to have been ousted since 2020.

While UN Secretary-General António Guterres has urged 'all the Malagasy stakeholders, including the youth, to work together to address the underlying causes of instability in the country,' Randrianirina is already positioned as an ally of Gen Z ([Dispatches 6/10/25](#)). He was jailed without trial for four months from

November 2023 on accusation of inciting a mutiny and planning a coup, but student groups – part of the 'Gen Z Madagascar' youth movement whose protests led to Rajoelina's departure – were among those who successfully campaigned for his release.

TANZANIA

Ahead of vote, Hassan's government ratchets up repression

13 October

Relatives of government critic Humphrey Polepole say the former ambassador has been abducted

Despite the absence of a major challenger to President Samia Suluhu Hassan, her government is taking no chances, banning coverage of an opposition leader's trial and stepping up repression ahead of the 29 October poll.

The family of Humphrey Polepole, Tanzania's former Ambassador to Cuba and now an outspoken government critic, reported his disappearance following a break in at his home in Dar es Salaam in the early hours of 6 October. Upon arrival, they found the door broken, electrical wires cut and a significant amount of blood.

Opposition leader Tundu Lissu's treason trial started on 6 October behind closed doors following a ruling by the court on a request by the state prosecutor, who said it was necessary to conceal the identities of their witnesses.

Lissu has been denied bail since April and his legal team and supporters – including Kenyan former cabinet minister Martha Karua and prominent activist Boniface Mwangi – have been prevented from visiting him, at times brutally ([Dispatches 27/5/25](#)).

Lissu was arrested shortly after being banned from standing against President Hassan. He and his Chadema party then launched a campaign urging Tanzanians to boycott the election without guarantees that it would be free and fair ([Dispatches 14/4/25](#)). That amounted to sedition and a threat to disrupt the elections, said the government.

Though Hassan will be one of 17 presidential hopefuls on the ballot paper, Luhaga Mpina, the candidate of the second largest opposition party ACT-Wazalendo, is not among them after the Attorney General upheld a ruling by the electoral commission that his party had not followed nomination procedures.

Salum Mwalimu, who defected

from Chadema earlier this year and is running for the fringe *Chama cha Ukombozi wa Umma* (Chaumma) party, is the only remaining challenger of note. Yet despite the lack of electoral threat, attacks on opposition activists and government critics have also become more frequent.

Hassan has faced little pushback from foreign governments. While the European Parliament passed a resolution condemning Lissu's treatment and that of opposition activists, the European Union's leadership has said little.

ERITREA/ETHIOPIA

Tensions worsen as Addis accuses Asmara of proxy war

13 October

Ethiopian Foreign Minister alleges Eritrea is working with a TPLF faction and Amhara rebels

A dangerous rift between Eritrea and Ethiopia is growing ever wider. In a 2 October letter to UN Secretary-General António Guterres, Ethiopia's Foreign Minister Gedion Timothewos accuses Eritrea of waging a proxy war via a faction of the Tigray People's Liberation Front (TPLF).

'The collusion between the Eritrean government and the TPLF has become more evident over the past few months,' stated Timothewos in the letter seen by *Africa Confidential*.

'In an alliance that they have dubbed "Tsimdo", the hardliner faction of the TPLF and the Eritrean government are actively preparing to wage war against Ethiopia,' he added.

Since the 2022 agreement that ended a two-year war in Tigray, the TPLF's leadership has split, with Ethiopian Prime Minister Abiy Ahmed aligning with one faction and Eritrean President Issayas Afewerki backing another ([AC Vol 66 No 19](#)).

Gedion says that Issayas is anxious to thwart Addis's aspirations of securing access to the Red Sea, a key foreign policy goal.

In the letter to Guterres, he accused Eritrea of 'funding, mobilizing, and directing armed groups such as Fano to expand the horizon of the conflict,' adding that the insurgent in Amhara region had recently launched an offensive on Woldiya, a major town ([AC Vol 66 No 15](#)).

'This furtive offensive was supported and instigated by the Eritrean government

and TPLF. In fact, TPLF commanders and fighters actively participated in the offensive,' he stated.

EU/AU

Africa on track to profit from EU's minerals interest

13 October

Brussels claims rail investment will help secure critical minerals and boost African producers

South Africa and the countries involved in the Angola–Congo–Kinshasa Lobito Corridor project were the main beneficiaries from the two-day Global Gateway Forum in Brussels last week.

Pretoria secured commitments

of €11.5 billion in its green energy, transport and health sectors via the European Union's Global Gateway, an infrastructure investment programme that aims to deliver up to €400bn.

Since a bilateral spring summit in South Africa, the EU has promised new energy investment and the prospect of better trade terms to Cyril Ramaphosa's government ([AC Vol 66 No 6](#)).

Meanwhile, the Lobito Corridor rail network was cited by EU Commission President Ursula von der Leyen on 9 October as 'one of the most ambitious' initiatives so far of the programme.

The commission wants to use the Lobito project, which it is co-financing with the United States, to increase its supply of critical minerals. Washington and Brussels have so far committed over US\$5bn to the rail network, which they say will also connect agriculture markets in Central and West Africa ([AC Vol 66 No 2](#)).

Officials in Brussels say that more

funding announcements relating to Lobito are likely during an EU-African Union summit in Luanda, Angola's capital, in November.

'It is about the critical raw materials that are so vital for our strategic industries. Not just for Europe's needs – but with local processing and added value,' said von der Leyen in her speech at the forum's launch.

Brussels hopes local processing would offset China's dominance of mineral refining, as well as give African producers the prospect of keeping a greater share of the value. That would counter African fears that the Lobito project is another means of extracting raw minerals out of the continent for value to be added elsewhere.

Congo-Kinshasa's government, one of the main potential beneficiaries from Lobito, is also hoping that the Global Gateway will lead to investment in a 'green corridor' to connect rural areas with the capital Kinshasa. ●

POINTERS

Nigeria

COUP PLOT OR NOT

■ Mobile phones started buzzing on 17 October about a thwarted coup plot, fired up by a story on *Sahara Reporters* on the arrest of 16 officers 'over issues of indiscipline' announced by Brigadier General **Tukur Gusau**, spokesman at Defence Headquarters, two weeks earlier. Gusau's statement had been as anodyne as possible, reporting the officers had grievances 'stem[ing] from perceived career stagnation caused by repeated failure in promotion examinations'.

Unconvinced, *Sahara Reporters* cited anonymous Defence Intelligence Agency sources who claimed the officers were plotting to overthrow President **Bola Ahmed Tinubu** during independence day celebrations on 1 October. It named a lieutenant colonel, recently returned from **China** and working in the office of National Security Advisor **Nuhu Ribadu**, as being the ringleader. The independence day celebrations were cancelled due to the discovery of the plot, it reported.

That triggered a swift denial from Lt Gen Gusau dismissing the report as 'entirely false' and 'intended to cause unnecessary tension'. He added the independence day parade was cancelled because Tinubu was attending 'a strategic bilateral meeting abroad'.

Speaking confidentially, some government officials were sceptical about Gusau's insistent denials but said they didn't expect much detail to come out when the military investigation panel reports next month.

Insiders say that President Tinubu takes security extremely seriously, to the point of obsession. A year ago, he reshuffled the high command to promote senior officers from his home region, the south-west. These include Army Chief of Staff **Femi Oluyede** and Commander of the Brigade of Guards, Brig Gen **Adebisi Onasanya (AC Vol 65 No 24)**. Both the Commanding Officer at State Armaments, House Major **TS Adeola**, and head of State House Military Intelligence Maj **Koyejo Hamzat** are Yoruba, from the south-west, as is the President's *aide de camp* and chief security officer.

EU/Africa/minerals

THE PRICE OF PROCESSING

■ Who will invest in local refining and processing of critical minerals was the question posed by African leaders at

MADAGASCAR: RANDRIANIRINA OUT OF THE SHADOWS

Colonel **Michael Randrianirina's** rapid rise from a senior military officer to the presidency of Madagascar owes much to luck and Gen Z. Randrianirina would not be president without the Generation Z protesters who took to the streets for more than a month, eventually forcing the impeachment of President **Andry Rajoelina**. At his swearing-in ceremony on 17 October, Randrianirina was quick to recognise the protesters' bravery publicly (**Dispatches 20/10/25**).

Despite riding in to Antananarivo on the back of an armoured car, leading a huge crowd of jubilant supporters to the Place du 13 Mai, Randrianirina, the head of Madagascar's elite Army Corps of Personnel and Administrative and Technical Services (known as CAPSAT), was a self-professed man 'of the shadows'.

Little is known about Randrianirina's backstory. He grew up on Madagascar's southern tip in Androy, one of the country's poorest regions, before doing his military training at the prestigious Antsirabe Military Academy. Stints in the army then dovetailed with early political roles. In 2016, he was appointed as Governor of his home region by President **Hery Rajaonarimampianina** and served until 2018, when Rajaonarimampianina was defeated by his predecessor Rajoelina in the presidential runoff election. He transitioned back to the military, serving as an infantry battalion commander in the southern port town of Toliara until July 2022. He was then appointed as head of CAPSAT.

But Randrianirina's big political break was his arrest by Rajoelina in November 2023 after being accused of inciting a mutiny and planning a coup. He was detained without trial for four months, though Randrianirina has said that most of that time was spent in a military hospital, and eventually left with a one-year suspended sentence for undermining state security. Significantly, it was student groups, together with opposition politicians and figures from civil society, who led the campaign for his release.

What happened when he left jail is also something of a grey area. Randrianirina said after his release that he had no command and was working 'in the shadows'. It is not clear when he resumed the command of CAPSAT.

For the moment, Randrianirina's mandate is as an interim head of state with a two-year transitional mandate, at the end of which fresh elections will be held. With his stint as Governor of Androy, he is no political novice, yet he remains a blank slate. Madagascar's recent history, as well as the aftermath of other recent military takeovers, suggests that the future will be far more complicated.

Rajoelina first rose to power in March 2009, riding the crest of a coup, but presided over chronic instability. Nominating Rajaonarimampianina to be his successor – who in 2013 won a bitterly contested election marred by claims of rigging – did little to change that (**AC Vol 55 No 2**). Rajoelina was brought down this year because he and the island's political elites were rotten and ignored public service delivery and voters until it was far too late.

It is not clear whether Randrianirina has long-term plans for the presidency. But if he gives Gen Z what they and millions of other Malagasy want by fixing water shortages, electricity blackouts and corruption, two years could be just the start. ●

the Global Gateway Forum hosted by the European Union earlier this month (**Dispatches 13/10/25**).

China controls roughly 85% of global rare earth processing, and EU officials see the Lobito Corridor rail network project connecting **Congo-Kinshasa** and **Zambia's** Copperbelt to **Angola's** Lobito port on the Atlantic Coast as a way to counter Beijing's dominance. African leaders are still anxious to ensure that the Lobito Corridor project and the EU's promises of investment in minerals and agricultural processing are kept. Otherwise, Lobito could simply be about faster extraction of raw materials.

'These investments should not replace one dependency with another,' said South African President **Cyril Ramaphosa** during the two-day meeting in Brussels.

'If you want our presence along the value chain, that means playing a critical role in the transformation of natural resources before they're being exported,' said **Thérèse Kayikwamba Wagner**, Congo-K's foreign minister.

Wagner's country produces over 70% of the world's cobalt but processes only a fraction, with China controlling over half of global cobalt refining.

The trouble Ramaphosa et al face is that neither the EU nor the US has companies with the capacity to do smelting and blending (**AC Vol 66 No 2**). Industry insiders say that they expect Brussels and Washington to offer a range of new subsidies to firms to process key metals. Without this capacity, there is little point obtaining improved minerals access since China will still dictate prices, they add.