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BLUE LINES

Few of the delegates arriving in Belém for the opening of the UN COP30 climate summit on 10 November expected a breakthrough on finance. Funding for global climate adaptation is running at less than 10% of the US$300 billion a year promised by wealthy countries by 2035, and little more than 2% of the $1.3 trillion demanded by developing states. But African diplomats who put 'green growth' at the centre of their pitch in Brazil expected to mobilise more capital.

Instead, the divisions between wealthy and developing countries have widened. Many African states support the Open Coalition on Compliance Carbon Markets drawn up by the hosts Brazil, which aim to develop shared principles for carbon pricing. But the EU's Carbon Border Adjustment Mechanism has been one of the most divisive topics. South Africa and Mozambique complain that CBAM – a levy on imports of products such as steel, aluminium and cement linked – is a unilateral measure restricting trade and hurting developing countries. The EU retorts that CBAM is part of its push towards 'net zero' emissions rather than a trade measure. Fuelling the divide is the fact that the EU wants the revenues from CBAM, forecast at around €9bn a year, to finance its budget. The Brazilian government has proposed that the cash be used to contribute to the climate finance that European and other wealthy states are being so slow to provide.

ETHIOPIA/ERITREA

The fight for the Red Sea escalates

Commercial interests, naval ambitions and shifting alliances are raising the risk of war – as regional states pick sides

Prime Minister **Abiy Ahmed** has repeatedly insisted that Ethiopia must secure direct access to the Red Sea. In his October address to parliament, he called it 'inevitable', citing legal, historic, geographic and economic grounds. He had raised the issue before becoming prime minister in 2018, and reminded MPs that he re-established Ethiopia's navy a year later. His arguments range from Ethiopia's status as the world's most populous landlocked country, the strategic risks of relying solely on **Djibouti**, to the economic cost – over US$1.6 billion annually in port fees and related expenses. Abiy said the 1993 agreement that granted Eritrea independence after a 30-year war should not have left Ethiopia landlocked – an anomaly that must now be rectified.

Abiy's initial call for port access did not centre on Assab. On a visit to Mogadishu, he spoke of developing four **Somali** ports. In January 2024, Ethiopia and Somaliland signed a Memorandum of Understanding, interpreted by Somaliland as offering recognition of its territorial sovereignty in exchange for full use of Berbera and a naval base nearby (AC Vol 64 No 23, Vol 65 Nos 2 & 24). Negative reactions extended beyond Somalia. The MoU has not been implemented and is unlikely to be, though President **Abdirahman Mohamed Abdullahi 'Irro'** made an official visit to Addis Ababa last month. Ethiopia still refuses to be the first to recognise Somaliland.

Another option was Tadjourah, offered by Djibouti in 2024 to ease tensions between Ethiopia and Somalia. The offer included full administrative control. Djibouti's then Foreign Minister **Mahmoud Ali Youssouf** – now African Union Commission chair – said it was meant to affirm that 'landlocked countries should have free, predictable, and unhindered access' under international law. Ethiopia responded by requesting an extra-territorial corridor and the right to establish a naval base. President **Ismaïl Omar Guelleh** rejected this as 'going far beyond what he could offer', adding that Ethiopia could access a number of ports without taking sovereign control (AC Vol 65 No 16).

MORE THAN ACCESS

Control has remained central to Abiy's plans. While access could be negotiated through bilateral treaties, Special Economic Zones, internationally administered corridors or even a Hong Kong-style leasehold, he appears unwilling to accept anything short of Ethiopian sovereign control – including a territorial corridor, full administrative authority and a naval base.

After Eritrea's independence, Ethiopia used Assab freely until 1998, when war broke out and relations collapsed. Assab had been Ethiopia's main port during the Derg regime, especially after guerrilla activity disrupted the Djibouti railway from 1977. Geographically, it remains the most logical option. Abiy raised the issue with President **Issayas Afewerki** after their 2018 peace deal. Ethiopia's Maritime Affairs Authority studied Eritrean ports, noting infrastructure gaps at Massawa and the need for road upgrades.

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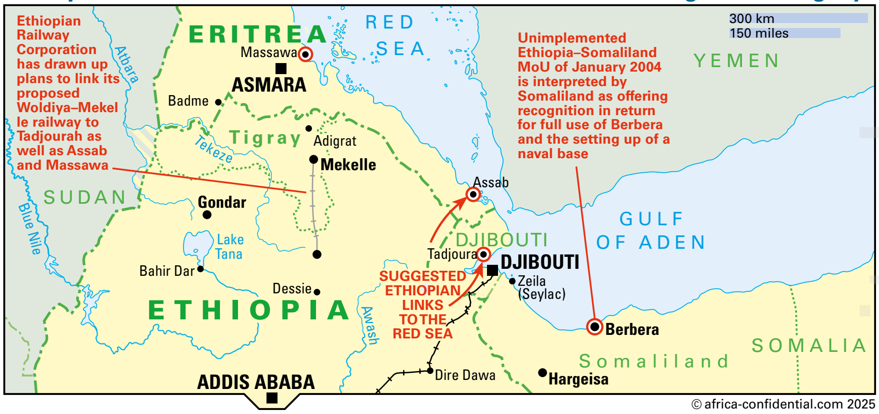
THE FIGHT FOR THE RED SEA:
Ethiopia's maritime ambitions clash with Eritrea's hard-fought sovereignty



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The state-owned Ethiopian Shipping and Logistics Service Enterprise planned to take over Massawa, exploring cargo opportunities. Ethiopia rebuilt the road to Assab and offered machinery and power to upgrade the port – both rejected by Eritrea. The Ethiopian Railway Corporation recently revealed plans to link its proposed Weldiya-Mekele Railway to Tadjourah, Assab and Massawa. None of this was accepted by President Issayas.

Abiy's 2018 peace deal with Eritrea earned him the Nobel Peace Prize, but it quickly unravelled (**AC Vol 60 No 22**). Issayas, frustrated by the lack of recognition, was fully committed to the war against the Tigray People's Liberation Front (TPLF), launched jointly with Abiy in November 2020. That war appears to have been the true basis of their alliance – one of the few things they shared.

But then Issayas strongly opposed the Pretoria Peace Agreement in 2022, calling it premature and insisting the TPLF must be destroyed (**AC Vol 63 No 22**). Abiy, facing global condemnation over Tigray, felt he had won and ended the war. Yet he did little to implement the agreement, and at least one TPLF faction is now willing to align with Issayas to destabilise Abiy's regime.

MILITARY AIMS

As Abiy calls for a negotiated settlement over Assab, he has also prepared for war – and hinted at broader ambitions. Both sides now support each other's opposition movements. Eritrea backs hardline TPLF elements, Fano militias in the Amhara region, and the Oromo Liberation Army (OLA). Ethiopia supports the Red Sea Afar Democratic Organisation (RSADO), Brigade Nhamedu, the Eritrean National Salvation Front, and the Eritrean Afar National Congress – all of which have bases or offices in Ethiopia.

Support for Afar groups suggests Ethiopia's interest extends beyond Assab. Afars inhabit Eritrea's southern Danakil region, reaching as far north as Massawa. RSADO, created under Ethiopian auspices during the 1999 war, calls for autonomy in Dankalia. Reactivated earlier this year, RSADO's Chair **Ibrahim Haroun** says the next phase will involve naval development

HOW RIVAL ALLIANCES TARGET THE RED SEA

A central pillar of Prime Minister **Abiy Ahmed's** foreign policy is his close relationship with President **Mohammed bin Zayed al Nahyan** (MBZ) of the **United Arab Emirates**. This has brought significant financial support to Abiy and Ethiopia – including US$3 billion in 2018 as part of the Eritrea deal, and further funding for the Cheka project above Addis Ababa. Emirati investments span agriculture and the UAE provided military training and drones during the Tigray war. Many of these deals remain opaque and have raised concerns.

The UAE backs Ethiopia's push for Red Sea access. Abu Dhabi wants to regain use of Assab, which it operated as a base during the **Yemen** war (2015-2021), after losing its Doraleh port contract in **Djibouti** in 2018. It currently manages Berbera – investing over US$440 million – and uses Bosaso in Puntland to supply arms to the Rapid Support Forces (RSF) in Sudan. But it controls no Red Sea port – a gap it sees as critical to its regional trade ambitions and its rivalry with **Saudi Arabia**.

Ethiopia's ties to the UAE have fuelled perceptions it supports the RSF – reinforced by the Sudan Armed Forces' closer alignment with Eritrea. In May, after a RSF drone strike on Port Sudan, the SAF moved air units to Asmara. In any Ethiopia-Eritrea conflict, Sudan would likely back Eritrea. With the Grand Ethiopian Renaissance Dam (GERD) formally opened in September, Ethiopia has linked its two transboundary priorities – the Blue Nile (Abay) and the Red Sea – as core strategic issues. Egypt sees this as a threat to its regional standing, and Sudan broadly agrees, though its tensions with Ethiopia centre on the contested Al Fashaga border, now largely under Sudanese control (**Dispatches 6/11/24**).

Egypt has strengthened ties with Eritrea (**AC Vol 66 No 15**). President Issayas Afewerki recently spent five days in Cairo, where one topic under discussion was whether Egypt's Red Sea fleet would assist if Ethiopia attacked Assab. Egypt's fleet includes helicopter carriers, missile boats and frigates. It recently joined Red Wave 8 – a joint exercise of the Council of Arab and African Coastal States of the Red Sea and the Gulf of Aden, which is exploring a unified defence strategy for the region.

This reflects Saudi Arabia's growing interest in Red Sea security. Crown **Prince Mohammed bin Salman** (MBS) signed a logistics hub deal in Djibouti last year and has shown interest in developing Assab. Saudi Arabia regards the Red Sea as its strategic domain and opposes any Emirati foothold.

In October last year, Eritrea hosted a summit with the presidents of **Somalia**, Eritrea, and Egypt, agreeing to deepen regional security cooperation. Ethiopia's ties with Somalia have slightly improved, but Somalia is preparing to host thousands of Egyptian troops under the African Union Support and Stabilisation Mission in Somalia (AUSSOM) – a move that alarms Ethiopia.

Prime Minister Abiy's foreign policy has triggered regional concern. Ongoing internal unrest involving the Tigray People's Liberation Front, Fano militias and the Oromo Liberation Army has weakened Ethiopia's position. The Memorandum of Understanding with Somaliland, the perceived alignment with the RSF, and persistent Red Sea claims are widely seen as driven by the UAE. As host to the AU in a modernised Addis Ababa, Abiy may win praise – but few peers are impressed by his foreign policy gambles. ●

aligned with 'current military requirements, and Ethiopia's aims'. Ethiopia is now positioning itself – however implausibly – as a patron of Afar self-determination. It cites the Derg's creation of the Afar Assab Autonomous Region in 1989, led by **Mohamouda Gaas**, who later headed the Afar Revolutionary Democratic Unity Front.

Letters from Foreign Minister **Gedion Timothewos** to the UN formally accuse Eritrea of preparing for war and risking regional conflict. They cite violations of Ethiopia's territorial integrity and 'clear collusion' with a hardline TPLF faction (**Dispatches 13/10/25** & **AC Vol 66 No 22**). The alliance is 'funding, mobilising and directing armed groups' in Amhara – a coordinated threat to Ethiopian sovereignty. The letter accuses Eritrea of 'unrelenting cooperation and coordination' in planning major offensives, 'repeated provocations', 'territorial occupation' and 'sponsoring armed groups to destabilize Ethiopia' – a 'flagrant violation of international law'.

Abiy has questioned Eritrea's very legitimacy, claiming there is 'no official record or institutional decision' documenting Ethiopia's loss of Red Sea access – no cabinet, parliamentary, or public process. Ethiopia's Ambassador in Nairobi, General **Bacha Debele**, echoed this, saying Eritrea's separation was shaped by 'internal conflict and external pressures' and remains subject to 'unresolved legal and moral scrutiny'.

Eritrea's Ministry of Information responded that Abiy himself signed the 'Joint Declaration of Peace and Friendship' in Asmara in July 2018, which endorsed the 2006 demarcation by the Eritrea-Ethiopia Boundary Commission. Alongside this sharper rhetoric, Ethiopia has stepped up diplomatic efforts – participating in the third UN Conference of Landlocked Developing Countries in Turkmenistan and hosting the first Africa Maritime Conference in Addis Ababa in October, pushing its claims at both.

Abiy appeared to assume the ENDF could strike quickly to seize Assab and present Eritrea, the AU and the international community with a *fait accompli* – banking on global distractions and Eritrea's pariah status. His commanders seemed confident of victory.

But Ethiopia is in no position to fight. The IMF and World Bank warned in September that its debts are 'unsustainable'. War would damage investor confidence and threaten Abiy's development and prestige projects. It could also destabilise regional alliances and draw in much of north-east Africa – including **Egypt**, **Saudi Arabia**, the **United Arab Emirates**, **South Sudan**, Eritrea and **Libya**. Sudan's conflict shows how fast local wars can escalate. ●

ETHIOPIA

Fano's battlefield gains show Abiy's shaky grip on the regions

Published online 14 November

Federal government is pushed back hard as opposition forces in Amhara, Oromia and Tigray form a loose anti-regime front, redrawing the political map in the Horn

After recent victories by insurgents in Amhara, Prime Minister **Abiy Ahmed's** government has been showing signs of the strain as its opponents join forces and launch heavier challenges. In a 2 October letter to the UN, the Foreign Ministry accused the Tigray People's Liberation Front (TPLF) and **Eritrea** of 'funding, mobilising, and directing' Fano forces' successful offensives in the North Wollo area. The TPLF had fought against Addis Ababa and its Eritrean and Fano allies in the 2020–22 Tigray war which ended with the Pretoria Agreement.

In the aftermath of that accord, the political elite in Tigray split. One faction led by **Getachew Reda**, former president of the interim authority in Tigray, now aligns with Abiy, supporting the rebellion against former TPLF comrades, while the TPLF-led regional government in Mekelle flirts with long-time foes from the Eritrean government. That could make a Tigray a flashpoint again, as fears of a regional conflict grow (**AC Vol 66 No 19**).

In late September, Fano scored a major victory, defeating the Ethiopian National Defence Force (ENDF) in battle near the town of Woldiya. In a series of coordinated offensives, Fano inflicted heavy losses on ENDF's Eastern Command, particularly the 12th and 65th divisions.

Asres Mare, a Fano commander, said the group captured more than a hundred soldiers and seized heavy weapons, a claim backed up by images on social media. These clashes marks Fano's most serious test yet, evolving from guerrilla operations into a conventional military force. This runs counter to Addis Ababa's portrayal of the movement as a disorganised extremist militia with limited capabilities and public support.

After the battle near Woldiya, fighting spread across North Wollo, with clashes reported near the strategic town of Gashena and in Gerchecha, only a few kilometres from Bahir Dar, the Amhara regional capital.

EMERGING CONVERGENCE

The pro-TPLF media outlets boosted Fano's gains. This reflects TPLF's rapprochement with former adversaries in the Amhara militias, based on its assessment of the federal government as its 'principal enemy'. Now, the TPLF wants cooperation with Fano to isolate Abiy and the Federal government. A top TPLF leader told *Africa Confidential* that the lack of 'serious strategic collaboration in 2020 put us in dire circumstances. We were surrounded 360 degrees by hostile forces. We don't want that to happen again, if the worst comes.'

Insiders don't expect to see Tigrayan combatants sent Amhara to fight alongside Fano, given the risk of local hostility. But they think that Tigrayan commanders could offer guidance on tactics, perhaps with Eritrean intelligence officers helping to coordinate (**AC Vol 66 No 15**).

This underscores Mekelle's and Asmara's interest in using Amhara as a buffer, both to deter Ethiopian military offensives and weaken Addis Ababa via proxy activity. The areas surrounding Woldiya and the broader North Wollo corridor – terrain along the main route to Tigray and Afar – are critically important. If the ENDF loses control over this area, it would compromise its future operations against Eritrea and Tigray.

The federal government and its allies have warned about the emergence of a coalition involving the TPLF, the Oromo Liberation Army (OLA) and Fano, engineered by Eritrea, which has bilateral ties with each group, and supported by **Egypt** (**Dispatches 13/10/25**).

When opposition forces and representatives of armed groups met in

FOCUS RETURNS TO TIGRAY AND RISKS OF A FAILED PEACE

The Tigray People's Liberation Front (TPLF) has clawed back much of the power and influence it lost in the fall-out and splintering of political forces in the region after the signing of the Pretoria peace accord in November 2022.

The Tigray Interim Regional Administration (TIRA) is the region's last institutional link with the federal government in Addis Ababa. But the TIRA leader, General **Tadesse Werede**, is accused by the TPLF of appeasing Prime Minister **Abiy Ahmed**. An unravelling of the TIRA and its links to Addis could accelerate conflict. Another flashpoint would be the planned federal elections in mid-2026 which TPLF supporters are likely to boycott, replaying the events that led up to the start of the war in 2020.

A recent road blockade and protests by Tigray Defence Forces (TDF) demanding wage adjustments was said to have been orchestrated with TPLF approval to pressure TIRA leader Gen Werede. His perceived indecision has hindered TPLF from mobilising the regional apparatus toward its objectives of securing the return to Tigray's pre-war border and, more broadly, its autonomy.

We hear that Eritrea's government in Asmara wants to see Gen Tadesse removed. The TPLF wants either to force his resignation or cut his influence by positioning **Amanuel Assefa** – deputy president of the interim administration and deputy chairman of TPLF – to assume more responsibilities informally.

The standoff was defused through concessions, but it underscores the tenuous position of Tadesse's administration. It is incapable of enforcing the 2022 Pretoria Agreement stipulations such as the return of displaced people and the withdrawal of non-ENDF forces from Tigray. Those are priorities for Tigrayans.

The fragility of the Pretoria framework was reinforced by the clashes between the TDF and a breakaway faction known as the Tigray Peace Forces (TPF), said to be backed by the federal government at its bases in Afar in early November. Multiple sources in the region told us that TPF units attacked TDF positions along the border, prompting a counter-offensive that pushed several kilometres into Afar. Federal drones were subsequently deployed in support of TPF, further straining relations between Mekelle and Addis Ababa.

This points to the federal government's use of TPF as a proxy force to destabilise Tigray, mirroring what it accuses Mekelle and Asmara of doing through Fano. These developments have emboldened hardliners within TPLF, calling for tougher action and claiming the Federal government will not adhere to the Pretoria Agreement.

Reports of gold smuggling replenishing its finances, some of which is said to be used for arms shipments via **Sudan** and **Eritrea**, suggests the TPLF could be better positioned militarily than it was when its war started with Addis Ababa in 2020. Reports of intense military training across the region are raising more concerns: these include the recent graduation of Tigrayan commandos in Sudan by Army 70 of the TDF (said to be with the backing of the Sudanese Armed Forces).

General **Tsadkan Gebretensae**, a key Tigrayan wartime leader, has launched The Movement for Change in Tigray, aimed at ousting the TPLF through civil resistance and openly backed by the federal government. All this shows that Ethiopia's political struggles are again focusing on the decisive role of Tigray.

Tsadkan's plan complements efforts led by **Getachew Reda**, the former TPLF leader and interim regional president, to broker a compromise with the **Demeke Zewdu**-led administration in the contested Welkait area (on the Amhara-Tigray border) to facilitate the return of Tigrayan IDPs. That plan breaks with the stipulations of the Pretoria accord, while leaving the local Amhara administration and combatants intact.

This manoeuvre shows the difficulties facing the Federal government's plan. By getting Getachew to lead the bid for a compromise on the territorial dispute between the Amhara and Tigray regions, it is trying to appease Tigrayans but while also signalling to the Amhara that contested territories will remain under Amhara control. If, as seems likely, these initiatives from Tsadkan and Getachew fail and the TPLF consolidates public support, it will be another setback for Abiy. ●

Amsterdam in October, after a similar gathering in August, they signalled that behind-the-scenes rapprochement among previously antagonistic factions, particularly Eritrean, Amhara, Tigrayan and Oromo groups, has reached an advanced stage.

As well as a growing alignment of objectives between TPLF, Fano and OLA leaders, factional hostilities between their supporters are ebbing. Ethnic rivalries that once defined relations have quietened.

Former Amhara Special Forces Commander General **Teferra Mamo**, now a senior commander in Fano, declared Fano would not permit ENDF to attack 'Tigrayan and Eritrean peoples' through its territory. **Jaal Jiregna Gudeta**, senior adviser to OLA leader **Jaal Maro**, denounced the federal government's purported intention to reclaim Eritrea's Assab port by force, calling it a breach of international agreements and irrelevant to the Oromo cause. Fano forces are pushing an increasingly regional 'Amhara first' approach, departing from the region's historical ties to Ethiopian nationalism.

Rising tensions in the Afar region suggests Addis Ababa is losing ground there, undermining its efforts to consolidate an Afar-based coalition against Eritrea. An attack in early October by Afar residents and local militants on pro-federal Tigrayan forces (aligned with Abiy and Getachew) around Abala was a warning sign, along with reports of pro-Eritrean armed groups in the region, said to be bolstered by defectors from the federal army.

On 6 November, officials from the Afar region (loyal to the federal government in Addis Ababa) accused TPLF soldiers of crossing into Megale district in the north-west of their region, seizing six villages and bombing civilians with mortars. Independent sources have confirmed the clashes with both federal and TPLF forces involved, with one reporting that at least 100 people were killed. Taken together, these developments point to the emergence of a loose, pragmatic alliance united by the goal of weakening the federal centre, which could evolve into a wider anti-regime coalition.

DEFENSIVE GOVERNMENT

The federal government increasingly looks cornered despite its projection of strength and bellicose rhetoric.

Addressing parliament in late October, Prime Minister Abiy escalated his rhetoric, attacking Tigray and Eritrea. He dismissed TPLF's status as a Pretoria co-signatory and blamed it for rendering Ethiopia landlocked three decades ago when Eritrea seceded (**AC Vol 63 No 22**). Then he underlined Ethiopia's claimed rights to the Eritrean port of Assab. This combative tone, argued rivals such as **Jawar Mohammed**, was attempting to mask heavy setbacks.

Beyond military losses in Amhara, the government's image-building efforts – centred on the Grand Ethiopian Renaissance Dam (GERD) inauguration and rhetoric about 'reclaiming Red Sea access' – have failed to win over people. Their arguments haven't resonated much beyond pro-government activists.

Irreecha, an Oromo thanksgiving festival, promoted by state media with federal cash, reaffirmed that the Oromo people remain the government's main domestic constituency. This perception, cultivated by the government, has pushed Oromo nationalist currents into retreat, making Oromia perhaps the only region where the ruling Prosperity Party retains grassroots support.

Elsewhere the federal government has lost much backing, especially among the Amhara, many of whom see the administration as an 'Oromo government'. Deputy Prime Minister **Temesgen Tiruneh**, an Amhara Abiy loyalist, recently captured this frustration: 'Amhara [people] may have had traitors [in their midst], but I have never seen them become emissaries at the level they have now become.'

ETHIOPIA'S FEDERAL CRISIS:
Tigray, Amhara and Oromo insurgents ally against Addis Ababa

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FRAYING COALITION

The erosion of the federal government's legitimacy has been compounded by the online activism of Oromo and Amhara figures such as **Jawar Mohammed** and **Lidetu Ayalew**. Their campaign has tapped into mounting economic hardship, political repression and inflation, successfully bridging Oromo and Amhara divides in a manner reminiscent of the Oro-Mara alliance that helped toppled the former government under Prime Minister **Hailemariam Desalegn** in 2018.

The campaign's immediate effects are largely confined to online politicking, the movement has positioned itself as a serious force should a power vacuum open up. It directly challenges Prime Minister Abiy, who has maintained a near-monopoly over the political centre as the primary bridge across Ethiopia's ethno-political divides.

In this changing climate, support from some heavyweight Tigrayan dissidents for Addis Ababa stands out. Prominent Tigrayan wartime leader **Tsadkan Gebretensae's** endorsement of the Abiy government's campaign to reclaim Assab 'by force, if necessary' sparked debate in Tigray but it failed to make an impact nationally.

The government's dependence on such figures may suggest its weakness. Likewise, repeated military parades and bellicose rhetoric about reclaiming Assab or crushing 'internal enemies' are a less reliable indicator of strength than battlefield reversals. ●

CHAD/SUDAN

Abu Dhabi pressures Mahamat Kaka

The RSF's seizure of El Fasher exposed the fragility of the Ndjamena regime and its dependence on United Arab Emirates funding

The seizure of El Fasher by the Rapid Support Forces (RSF) on 26 October prompted louder calls from United States and European Union politicians for sanctions against the militia and its sponsors in the **United Arab Emirates.** But opinion in the region is more divided – especially in Chad, where concern is growing over the stability of the Ndjamena regime (**AC Vol 66 No 22** & **Dispatches 11/8/25**).

Throughout the siege of El Fasher, which began in late April 2024, the Zaghawa community was divided. President **Mahamat Idris Déby Itno 'Kaka'** shifted his support to the RSF after the UAE pledged around US$1.5 billion in projects for Chad, following his visit to Abu Dhabi in June 2023 (**AC Vol 65 No 15**).

For over a year, Amdjarass airport – and occasionally Ndjamena airport – was used to supply weapons and ammunition to the RSF (**AC Vol 64 No 25** & **Vol 65 No 3**). Fuel convoys crossed the country to reach RSF units in Adré. Mahamat Kaka's regime tried to prevent army officers joining Zaghawa armed groups in Darfur (about 1,500 reportedly did so), but remained silent as Chadian Arabs and Ouaddaï people joined the RSF.

To consolidate his base, Mahamat Kaka appointed dozens of generals – many still living in rural areas and receiving stipends, fuel and other subsidies. He reshuffled the military and security leadership, pensioning off senior officers from his father **Idriss Déby Itno's** era. Déby was killed in 2021 (**AC Vol 62 No 9**). Mahamat Kaka's control over the state security apparatus depends heavily on funding from Abu Dhabi. Without it, his political survival is uncertain.

In February 2024, **Yaya Dillo** – who was close to the Itno family through his mother – was killed (**AC Vol 65 No 6**). The order came from the presidency as Yaya tried to unite two Zaghawa opposition factions: one opposed to backing the RSF, the other resentful of Kaka's patronage network. After his death, his brother **Ousmane Dillo** travelled to Darfur to fight the RSF, returning to Ndjamena after the anti-RSF resistance collapsed in El Fasher.

Attempts to galvanise Zaghawa resistance failed. Yaya Dillo was unpopular, even among ostensible sympathisers. He was seen as impulsive and self-serving.

His brother's social media remained defiant, but the circumstances of his return to Ndjamena cast doubt on his hardline rhetoric. He claimed to have been seriously wounded, yet was discharged from hospital after just 24 hours. We hear he struck a deal with the RSF to leave El Fasher alive – while many of his relatives were slaughtered.

The Zaghawa groups most marginalised by Mahamat Kaka's policies – the Kobe and Kapka – lost key positions in the state. Though not the largest, they are well educated and have long staffed the civil service. They did not support Yaya Dillo's personal ambitions.

The fall of El Fasher was seismic. Many Zaghawa from both sides of the border had invested in the city. Hundreds of Zaghawa fighters and untold civilians died in the final days. Afterwards, fighters gathered near Tiné, unsure whether to cross the border and disarm or continue fighting. **Minni Arkou Minnawi**, former Darfur governor and Zaghawa commander, said logistical support had been expected from Port Sudan.

ETHNIC FEUD

The collapse prompted nearly 400 Presidential Guard soldiers to leave the Rose Palace and head for the border. Zaghawa near the frontier have taken up arms, calling on relatives to join them – ostensibly to block incursions. The war in El Fasher has become an ethnic feud between Arabs and Zaghawa. Control of the former Darfur capital is now tied to broader political dominance after decades of escalating confrontations.

This sentiment is even stronger across the border. Many Chadians see the Zaghawa as a ruling elite since December 1990 when Idriss Déby Itno seized power, accused of privatising the state and excluding others. Though they represent less than 3% of the population, Zaghawa groups have monopolised power in both countries.

For non-Zaghawa communities, El Fasher's fall is seen as revenge. They argue the scale of killings has been exaggerated and that Zaghawa abuses – including against Arabs – have been under-reported. Sudanese commentators, especially from Khartoum and the Nile Valley, have largely ignored the ethnic composition of the armed groups abandoned in El Fasher. This sense of revenge is rooted in daily humiliation under Zaghawa rule. The opposition insists the issue is not genocide, but rebalancing the influence of each group in Darfur and Chad and rejecting the current status quo.

Mahamat Kaka is under pressure. His long-planned trip to Abu Dhabi – to chair an investor conference for the Chad National Programme for Development – took place days after El Fasher fell. The conference did not deliver the outcome Ndjamena had hoped for. Investors sought reassurance on issues such as corruption and political stability, but Chadian officials struggled to show meaningful progress – and sidestepped questions on Sudan.

Around $20bn was pledged – a modest success, though short of the $30bn target. The 2017 conference also raised $20bn, despite lower expectations and Idriss Déby's strong western ties. The Chadian government's plan to build another refinery near Ndjamena was undermined by Mahamat Kaka's inability to explain the ongoing fuel shortage – even for public services.

Most of the investors were **Indian** companies, rather than western, **Chinese** or **Turkish** firms. Rather than securing development funds, observers believe Mahamat Kaka's priority was to seek direct support from UAE President **Mohammed bin Zayed al Nahyan** (MBZ) – aware that Zaghawa unity is fragile and could yet turn against him. ●

SOUTH SUDAN

Spinning out of control

The dismissal of Salva Kiir's closest ally in a chaotic reshuffle has left him looking increasingly isolated

With the economy racing downhill, the peace process ever more fragile and the political landscape dominated by the treason trial of former First Vice-President **Riek Machar Teny Dhurgon** and his associates, embattled President **Salva Kiir Mayardit** did what he does best – reshuffling his cabinet (AC Vol 66 No 7). He dismissed Finance Minister **Athian Diing Athian** after only two months, replacing him with **Bak Barnaba Chol**, who previously held the post between August 2023 and March 2024 – the eighth change in the past five years (AC Vol 66 No 18).

Also dismissed were Information Minister **Michael Makuei Lueth**, Justice Minister Joseph **Geng Akech**, Roads and Bridges Minister **Simon Mijok Mijak** and Environment Minister Josephine **Napwon Cosmos**. Their replacements are as follows: **Ateny Wek Ateny** takes over as Information Minister, Michael Makuei Lueth is reassigned to the Justice Ministry, **Peter Lam Both** becomes Minister of Roads and Bridges and **Mabior Garang de Mabior** – son of the late liberation leader **John Garang** – is appointed Environment Minister.

Kiir's cabinet hasn't met between last March and November, and he appears increasingly isolated – ruling by decrees read out on South Sudan TV. Further decrees replaced most of his senior aides, including private secretary, office manager, chief administrator, presidential affairs minister, head of legal administration, and chief of protocol. He also removed National Security Advisor **Madut Dut Yel**, reappointing **Tut Gatluak Manime**, who had previously held the position for 11 years before being dismissed in January.

More significant is the sacking of **Benjamin Bol Mel**, Vice-President for Economic Policy and, until recently, widely seen as Salva's likely heir. His vice-presidency – and his role as deputy chair of Salva's Sudan People's Liberation Movement (SPLM) – has been handed to veteran Salva loyalist **James Wani Igga** (AC Vol 66 No 17).

Bol Mel's fate is closely tied to the chaos at the Ministry of Petroleum. On 3 November, junior minister **Deng Lual Wol** was replaced by **Chol Thon Abel**. Thon Abel lasted only days before being sacked and replaced once again by Lual Wol. Thon Abel's parting shot was to leak correspondence about Bol Mel's alleged sale of oil futures worth US$2.5 billion. The government has announced plans to prosecute Thon Abel, but Salva is under pressure to force Bol Mel to repatriate funds from oil sales believed to be held in the **United Arab Emirates** and **Kenya**.

There is speculation that Bol Mel will be used as a fall guy for a major political realignment by Salva – and a possible release of **Riek Machar**. Several of Bol Mel's ousted allies are expected to be replaced by SPLM veterans.

In October, South Sudan signed a bilateral agreement with **Sudan** to safeguard its vital oil exports, which account for 90% of government revenue. Days later, the pipeline to Port Sudan was shut down by a Rapid Support Forces drone attack on its processing facilities in Heglig – a crushing blow to Juba's finances. The UN Mission in South Sudan estimates that such disruptions have led to a 24.5% contraction of the economy.

In late October, the African Union Peace and Security Council became the latest to caution that delays in implementation of the 2018 Revitalised Agreement on the Resolution of the Conflict in the Republic of South Sudan (R-ARCSS) risked a return to all-out civil war. Last month, the UN Commission on Human Rights in

South Sudan warned the UN General Assembly that escalating armed conflict and political crisis required 'decisive and coordinated international action' to 'avert a total collapse of the country's political transition'.

'SIPHONED OFF'

Commissioner **Carlos Castresana Fernández** told the meeting that the conflict was 'fuelled by corruption – pure and simple'. He maintained that 'billions in oil revenues have been siphoned off while the population starves. Hospitals have no medicines, schools have no teachers, and soldiers go unpaid while elites enrich themselves through opaque contracts and off-budget deals'.

Instead of strengthening peacekeeping in the face of the mounting violence, Juba has ordered the UN Mission to downsize by 70%, cease operations in most of the country and close the Protection of Civilians sites that have sheltered thousands of people for the past 11 years. It also ordered the grounding of 'all UNMISS helicopters and any aircraft with installed intelligence, surveillance, and reconnaissance' capabilities – significantly curtailing the mission's ability to monitor conflict and to protect civilians.

Critics, including former foreign minister and elder statesman Lieutenant-General **Nhial Deng Nhial**, say Kiir is determined to ignore the provisions of the R-ARCSS peace deal and risks destroying the country. In the most significant defection in recent years, Nhial Deng announced his resignation from the ruling party and the formation of the South Sudan Salvation Movement, accusing the president of ruling in a 'purely dictatorial fashion', 'betraying the founding ideals of the SPLM', and turning South Sudan into a 'state on the brink of collapse'. ●

NIGERIA

Tinubu pushes the multi-party system over a cliff

Instead of attacking the government on insecurity and economic woes, the opposition wastes its energy on factional battles

Two resonant images sum up the decline and fall of multi-party politics in Nigeria. The first is of the headquarters of the People's Democratic Party (PDP) at its Wadata secretariat in Abuja, emblazoned in Nigeria's green and white national colours, entirely sealed off behind a barbed wire cordon on 19 November. The second, months earlier, seems prescient: President **Bola Ahmed Tinubu** addresses the National Assembly in Abuja and casts an eye towards once powerful PDP: 'It is a pleasure to see you in such disarray.'

Whatever else is happening in Nigeria's politics, the old triumphalist claims of the PDP to be Africa's biggest political party ring hollow after it has struggled for ten years in the opposition wilderness.

That doesn't mean that Tinubu's All Progressives Congress (APC) can claim to have won the hearts of most Nigerians. Rather it is comfortable in its unstated posture of being the lesser of the available evils in the political marketplace.

Even that modest claim is contested. President Tinubu and the APC are held responsible for much of the economic hardship in the aftermath of ending the fuel subsidy and allowing the naira to fall sharply – both moves stoking inflation.

Added to that is the rising insecurity across the country with the army deployed in 30 of the 36 states. Such has been the level of violence that evangelical activists have lobbied the national authorities and international organisations, claiming a murderous campaign against Christians. That sent signals to the **United States**, quickly taken up by President **Donald Trump's** administration in Washington DC, which threatened visa bans, aid cuts and even military intervention unless Nigeria acted quickly to rein in the mayhem.

Such economic and security threats should have pushed the ruling party on to the back foot. Instead, Tinubu and his associates are already talking confidently of a landslide victory 15 months away from national elections in 2027. Partly this is savvy tactics by the party managers but much is due to the perennial crisis that has consumed opposition parties especially the PDP.

The PDP, which ruled Nigeria from 1999 to 2015, has for two years been unable to hold a convention to pick its leaders due to multiple court cases. At the centre of the imbroglio is **Nyesom Wike**, a leading member and erstwhile financier of the party, who serves in Tinubu's cabinet as minister of the federal capital territory.

DEFECTIONS

The party has been hollowed out. Former Vice-President **Atiku Abubakar**, who was the PDP presidential candidate in the last poll, defected with his supporters to the African Democratic Congress (ADC) as he prepares to make a seventh run for the presidency.

Wike, determined to see Tinubu re-elected, doesn't want the PDP to produce a flagbearer in 2027. This has pitted him against those PDP members who argue that it is makes no sense for an opposition party to support the President in a liberal democracy.

The opposition blame Tinubu for putting Wike up to this; insisting its has been his stock in trade since his days as godfather of Lagos State where his party has reigned supreme for 26 consecutive years.

With party primaries just five months away, five PDP state governors have defected to the ruling All Progressives Congress (APC) along with over 50 federal lawmakers and nearly 100 state legislators, giving the APC a super majority.

This has altered Nigeria's political landscape as states like Taraba, Enugu, Bayelsa, Delta and Akwa Ibom which had all been ruled by the PDP for 26 years have now been taken over by the APC.

An incentive being for the defecting governors is that those seeking a second term in office will be given automatic tickets and federal backing for elections and special projects; and those rounding off their second term will not be harassed by anti-corruption agencies when they lose their immunity after leaving office in 2027.

The PDP, which boasted of 31 out of the 36 governors in its heyday, now has just seven. A handful of these governors have already pledged their loyalty to Tinubu. The PDP could end up running just five states when Governor **Caleb Mutfwang** of Plateau State and his Adamawa State counterpart, **Ahmadu Fintiri**, join the APC in the coming weeks.

Governor **Sim Fubara** of Rivers State, a PDP governor, who only recently returned from a six-month suspension, after a brief defiance is now a lame duck. He has passed the state back to Wike

JONATHAN'S SHAKY COMEBACK

Since his defeat to the **Muhammadu Buhari** in 2015, **Goodluck Jonathan** has stayed away from domestic politics, opting instead to promote good causes in Africa through his charitable foundation, serving as a special envoy for the Economic Community of West African States in the 2020 **Mali** crisis and leading Africa Union election observation missions.

Jonathan's approach changed early this year when he criticised President **Bola Tinubu's** suspension of Governor **Sim Fubara** of Rivers State and the state of emergency, as well as the judiciary's role in the travails of his Peoples Democratic Party (PDP).

Some in Tinubu's camp are resigned to losing support in the north – either to former Vice-President **Atiku Abubakar**, a northerner, making a seventh run for the presidency on the African Democratic Congress (ADC) ticket, or a younger northern contender such as **Nasir El-Rufai**.

So the second leg of Tinubu's re-election strategy is to unite all southern states behind his candidacy. But if Jonathan decides to stand, he could get in the way of that plan. He is a southerner and constrained by the constitution to serving just one more term. This means he could be accepted in both the south and the north. Jonathan has been able to establish links with some in the Trump administration on security issues in Nigeria. He has also got the back of some former northern generals.

Should Jonathan stand, Tinubu's team will challenge his eligibility in the courts over which they exercise much influence. We also hear Former Niger Delta militant, High Chief **Government Ekpemupolo** (**Tompolo**), who holds a multi-million-dollar contract to secure pipelines and is close relationship to both the current and former presidents, has been assigned by Tinubu's camp to convince Jonathan not to run. ●

who has in turn pledged the state's votes to Tinubu in 2027.

Osun State Governor **Ademola Adeleke**, known as the 'dancing governor', is expected to leave the PDP as the party's instability threatens his re-election in a few months.

Three PDP governors of the PDP remain steadfast. They are **Seyi Makinde** of Oyo State; **Dauda Lawal** of Zamfara; and Bauchi State, **Bala Mohammed**, who is the chairman of the PDP Governors Forum.

These three were trying to resuscitate the PDP's opposition credentials. This month, they hosted a national convention to elect party leaders which eventually produced former minister **Tanimu Turaki** as national chairman. They also expelled Wike and his faction from the party. This contravened multiple court orders procured by Wike to stall any convention.

Wike's faction, led by **Abdulrahman Mohammed**, retaliated by expelling Governors Makinde, Bala Mohammed and Lawal.

The fight reached a climax on 15 November when Turaki, backed by Governors Mohammed and Makinde, tried to resume operations at the PDP's headquarters in Abuja.

As they tried to reassert control of the headquarters, Wike's loyalists pushed back and a fracas ensued. Policemen under the instruction of Wike, who doubles as minister of the FCT, fired teargas on Makinde and Mohammed as well as journalists.

Then the police sealed off the party's national headquarters. The Wike plan is to drag the crisis on until the next election so that the party will be unable to field any candidates. The judiciary has helped the incumbents by continuously ruling against the opposition.

With opposition parties ADC and Labour Party also enmeshed in their own court battles, some sponsored by Tinubu's allies, many expect an historically low turnout, reinforcing all the advantages of the incumbent. ●

UGANDA

Museveni looks to an oil boost

Growth and exports climb ahead of national elections, as the government pins its hopes on extractive revenues

President **Yoweri Museveni** and his ruling National Resistance Movement (NRM) party approach January's national elections with the National Unity Platform (NUP) opposition targeting his record on education, health and human rights failings (**AC Vol 66 No 20**). The opposition, led by **Robert Kyagulanyi Ssentamu** – aka **Bobi Wine** – has promised 10 million new jobs by 2032, revamped healthcare and education access, an end to 'wasteful' government spending, and the boosting of food security and the crucial agricultural sector.

To counter that, Museveni and the NRM promise future growth, infrastructure investment and 'human development', claiming to have reduced income inequality and poverty, and delivered strong post-Covid job creation, thriving exports and rising revenue collections – in an economy that has 'doubled' in size during the five years of Museveni's sixth presidential term.

Finance minister **Matia Kasaija** predicts that Uganda's US$60 billion economy will – under the government's 'Tenfold Growth Strategy' – multiply to $500bn within 15 years.Uganda's growth prospects rank among the strongest in Africa. GDP growth reached 6.4% this year, according to the IMF, and could approach 10% by 2027, when oil production from the Tilenga and Kingfisher fields is due to begin and the long-delayed East African Crude Oil Pipeline (EACOP) to Tanga, Tanzania, may finally come onstream (**AC Vol 66 No 15**).

This implies that average per-capita incomes – currently south of $1,400 per year – could grow between circa 3.5% and 7% annually in real terms through 2030. The government will have to prevent Uganda's transition to an oil-producing economy from eroding fiscal discipline and distorting the wider economy. Uganda's recent history with the IMF includes its 2021 $1bn Extended Credit Facility (ECF), intended to assist with the pandemic response, which expired – due to Uganda's inability to meet numerous 'quantitative' and 'structural' targets such as the budget deficit – in June 2024 with $130 million undisbursed.

But Finance Ministry officials confirmed in September that they are seeking another ECF programme, to assist with a tight external financing environment that has forced reliance primarily on expensive domestic borrowing. Officials in Kampala claim that Uganda's proposal will be presented to the Fund's Executive Board after January's elections. This suggests that its new programme – which could help unlock other concessional and non-concessional external financing – could be approved by mid-year, when its 2026/27 financial year budget should be known.

By that time, Uganda should have received more World Bank funds. The Bank announced in June that it would resume financing after an almost two-year suspension due to parliament's passage of harsh anti-LGBT measures (**Dispatches 2/5/23**). The over $2bn expected by the Finance Ministry over three years will focus on energy, infrastructure and agricultural projects. The government has already borrowed ($5.3bn) from the Bank's soft loan International Development Association (IDA) affiliate.

COSTLY BORROWING

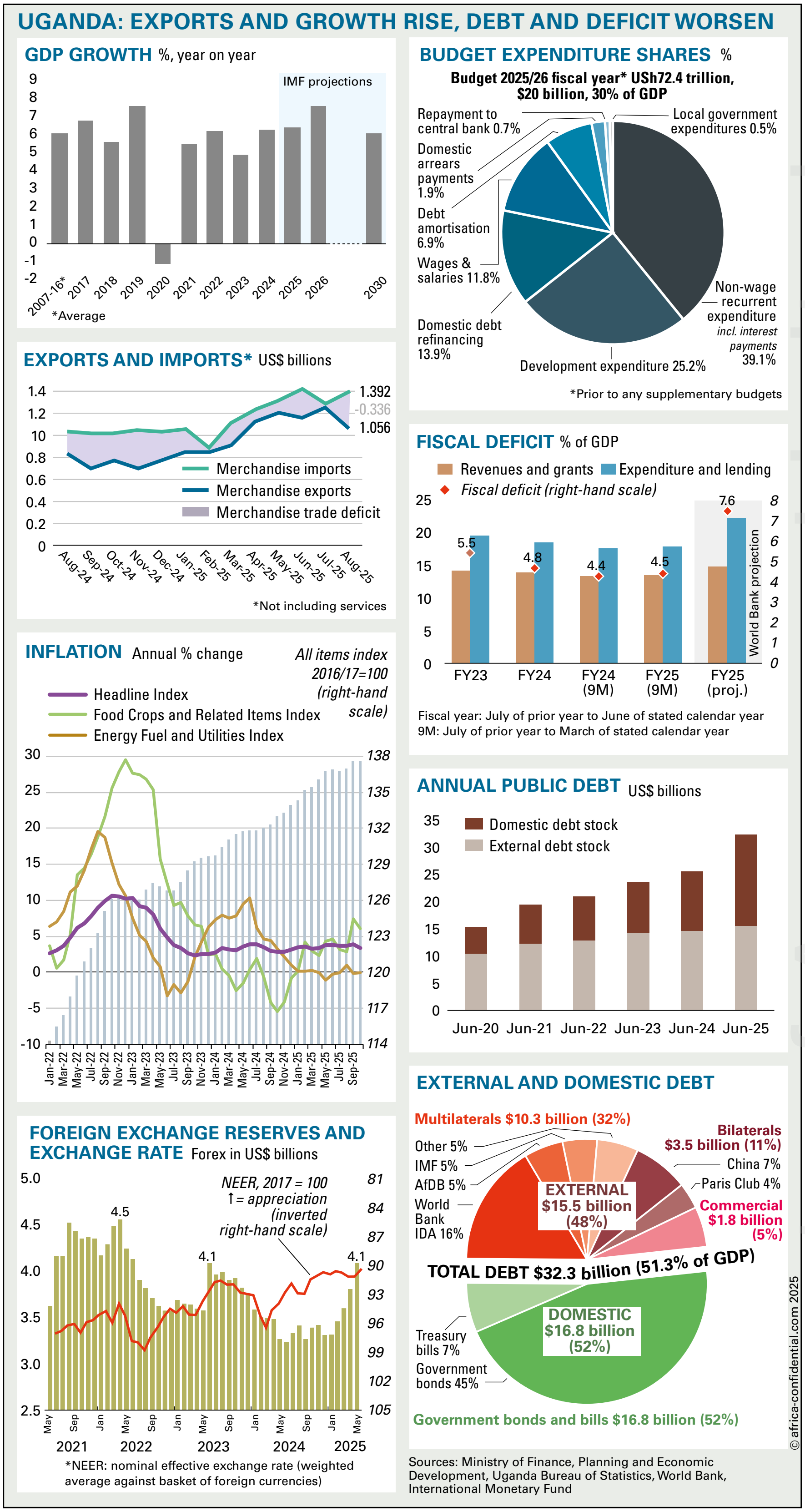
The concessional share of Uganda's external debts exceeds 50%; its external commercial debt comprising $1.8bn (19%) and $2.3bn extended by **China** Export-Import Bank. The government's turn towards domestic borrowing has significant implications although it is mostly government bonds rather than short-term Treasury Bills.

Rapidly rising interest payments – assessed by Fitch Ratings and S&P Global Ratings to have reached 25% of revenues in the 2024/25 fiscal year ending in June – are forecast by Fitch to hit 'almost 30%' this fiscal year. The IMF calculates that Uganda's interest payments equate to almost a third of revenues; the World Bank says they amount to half of total recurrent spending. The official 2025/26 national budget allocation for health, education and social protection spending of 11.3trn shillings equates to 16% of the budget and a similar proportion (30%) of projected revenues.

Uganda's reliance on costly domestic debt also drives concerns over its growing sovereign-banking sector 'nexus', where domestic banks hold an increasing share of government debt. There is no domestic debt restructuring on the horizon to decimate banks' balance sheets, and the banking sector is assessed by the Bank of Uganda (BoU) and IMF to be in good health, despite the failure of tier II institutions Mercantile Credit Bank and EFC Uganda last year. But hefty bank holdings of government debt can crowd out more productive lending to businesses.

OIL INVESTMENT

Boosting economic prospects is a resurgence of foreign direct investment (FDI), exceeding 6% of GDP last fiscal year and predicted to do so in 2025/26. Mostly comprising inflows



to the fledgling oil sector, it has been accompanied by a modest increase in 'portfolio' investment. In the longer-term, FDI is predicted to moderate as oil-related investments slow, though the IMF expects oil revenues for the government to exceed 2% of GDP.

These projected revenues would only partially close the gap between current revenue/GDP levels of around 14% – excluding grants – a 'domestic revenue mobilisation strategy' target of up to 18%, and the government's ambitious 'Tenfold Growth Strategy' target of 30% by 2040. According to the World Bank, Uganda's revenue goals are

CRACKDOWN FEARS RISE AS EAST AFRICAN ACTIVISTS UNITE

Youth-led protests in **Kenya** and **Tanzania** – and the readiness of activists across East Africa to support their neighbours – have put Uganda's ruling party on high alert ahead of January's general elections. Confirmation of the government's anxiety came via President **Yoweri Museveni's** belated acknowledgement that two Kenyan activists, **Bob Njagi** and **Nicholas Oyoo**, had been arrested and detained for five weeks after attending a political rally for opposition leader **Robert Kyagulanyi Ssentamu**, aka **Bobi Wine**. Museveni described the two men as 'experts in riots' who had been put 'in the fridge for some days'.

Ahead of the January elections, Museveni' team worries about collaboration between regional activists. Museveni has claimed that foreign groups are stoking up unrest and warned ominously that 'the ones who are doing that game here in Uganda will end up badly'. Governments 'fear the uprising of young people in Kenya might spread to their countries, so the only way to silence these voices [is] by abduction and torture,' says **Timothy Kalyegira**, a political analyst and journalist. He adds that 'there is growing nervousness and fear caused by those who challenge the political legitimacy of the leaders during the election season'.

Yet National Unity Platform leader Wine has been cleared to run in January's presidential election, after the Electoral Commission rejected his initial submission. His campaign rallies have drawn enormous crowds, prompting speculation that he could win. Five years ago, Museveni claimed a 35% to 58% victory over Wine – though election observers reported intimidation and rigging, including ballot stuffing.

Deals with the **United States** and the **Netherlands** to receive deportees appear calculated to ensure the international community turns a blind eye to any pre and post-election repression (**Dispatches 25/8/25**). Museveni will have been encouraged by the muted criticism from the US and European Union over the killing of hundreds of activists and citizens by Tanzania's government. Yet there is an evident tension between Museveni's determination to win another election but avoid the deadly clashes between protestors and security forces seen in neighbouring Tanzania. Some officials insists they are doing everything to avoid clashes but sometimes the mask slips.

After EU diplomats met Bobi Wine in May to discuss human rights violations and his presidential ambitions, the Ugandan government accused the EU of interfering in domestic politics and funding the opposition. Museveni's son, General **Muhoozi Kainerugaba** – chief of the Uganda People's Defence Forces – accused **Germany's** ambassador in Kampala of 'subversive acts' and threatened to expel him. Muhoozi had previously made similar threats against US ambassador **William Popp** (**AC Vol 66 No 12**).

The Electoral Commission insists it is working to create a safe space for opposition campaigning and to ensure police restraint. But Wine's allies have reported multiple instances of intimidation, arrests and abduction by security forces – all expected to intensify as polling day approaches. Civil society organisations and local journalists are also facing increasing pressure, with tighter regulations and heightened surveillance.

Many activists believe regional governments are collaborating to suppress cross-border campaigners and opposition leaders. They cite the kidnapping of Kizza Besigye from a Nairobi apartment last December – reportedly with the collusion of Kenyan authorities – and the near silence of Kenyan and Ugandan ministers over the arrest and, in some cases, torture of pro-democracy activists in Uganda and Tanzania as evidence (**Dispatches 17/12/24**). ●

still hamstrung by tax exemptions that reduce corporate income tax receipts, the relatively low share of taxes paid by higher-income taxpayers, and extensive tax evasion. This requires better tax administration and eliminating exemptions, but also more efficient spending and a revised, more progressive personal income tax framework to boost revenues while reducing the burden on those with low incomes.

The seven tax bills – across key areas including income tax, VAT, trade, exports and excise duty – presented to parliament in April and signed into law mid-year by Museveni will boost revenues but are likely to be a campaigning point for the opposition ahead of January.

Officials claim a modest reduction in poverty – from over 30% of the population five years ago to around 26% now – but chronic hardship persists in rural regions, particularly in the east and north.

Inflation running below 4% and broadly stable energy prices have slightly eased the burden on low-income households. Food inflation has remained higher, particularly for key staples, despite impressive recent growth in the agriculture sector. Food price inflation had reached over 20% in 2022/23.

BoU Governor **Michael Atingi-Ego** is confident that inflation will remain below 5% in the medium term, helped by a domestic currency that has been among the best performing in Africa this year and last. An unresolved question is whether the BoU is confident enough on inflation to cut rates later this year.

Central bank policy has driven foreign exchange reserves north of $4bn – equivalent to almost four months of imports. This reduces concerns over liquidity and could yet be supplemented by BoU purchases of locally produced gold. The high price – currently over $4,000 per ounce – of gold has significantly boosted Uganda's trade balance.

Yet increased imports – driven by machinery and other imported equipment and inputs for oil and major infrastructure projects – mean that Uganda's trade ledger remains in deficit, along with its current account. Price and volume-driven increases in coffee exports this year will also boost the trade balance, and domestic revenues. But fears persist over the impact on Uganda's coffee farmers – and national exports – of the European Union's deforestation regulation and carbon border tax, now due to become law in January. ●

SOUTH AFRICA

Ramokgopa takes a two trillion rand gamble on gas

Published online 19 November

Legal setbacks, stalled offshore projects and a looming supply crisis threaten both industry and climate targets

The Integrated Resource Plan pushed through cabinet by Minister for Energy and Electricity **Kgosientsho Ramokgopa** last month is ambitious in scope and financing – envisaging a 2.23 trillion rand (US$129 billion) investment to reshape the country's energy mix by 2039. Key to the plan is a massive boost to gas usage as a transition fuel – adding some 16,000 megawatts (16 gigawatts) of gas-to-power capacity over the next 15 years. That is an eight-fold increase from the roughly 2GW of open-cycle gas-turbine (OCGT) capacity state-owned utility Eskom operates today.

Yet gas is no panacea. Legal challenges have stalled domestic gas development and the country lacks the infrastructure to import liquefied natural gas (LNG). Coal still fuels 80-85% of South Africa's electricity generation. An ageing fleet of power stations has caused chronic electricity cuts since 2007, costing the country over R1.5trn in lost output.

The policy choices and investments are critically urgent. The industrial sector faces a collapse in gas supply by 2028, threatening 5% of GDP and 130,000 direct jobs. **Mozambique's** Pande and Temane fields – South Africa's sole source of imports – are fast depleting. The government has to diversify its energy mix to plug a widening supply gap – and decarbonise the electricity grid to shield the economy from rising carbon border taxes.

The EU's Carbon Border Adjustment Mechanism (CBAM) puts around 5% of South Africa's exports to the bloc – worth $1.3bn to $2.4bn in 2023 – at risk. The Reserve Bank estimates CBAM could cut EU-bound exports by 4% in 2030, equal to 0.02% of GDP.

Gas, with lower CO2 intensity than coal, is seen as a transition fuel. South Africa – currently the world's 13th-largest emitter – must shift to cleaner sources to meet its Paris Agreement targets.

Nearly six years after TotalEnergies made South Africa's first major offshore gas discovery – Brulpadda and Luiperd, in February 2019 – first production, originally expected in 2026, remains far off.

In 2024, the company withdrew from block 11B/12B off the south coast, citing economic and technical hurdles. The ultra-deepwater site (1,400-1,800 metres), lack of a viable off-take deal and absence of a domestic gas market have stalled development – despite an estimated 3.4trn cubic feet in combined reserves.

While technical constraints played a role, the decisive factors were TotalEnergies' failure to secure a viable off-take agreement and the absence of a functioning domestic gas market. The exit of TotalEnergies and its joint venture partners left Africa Energy as the sole shareholder in block 11B/12B. The company now forecasts first production by 2033.

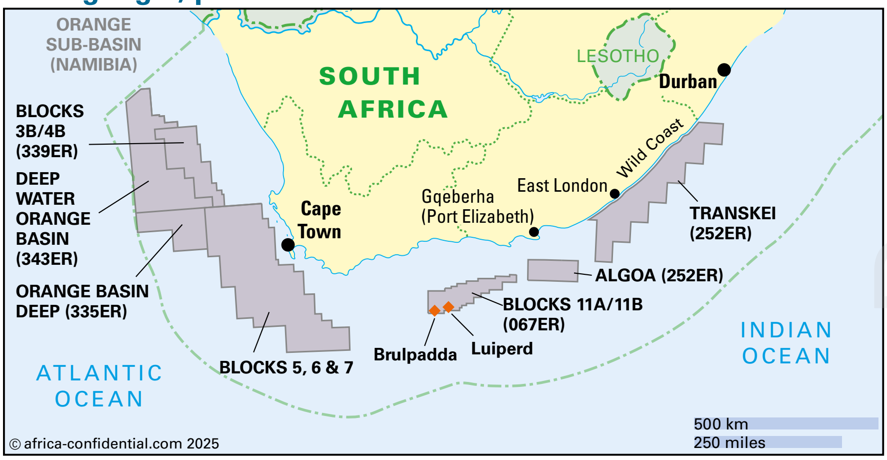
South Africa's stalled progress contrasts sharply with neighbouring **Namibia**, which shares the highly prospective offshore Orange Basin. There, TotalEnergies is targeting a final investment decision for its Venus field in 2026, with first production expected by 2029.

The Constitutional Court in South Africa has yet to rule on a four-year-old case that could set a precedent for all the country's future offshore prospects. In 2021, Shell's right to drill off the Wild Coast was revoked by the High Court, which found its environmental impact assessment and public consultation inadequate. The ruling was seen as a major win for environmental activists, coastal communities, and small-scale fishing and tourism industries along the East Coast.

'CHILLING EFFECT'

Shell and the South African government appealed. In 2024, the Supreme Court of Appeal upheld the finding that the exploration right was granted unlawfully. But it ruled that suspending it entirely was 'too harsh'. The court also warned of a 'chilling effect on foreign investment' from the High Court's conclusion that further oil and gas exploration was incompatible with South Africa's climate commitments. Shell was granted an opportunity to reinstate its right, provided it undertakes a new public consultation.

SOUTH AFRICA'S GAS FIELDS:
Facing legal, political and environmental battles



In October, the Constitutional Court reserved judgement after hearing Greenpeace's counter-appeal against the ruling that Shell's exploration right could be reinstated. Shell has also announced that it will appeal a High Court decision in August to revoke environmental authorisation for block 5/6/7, following a legal challenge from environmental justice groups. The court found the authorisation had failed to consider climate change and impact of a potential oil spill.

Shell took over as successor operator after TotalEnergies exited the block last year when it withdrew from 11B/12B. Yet TotalEnergies is still pursuing offshore exploration in South Africa, but only in the Deep-Water Orange Basin Block (ER 12/3/343), the Orange Basin Deep Block (ER 12/3/335), and block 3B/4B – all adjacent prospects in the Orange Basin. Acknowledging delays in domestic production, the National Energy Regulator of South Africa (Nersa) has said it sees indigenous gas as a cheaper alternative to LNG imports only from 2036 onwards.

LNG IMPORTS

The plan to import LNG carries its own risks. In May, President **Cyril Ramaphosa's** Government of National Unity proposed a 10-year LNG import agreement with the **United States** as part of a broader trade package aimed at securing lower tariffs and trade concessions. But South Africa lacks the infrastructure to import LNG, and the proposal also called for US investment in gas infrastructure and cooperation in key technologies to support domestic production.

Under the plan, South Africa would have imported 75-100 petajoules (3.3-4.4 million m³) of LNG annually – roughly half of its industrial demand of 180-200 PJ.

But Ramaphosa's team failed to secure a deal, and the US subsequently imposed its threatened 30% tariffs on South African exports (**Dispatches 14/7/25** & **22/9/25** & **AC Vol 66 No 16**).

US major Exxon Mobil still says it views South Africa as a top LNG destination. Earlier it had worked with **Dutch** company Royal Vopak to assess a LNG regasification facility there.

Vopak and state-owned Transnet have since been selected to build and operate the country's first LNG terminal at the port of Richards Bay in KwaZulu-Natal, under a 25-year agreement. A final investment decision is targeted in 2026, with operations expected by 2027-2028, according to Vopak.

Given South Africa's bureaucracy and Transnet's history of delays, the facility is unlikely to be fully operational before 2030 and the economics are changing fast. An LNG supply glut expected by 2030 due to new projects coming online in **Qatar**, the US and **Canada** could make LNG imports more viable for South Africa.

The Paris-based International Energy Agency (IEA) has warned that LNG price volatility and changing demand-supply balances could result in LNG terminal overbuild or under-utilisation – as renewables scale up and gas demand falls.

Industrial decarbonisation and CBAM-driven competitiveness pressures could start weighing on gas demand in South Africa in the 2030s. Some in the industry worry that building large, onshore LNG terminals and baseload-oriented gas infrastructure could trap the country with unviable energy commitments.

They argue that it makes more sense to offset the risk of stranded assets by using modular floating liquefaction terminals – such as those planned at Richards Bay and Matola. They supply peaking power and are tied to off-take agreements.

Finding an alternative gas supply is critical. Sasol's Pande and Temane fields in Mozambique, South Africa's only current source of imports, will soon run dry. Infill drilling and a junction compression project has extended their lifespan to 2028 but the country still faces a 'gas cliff' within five years.

MOZAMBIQUE CONNECTION

Mozambique may offer the most feasible regional supply to meet South Africa's gas needs. The fastest solution could be to expand the existing Rompco pipeline and source gas from the offshore Rovuma Basin, from where more supply is expected by the end of the decade. Here **Italian** firm Eni's Coral South floating liquefaction terminal is already operational and set to double its capacity by 2028 with the addition of the Coral North unit.

An LNG import terminal, led by Beluluane Gas Company, in which TotalEnergies is a joint venture partner, is also being developed at the Port of Matola near Maputo. The plan is to permanently moor a floating liquefaction terminal in the bay, then pipe regasified gas into the local network and onwards to South Africa via Rompco.

Off-take agreements are being negotiated with South African industrial users, as well as new gas-fired power plants planned in both Mozambique and South Africa. The terminal aims to be operational by the end of 2027, but the financial investment decision remains pending.

With domestic gas resources expected from the early to mid-2030s, South Africa's fastest route to avert a gas cliff and protect its industry may be LNG imports via Matola or Richards Bay.

But to be viable, these terminals need enough anchor demand. Last year, the Industrial Gas Users Association of Southern Africa tried to aggregate industrial demand and speed up the transactions needed to unlock investment.

Yet the GNU has not provided the fiscal guarantees or regulatory clarity required. As a result, no binding, long-term, multi-buyer off-take agreement has been reached. Without that, the Matola and Richards Bay terminals may never get off the ground. ●

CAMEROON

Biya sworn in as resistance ebbs

Published online 18 November

With state repression in full flow, the pendulum has swung back to the state as oppositionists ponder resignation or armed struggle

The opposition, fixed on the exiled figure of **Issa Tchiroma Bakary**, is beginning to lose heart after President **Paul Biya** was sworn in for his eighth term on 6 November, in Yaoundé. Emboldened by relative calm in Yaoundé, Biya's inauguration speech, on the 43rd anniversary of his accession to power, dwelled on old policies and themes as his security forces carried out a wave of arrests of oppositionists.

For the offence of supporting Tchiroma's presidential bid, state security arrested supporters of his *Front du Salut National du Cameroun* (FNSC) as well as members of **Maurice Kamto's** *Movement pour la Renaissance du Cameroun*, as an atmosphere of fear descended on the country.

Tchiroma's call for 'ghost city' protests foundered among opposition divisions and confusion about timing and which type of protest to prioritise. Many civil society leaders have gone underground or fled abroad in the wake of the protests and government reprisals. About 50 people are reckoned to have lost their lives in the suppression of protests, with about 1,500 detained.

The government will admit only that 13 were killed in Douala and 834 were arrested, which cannot be corroborated (**AC Vol 66 No 21**). The state's backlash against the opposition is centred on Garoua, capital of the North Region and Tchiroma's home town, although Douala, Yaoundé and the towns of the Francophone West region are getting their share.

Security services scour social media for signs of dissent and clues to where to root out opposition voices. After Biya's inauguration, **Biyong Joseph Espoir**, the deputy mayor of Douala, was ordered to explain why he had mounted a passionate defence on a private TV station of the view that Tchiroma had won the election. Tchiroma himself is said to be in Yola, Adamawa State, **Nigeria**, which borders northern Cameroon, ever since he was spirited out of his Garoua home, then encircled by security forces, after Biya's win was made formal by the Constitutional Council. On 9 November he made a video ultimatum to Biya, giving him 48 hours to release all detainees or face a popular revolt.

The government was briefly rattled by the threat, not knowing what Tchiroma might have up his sleeve, and **Paul Atanga Nji**, one of Biya's chief enforcers and minister of territorial administration made a token release of 70 minors detained in Ngoundéré and 36 others held in the western city of Dschang. In the week-ending 15 November A teacher's union threatened to shut schools unless arrested colleagues were released but resistance to Biya's election victory has been inconsistent and uncoordinated.

UP IN ARMS

Many believe the appeal of armed resistance to the regime has increased. **Ben Modo**, a **United States**-based Cameroonian businessman, has announced the creation of the *Forces de Légitime Defense du Cameroun* (FLDC), a militia which aims to force local governments to switch their loyalty to Tchiroma and to oppose arbitrary actions by the police. Other long-time Francophone dissidents in the diaspora, some of them ex-security personnel, are also clamouring for an insurrection.

Observers see the turning of normally docile Francophone citizens into would-be guerrillas as a measure of the depth of the hatred of Biya's regime. As recently as 2018 Ben Modo was a huge government contractor who played a major role in the construction of infrastructure that enabled Cameroon to host the African Cup of Nations football tournament in 2022.

The FLDC wants to make common cause with the armed Anglophone rebels to oust Biya (**AC Vol 66 No 20**). The separatists argue their causes are different, although they acknowledge Tchiroma's win (**AC Vol 66 No 5**). Many of the partisans of 'Ambazonia' resent Francophones ignoring the Anglophone plight when Biya meted out deadly repression on peaceful campaigners for minority rights in 2016 and 2017 (**AC Vol 58 No 11**).

Tchiroma has failed to follow through on the promise of holding a 'real' inauguration for himself. It is felt this could antagonise the Nigerian government and possibly prompt his arrest and/or deportation to Yaoundé. With no support from the African Union and silence from Abuja, Tchiroma is looking further afield for political support, but his options are limited.

On 17 November he appointed the renowned civil rights lawyer **Alice Nkom** as his spokeswoman and we hear he intends to announce a shadow government. There have been rumours of secret diplomacy by **France**, which expressed dismay at the post-election violence while promising not to get involved in any dispute over a transition. The rumours revolve around the notion of co-opting Tchiroma into a job in Biya's government, or offering him a golden handshake over a transitional period.

Biya has frequently co-opted opponents, but this may be less likely with Tchiroma since it already happened after the 1982 coup attempt and he has declared his intent to name a rival administration. Biya is not out of danger yet. He cannot delay arranging his succession any further and that means reconciling multiple conflicting egos in his inner circle and crafting a reshuffle that won't create malcontents who might switch their support to Tchiroma and rob him of breathing space. ●

EU/AU

Brussels pushes Global Gateway to rival US-China deal-making

Published online 13 November

Eurocrats will argue for more transactional policies at the Luanda summit to secure critical minerals. But can the EU's cash match its ambitions?

Africa Union and European Union leaders insist they want to ratchet up economic security ties ahead of their two-day summit starting in **Angola** on 25 November, just after **South Africa's** hosting of the G20. With such a proliferation of geopolitical ties on offer, the EU side will have to work much harder to convince. Two priorities stand out: debt forgiveness and restructuring schemes for Africa and infrastructure contracts for Brussels.

'A unique and strategic relationship that has steadily deepened in scope, ambition, and political significance', claims the draft Joint Declaration that will be released as soon as the meetings finish in Luanda. That proclamation will be news to many African leaders. The EU has not shed its reputation for being slow and inflexible when it comes to accessing funds. Unlike **China** or the **United States** under President **Donald Trump**, it still conditions funding on adherence to 'values'.

Relations between the EU and South Africa are noticeably warmer than a year ago, when EU Commission officials feared that Pretoria had been lost to **Russia** and China, with the two sides working on a so-called Clean Trade and Investment Partnership. In October, the Commission announced that it would invest €11.5 billion (US$13.3bn) in green ammonia, chemicals and mining, and vaccine production in South Africa as part of the arrangement (**Dispatches 13/10/25**).

After its bruising tariff dispute with US President Trump, the Commission is trying to diversify the bloc's trade relations. Yet none of the new trade deals that the Commission wants to finalise are with African states.

Instead, its offer to African economies is centred on its Global Gateway scheme. This is the EU's 'values-based' alternative to the China's Belt and Road Initiative (BRI) but with a fraction of the available finance (**AC Vol 65 No 20**). Over the last ten years

TUNISIA/EU: THE CASE OF SAÏED'S DISAPPEARING SUMMIT

The European Union's €1 billion 'cash for migrant control' deal with **Tunisia's** President **Kais Saïed** has probably been the bloc's unhappiest since being signed in July 2023. The Commission has found Saïed to be an unpredictable and unreliable partner. Saïed's return of a €60 million tranche to the Commission in October 2023, describing the EU's offer as 'derisory' left EU officials completely bemused.

A similar pattern has played out in recent weeks. Days after EU leaders rolled out the red carpet for Egypt's President **Abdel Fattah el Sisi**, with whom the EU has a €7.4bn migration control deal, a bilateral summit with Saïed was put in the calendar by the EU institutions.

Hours later the summit had vanished. No new date has been set. Insiders say that the cancellation was because of an eleventh-hour request for more cash by Saïed's government, though this has been denied by the Commission. ●

the BRI has spent about $1.3 trillion (about $800bn on infrastructure and over $500bn on non-financial sector projects) compared with the Global Gateway's pledged target to raise over $300bn in infrastructure finance, both private and public sector, by 2027.

Yet the Commission sees the Global Gateway as its ticket to the future, as does its diplomatic service, the European External Action Service. The Lobito Corridor, from Angola to **Zambia's** copper fields, was the first example cited by EU Commission President **Ursula von der Leyen** at the Global Gateway Forum in Brussels in October, a two-day event attended by South Africa's president **Cyril Ramaphosa** and **Rwanda's** president **Paul Kagame**, demonstrating that large-scale infrastructural investments attract interest.

With a rail network linking the Lobito Port on Angola's Atlantic coast to the mining heartlands of Zambia and **Congo-Kinshasa**, the corridor 'will cut the journey from the centre of the continent to the port from 45 days to just one week,' Von der Leyen told delegates. With the Lobito port just 500 kilometres down the coast from Luanda, it will be held up at the summit and as a focal point. It combines two priorities in the EU's African strategy; an offer to invest in infrastructure and the EU's search for the minerals to power its green transition.

Success is far from guaranteed. Long stretches of the railway in in eastern Congo aren't working; nor are the trains that are supposed to run on the network. Congolese officials in the Katanga region say they aren't close to running goods trains to service heavy industry that could take on manufacturing and processing.

'Even if they did get the railway running in a reasonable period of time, 14 of the 19 cobalt mines in the area are in the hands of the Chinese,' a senior EU official says. 'Processing in Congo would require massive energy supply and use,' he added (**AC Vol 66 No 21**).

SCEPTICISM

Some senior EU officials privately voice doubts about the design of Global Gateway and the way it is being sold politically. The Commission says that Global Gateway will lead to €150bn of investment across Africa, but less than €10bn is being put up in guarantees in the EU budget. In the case of the Lobito Corridor, meanwhile, most of the money for the $5bn project is coming the US (**Dispatches 10/12/24**).

Most of the Global Gateway cash will, the EU hopes, come from the private sector. The European Investment Bank, the EU's lending arm, says it will coordinate a third of the finance but limits its direct involvement to a few projects. That means that the EU cannot insist on its own companies being awarded tenders for the Global Gateway. It was China's marshalling of its national companies into the BRI that greatly extended its footprint across Africa.

Many worry about the viability of the many green hydrogen projects that the EU is financing in **Mauritania**, **Egypt**, **Namibia** and South Africa. Green hydrogen has become a favoured technology for the EU to promote renewable energy in Africa and develop alternative energy sources to end its dependence on Russian fossil fuels (**Dispatches 27/5/25**).

Whether green hydrogen can be cost effective in the medium-term is less clear. **Germany's** Federal Audit Office warned in late October that replacing natural gas with green hydrogen production would cost up to €25bn. In Namibia, where the EU is financing several green hydrogen projects, the government overstated the job creation potential of green hydrogen by a factor of six, say EU officials. 'There's almost zero understanding of it and the nuances and complexity of it,' one told *Africa Confidential*.

NEW APPROACH

In the current geopolitical realignments – with the EU squeezed between China and the US – Brussels is seen as far too timid. 'The EU is desperately searching for new allies in the Global South who disapprove of the 'mafia-style politics' of the US and Russia,' says **Geert Laporte**, director of the European Centre for Development Policy Management, an influential Maastricht-based thinktank.

Laporte argues the EU should back increased African voting weights in the IMF and World Bank, as well as a permanent UN Security Council seat, even if this weakens Europe's voting power. The EU should also offer ambitious debt restructuring, he adds. African leaders are certain to put debt swaps and other debt restructuring initiatives on the table at the Luanda summit (**Dispatches 20/10/25**).

In Brussels in October, **Ghana's** former president **Nana Addo Dankwa Akufo-Addo** called for the EU to support 'a programme of 'Debt Relief for Green Investment and Resilience': linking debt cancellation to investments in climate adaptation and sustainable growth.' A debt forgiveness programme should be targeted 'to unlock resources for development,' he added (**Dispatches 6/10/25**).

With little public demand in Europe for debt forgiveness – at least nothing comparable to the 'Make Poverty History' campaign two decades ago - EU leaders are not under pressure to make a generous offer. Debt swaps were on the agenda at the COP30 climate summit in **Brazil** and are supported by EU leaders, but the sums involved will be in the hundreds of millions or low billions of dollars.

In 2024, debt repayments by African countries were more than $20bn higher than the amounts of new debt created, a negative debt flow that increases the fiscal pressure on African treasuries. 'One of the things we're missing a trick on in Europe is recognizing the debt problem,' says **Barry Andrews**, an **Irish** MEP who chairs the European Parliament's Development committee.

Andrews adds that a European offer on debt would strengthen claims of China's 'debt trap diplomacy' in Africa. On migration control, the EU's main preoccupation for the last five years, the Commission favours bilateral deals with countries to increase the mandate of Frontex, the EU's border agency. **Senegal** is the next on the Commission's wish list. Pharmaceutical production and health and medical regulation are also likely to be prioritised.

The Commission wants Global Gateway to finance vaccine production and health infrastructure, aiming to help the African Union target of manufacturing 60% of routine vaccines by 2040. 'Together, the two continents are working to ensure that all Africans can access safe, effective, and affordable medicines and vaccines quickly,' the EU and AU said in a joint statement following a pre-summit meeting between officials in Pretoria in early November.

'The way Europe is perceived is quite negative, frankly,' says a senior EU official. The political will – at least rhetorically – for the EU to prove itself as Africa's 'reliable partner' exists. But its plans look slim compared with many of the alternatives on offer (**AC Vol 66 No 6**). ●

MOZAMBIQUE/US/FRANCE

President Chapo returns empty-handed from Houston

Published online 12 November

ExxonMobil won't recommit to its gas export scheme until Maputo agrees resumption terms with TotalEnergies

Over US$50 billion of gas investments are riding on the outcome of a financial fight between President **Daniel Chapo's** government and France's TotalEnergies Chief Executive **Patrick Pouyanné**. The question now is who will have the upper hand: neither Mozambique nor the big oil and gas companies can afford to walk away from the project.

President Chapo had hoped to use his 26–30 October visit to the United States to force Pouyanné's hand. His team calculated that this his visit to ExxonMobil's headquarters in Houston, after some gladhanding with US Vice-President **JD Vance** in Washington DC, would yield a public commitment from the US oil giant to its long-delayed Rovuma LNG project. And that should have encouraged TotalEnergies to speed up its return to work on the project.

Instead, the Houston meeting failed to deliver, and a joint press conference was cancelled. The stumbling block was the government's fight with TotalEnergies over the terms of its resumption of work on Mozambique LNG. TotalEnergies declared force majeure and suspended work on the LNG project in Cabo Delgado Province in March 2021 citing the risks of militant attacks. Chapo's delegation had left Mozambique for the US days after being blindsided by the leak of a TotalEnergies letter that revealed its demands for lifting the force majeure. Angered by the leak, Maputo considers the demands excessive.

In early October, a team led by **Ricardo Xavier Sengo**, Minister in the Presidency for Civil Affairs, planned Chapo's US visit. The President was assured that ExxonMobil's Chief Executive **Darren Woods** would make a joint announcement with him, signalling the company's decision to move ahead with the Rovuma LNG project, a $30bn investment, the largest of Mozambique's gas ventures (**AC Vol 66 No 1**).

With tensions rising between Maputo and TotalEnergies over the preconditions, Chapo saw his US trip as an opportunity to pressure the French company. The government calculated that a joint announcement with ExxonMobil would isolate TotalEnergies, forcing it to soften its stance (**Dispatches 14/7/25**). The government already enjoys the backing of **Italy's** Eni, which operates the Coral Sul and Coral Norte floating LNG projects. It has continued operating in offshore Cabo Delgado despite the security risks.

ExxonMobil's Rovuma LNG and TotalEnergies Mozambique LNG are separate ventures, they are expected to share logistical infrastructure at Afungi, which will be built as part of the Mozambique LNG project. Without a final agreement between TotalEnergies and the government, ExxonMobil's executives said they could not make an investment commitment, a decision that has been postponed since 2019.

The two projects are tied together: in one of its biggest ever international commitments, US Eximbank agreed in March to provide $4.7bn of financing for the TotalEnergies Mozambique LNG project which will be used to pay US contractors and equipment suppliers on the onshore project as well as provide infrastructure for ExxonMobil's planned offshore project. A more positive sign for Chapo was an assurance that the ExxonMobil Chief Darren Woods gave to shareholders about the future of the Rovuma project despite the awkward meeting with Mozambique's team earlier.

TOTAL IMPASSE?

Negotiations between Maputo and the French company have stalled since September, primarily due to disputes over cost recovery and contract extensions. TotalEnergies has presented a $4.5bn bill for costs incurred during the *force majeure* period. It is also demanding a ten-year extension to its exploration and production concession to compensate for the four-and-a-half-year suspension triggered by the March 2021 jihadist attack on Palma.

President Chapo and his advisors believe TotalEnergies leaked the letter sent to the Presidency to pressure the government into accepting its terms. The letter was circulated to diplomats, journalists (including *Africa Confidential*) and businesses a day after it was sent to Chapo.

The newly appointed Director for Institutional Communication in the Presidency, former journalist and lawyer **Ericino de Salema**, told editors in Maputo that the letter was leaked by TotalEnergies.

Given that the position of TotalEnergies Chief Executive Patrick Pouyanné depends on relaunching the Mozambique LNG projects on the most profitable terms to the company, officials in Maputo see the leaking of the letter as part of the pressure to get them to pay the extra costs during force majeure but also to complicate Chapo's negotiations

INSURGENTS REFINE HIT-AND-RUN TACTICS TO AVOID FOREIGN TROOPS

The main dispute between President **Daniel Chapo's** government and TotalEnergies Chief Executive **Patrick Pouyanné** focuses on the French company's compensation claims and demands for an extension of its production and exploration licences. Yet the reason for TotalEnergies declaring force majeure in 2021 – the jihadist insurgency in Cabo Delgado – continues to threaten the communities in the region. The oil, gas and construction workers on the TotalEnergies project are assured of security by operating behind a 'green zone' security perimeter covering operations at Afungi, guarded by foreign security companies and drone surveillance. Several local communities have been relocated and the oil workers aren't allowed to leave the green zone which offers extensive modern facilities.

A successful attack on the heavily fortified Afungi site is unlikely. It is guarded by **Rwandan** soldiers (financed via an opaque mechanism involving the governments of Mozambique, Rwanda and France, as well as Total Energies).

Mozambique has retrained its counter-insurgency forces, deployed naval assets against ocean-based threats and sent in its own private defence companies, which partner with **South African** and Rwandan companies. But insurgents could still target the gas installations.

Their recent attacks against targets in the district capitals of Mocímboa da Praia, Palma, Macomia and Nangade suggest the *Ahlu Sunna Wal Jama'ah* militants have adapted to the presence of foreign troops. They have learned to bypass Rwandan and **Tanzanian** defence patrols, as well as Mozambican forces. This allows them to strike and quickly withdraw.

On 14 October, insurgents killed and decapitated an off-duty Rwandan security guard employed by ISCO Segurança, the leading regional firm protecting the Mozambique LNG site. ISCO Segurança is a subsidiary of Rwanda's ISCO Security (**AC Vol 66 No 18**). A third of it is owned by Cabo Delgado businessman **Yacub Osman's** family, key financiers of the ruling Frelimo party and close allies of former Police Commander-General **Bernardino Rafael**, a prominent member of the Makonde ethnic group. We hear that Bernardino and his business allies are at odds with the Chapo government.

By attacking the ISCO employee at his house, the insurgents were sending a message to investors in the Mozambique LNG project as well as Frelimo's network of Makonde securocrats which brought in their Rwandan counterparts.

It also shows that the insurgents have adjusted to foreign military forces brought in four years ago. Militants now operate in smaller, more agile units but can inflict lethal damage on both civilians and security forces.

The reshuffles in Mozambique's Defence and Security Forces ordered by Chapo since taking office in January have had little visible impact on the insurgents. He replaced several senior Makonde commanders with officers from other ethnic groups unconnected to Cabo Delgado but the insurgents haven't relented.

For most of the conflict, **Bernardo Lidimba**, a Makonde, headed *Serviço de Informações e Segurança do Estado* (SISE) Gen Bernardino Rafael, a Makonde, commanded the police. Commander-in-Chief of the Defence and Security Forces was then-President **Filipe Nyusi**, also Makonde.

All three men left their posts within three months of each other. Lidimba was killed in a car crash in November 2024, Nyusi left office in January and Rafael was dismissed later soon afterwards. They have since been replaced by officials from other ethnic backgrounds. Chapo also replaced the Chief of the General Staff under the Nyusi administration, **Joaquim Rivas Magrasse**, with the veteran officer **Julio Jane**.

These reshuffles angered some of the Makonde elite and may have lessened corruption but have done little to boost the counter-insurgency power of Mozambican forces. As the insurgents regain mobility, Maputo's high-level personnel reshuffles haven't addressed the structural weaknesses of its counter-terrorism operations. The government's reliance on foreign military support, especially Rwandan officers, irks neighbours such as Tanzania and South Africa. It also underscores national forces' inability to secure Cabo Delgado on their own, 50 years after independence. ●

in the US.

Two weeks after TotalEnergies announced the lifting of the *force majeure*, the Council of Ministers had met twice without approving an updated plan for the Mozambique LNG project and the extra costs requested. Without agreement on this, the TotalEnergies' project remains stalled. ●

GUINEA

Simandou finally opens

17 November

Government hopes China-controlled iron ore mine will catalyse a national transformation

Ministers plan to use revenues from the recently opened Simandou iron ore mine to underpin Guinea's first sovereign wealth fund, aiming to have it operational by the second quarter of 2026 with an initial US$1 billion. Planning Minister **Ismaël Nabé** says that the government has been advised by **South Africa** and **Singapore** on how to run the fund, which will be modelled on Singapore's Temasek and **Malaysia's** Khazanah.

Developed by mining companies Winning Consortium Simandou, Baowu, Chinalco and Rio Tinto, Simandou includes a 650 km dual-track railway and a deep-water port at Moribaya. (**Dispatches 27/10/25**). **China** owns 75% of it and Vice-Premier **Liu Guozhong** attended the inauguration ceremony on 11 November.

Officials are optimistic about the potential of Simandou, which has the world's largest untapped iron ore deposits. The $20bn operation is targeting annual production of 120 million metric tons of high-grade ore. That would make Guinea a top iron ore exporter and, according to the International Monetary Fund, produce revenues equivalent to 3.4% to gross domestic product between 2030 and 2039.

The mine is vital to the military junta, led by Colonel **Mamady Doumbouya** since 2021, in its bid to counter international criticism and boost public support (**AC Vol 63 No 1**).

Djiba Diakité, President of the Simandou 2040 Strategic Committee, has described the project as the 'driving force behind a national transformation'. The authorities are hopeful its revenues can be used to attract private investment into education, infrastructure and agriculture.

ECONOMY/ENVIRONMENT

World Bank steps into Kenya's booming real estate sector

17 November

Plan to use debt and public-private financing may prompt other governments to change tack on widening housing deficit

A US$1.35 billion public-private financing plan by the World Bank for **Kenya's** property market reflects the sky-rocketing demand for housing in Africa, the fastest urbanising continent. Over 40,000 people a day are moving to Africa's cities; over half of the continent will be urbanised by the early 2030s with Africa's popular projected to grow to 2.4 billion by 2050.

The Bank's plan, which support Kenya's state-owned Mortgage Refinance company, aims to diversify financing sources and includes some innovative ideas to restructure some of the country's sovereign debt (**AC Vol 66 No 21**).

Kenya's housing deficit is running at over 2m units, with demand growing at 250,000 units a year. Over 50% of city dwellers live in informal settlements such as Kibera and Mathare Valley.

Among the big five real estate sectors in Africa, Kenya's market is one of the most diversified, combining offices, retail space, logistics, tourist accommodation and a fast-growing residential sector, according to UN Habitat and the International Finance Corporation (IFC), the World Bank's commercial arm. Of the other, **South Africa** is seen as the most developed property market, making up just over a quarter of Africa's formal real estate sector.

With a large domestic market (over 119m people with 20m in Cairo and suburbs alone) and an aggressive state-driven urban development plan with new cities along the Nile and fringes of the desert, **Egypt** has about 15% of Africa's real estate market.

Housing demand – estimates of a deficit of 28m units – is highest among **Nigeria's** over 230m people and fast-growing cities: Lagos, Port Harcourt and Abuja. Alongside, Kinshasa and Cairo, Lagos is one of Africa's fastest-growing megacities: all have populations of over 20m each. Dar es Salaam is projected to become a megacity with over 10m people by 2030 (**AC Vol 65 No 22**).

Policymakers may see the Bank's $1.35bn project in Kenya as a template to counter obstacles caused by weak planning, infrastructure bottlenecks, excessive land-use laws, and outdated housing finance systems that are seen as holding back expansion (**AC Vol 64 No 22**).

NIGERIA

Art museum opening derailed by protests and Benin Bronze dispute

17 November

In the latest row over the artefacts, Edo State has revoked the new museum's planning application

Instead of opening its doors on 10 November, the Museum of Western African Art (MOWAA) in Benin City appears to be on the brink of collapse. A glossy launch event for the museum was derailed after demonstrators broke into the building, forcing more than 250 guests to hide for several hours.

Subsequently, Edo State Governor **Monday Okpebholo** revoked the licence for the land on which MOWAA was built. His office says this is because in the planning application the museum referred to itself as the Edo Museum of West African Art, but it later dropped the reference to 'Edo'.

This is the latest in a series of disputes in Edo State over the MOWAA project, which is thought to have received up to US$20 million in funding, including from the **German** and **French** governments and the British Museum (**AC Vol 66 No 4**).

The museum's centrepiece was supposed to be the famous Benin Bronzes that were looted by **British** colonial soldiers in 1897, but that caused a major row. A group around the Oba of Benin, **Omo n'Oba n'Edo Uku' Akpolokpolo Ewuare** II declared the bronzes belonged to him, not to Edo State government, a claim that was backed by Governor Okpebholo and President **Bola Ahmed Tinubu** (**AC Vol 65 No 23**).The protestors claimed MOWAA had previously misrepresented itself as the Benin Royal Museum without the authority of the Oba of Benin.

EGYPT/QATAR

Doha pledges $30bn for Sisi's tourism project

10 November

Deal is latest example of increasingly warm ties between Egypt and Qatar

A US$29.7 billion investment from Qatar's sovereign wealth fund to develop a major real estate and tourism project on Egypt's Mediterranean coast is the latest evidence of close ties between Doha and Cairo.

Egypt will receive $3.5bn upfront as part of the deal, a major boost to the finance ministry's coffers. Prime Minister **Mostafa Madbouly** said that the project on 20 square kilometres plot in the Alam Al-Roum area of Matrouh province would create up to 250,000 jobs during construction and operation.

After a freeze between 2017 and 2021, primarily because of Al Jazeera coverage of Egypt, diplomatic relations between Cairo and Doha have been increasingly close. Both were involved in mediating October's ceasefire in Gaza.

In recent years Gulf states have been the largest investors in Egypt's northern coast, putting in $59bn since 2021, according to real estate consultancy Knight Frank.

As part of that, Qatar has agreed to invest billions of dollars into Egypt (**Dispatches 22/10/24**). In return, Cairo has offered generous tax and customs incentives to Qatari firms, opening up markets in transport, logistics, food security, industry and renewable energy.

More deals are expected on 10 November when Cairo hosts an Egyptian-Gulf trade and investment forum.

KENYA/SENEGAL/IMF

Loan talks drag on

10 November

No agreements reached after latest IMF staff missions

Kenya and Senegal both continue to experience slow progress towards agreeing new lending arrangements with the International Monetary Fund.

Yields on Senegal's Eurobond loans jumped 24 basis points to 13.2% on 7 November after a two-week IMF staff mission ended without a new package (**Dispatches 27/10/25**). President **Bassirou Faye's** government has been pushing for a fresh credit facility ever since the IMF halted a US$1.8 billion programme last year when auditors discovered more than $7bn of hidden liabilities.

The IMF has praised the government's plans, which include new taxes on gambling and mobile money transactions, pointing to 'notable progress' on debt management, though it has warned that the 'the very high tax revenue expected from the announced measures constitutes a significant risk'.

In Kenya, talks on replacing loan programmes that expired in April are also moving slowly. Following the latest staff mission, government officials said discussions are likely to extend into 2027, an election year.

One of the main points of contention is whether securitised loans, which President **William Ruto's** government wants to use to fund infrastructure projects, including renovation of the main airport in Nairobi and extending a Standard Gauge Railway to **Uganda**, should be treated as sovereign debt.

Though the immediate pressure on Kenya's public finances has eased, and the central bank has boosted currency reserves to the level of more than five months of imports, the Finance Ministry's debt service payments remain high (**AC Vol 66 No 8**)

'If it comes, it will be a windfall for us… It may help us reduce some other loans, whether domestic or external,' Treasury Cabinet Secretary **John Mbadi** told journalists on 4 November about the prospect of IMF support.

SUDAN

Burhan under pressure after Hemeti backs US ceasefire plan

10 November

SAF highlights RSF atrocities in bid to regain advantage

General Abdel Fattah al Burhan's Sudan Armed Forces (SAF) are under pressure to agree to the **United States'** plans for a humanitarian ceasefire after the Rapid Support Forces of Gen **Mohamed Hamdan Dagalo 'Hemeti'** welcomed the plan.

RSF said that they looked forward to 'immediately commencing discussions on the arrangements for a cessation of hostilities and the fundamental principles guiding the political process in Sudan'.

The US, along with Saudi Arabia, the United Arab Emirates and Egypt, has called for a three-month humanitarian truce, to be followed by a permanent ceasefire (**AC Vol 66 No 19**).

The SAF are anxious not to be outmanoeuvred in the propaganda battle, and to maintain its control over a post-war government. As a result, Sudan's ambassador to Kenya Kamal Gubara held a press conference in Nairobi last week to detail the scale of the atrocities, particularly mass killings, committed by the RSF in and around El Fasher, the city in Darfur captured by Hemeti's forces last month (**AC Vol 66 No 22**).

The seizure of El Fasher in Darfur, following a two-year siege, adds to RSF's control of West and Southern Sudan, and so has increased the prospects of Sudan breaking up. While there is no international recognition for the parallel regime announced by Hemeti in March, there is already de facto partition, with the SAF strengthening its control of Khartoum.

The SAF insists that it will not negotiate with the RSF, and that the international community must classify it as a terrorist organisation. Sudanese officials have also been angered by **Kenyan** President **William Ruto's** close relations with Hemeti. ●

POINTERS

Kenya/EU

CHEMICALS IN COURT

At the Environment and Land Court in Nairobi on 13 November, justices began hearing a landmark lawsuit seeking to ban multinational manufacturers and local distributors from placing toxic pesticides, already banned in Europe, on the Kenyan market (**Dispatches 7/3/23**). The suit targets glyphosate, Paraquat, Imidacloprid, Clothianidin, Fipronil, chlorpyrifos, thiacloprid, thiamethoxam, fenitrothion and dinotefuran, according to court papers, with Monsanto Kenya, Bayer East Africa, Twiga Chemical Industries, Syngenta Agrochemicals, and BASF East Africa all named.

Listing more than 70 pesticides currently sold in Kenya despite being banned in Europe and **China**, the petition argues that farmers and consumers are being exposed to 'lethal chemicals without adequate warnings'. In September, Kenya's High Court ruled that public interest litigation on environmental and health matters related to the use of Highly Hazardous Pesticides is protected under the national constitution.

A report by Swedwatch, a **Swedish** NGO, and the Kenya Organic Agriculture Network earlier this month cited rising cancer rates in rural communities and several deaths of farm workers from poisoning. In June, the Kenyan government banned 77 pesticide products after concluding they posed a threat to human health. But the market remains large. In 2022, the EU exported an estimated 122,000 tonnes of pesticides banned from use on European farms. EU rules require any firm wishing to export such chemicals across the EU-27 to submit an 'export notification' detailing the reasons for the ban, intended uses and shipment volumes. The issue poses a challenge for Europe, a major importer of Kenyan produce. EU customs officials intercepted increasing volumes of produce containing banned chemicals from Kenya in 2023 and 2024.

CAR/France/Belgium

HARD LABOUR

Arrested on 26 May 2024 in Zémio, in the south-east of the country, by Wagner paramilitaries, **Joseph Figueira Martin** was beaten and tortured before being imprisoned at Camp De Roux in Bangui for 17 months (**AC Vol 65 Nos 17**, **23** & **Vol 66 No 6**). After 17 months in detention, he was tried and, on 4 November, sentenced to 10 years' hard labour and a fine of 50 million CFA francs (US$81,000) for undermining state security and criminal association. The Wagner militia has a clear objective in arresting this Belgian-**Portuguese** citizen: to limit the presence of foreign humanitarian workers in the country, and to avoid denunciations of the human rights violations it commits.

For the Central African justice system, which operates under orders, the conditions of his arrest and detention are irrelevant – as is the lack of substance in the indictment. The trial illustrates the extraordinary weakness of the Central African judicial institutions and their inability to comply with basic investigative standards and the criminal procedure code. It also indicates that France, the only European country with an embassy in Bangui, has lost interest in the case, leaving the Belgian ambassador in Yaoundé and the EU ambassador in CAR to defend the detainee's rights.

Thanks to the mobilisation of his family and the NGO Protect Humanitarians, chaired by **Olivier Vandecasteele** (himself arrested in 2022 and arbitrarily detained for 15 months in **Iran**), the European Parliament voted in July to condemn the arbitrary detention of Martin. The European press also took up his case. There are now several possible scenarios. A presidential pardon and expulsion are not impossible, especially as President **Faustin-Archange Touadéra's** regime remains short of cash a few months before the elections – and the EU is the country's main donor.

Some Central African activists envisage another tactic: that the Belgian police could investigate the Touadéra clan's businesses in Belgium and obtain prosecutions against them. A Belgian law passed in 2023, which led to the release of Vandecasteele, allows for prisoner exchanges.

TANZANIA: THE POWER BEHIND SAMIA'S THRONE

The technocrat and the party hack – that is the early assessment of new Prime Minister **Mwigulu Nchemba** and Vice-President **Emmanuel Nchimbi**, the two men tasked with fronting President **Samia Suluhu Hassan's** efforts to heal the wounds left by the state's killing of hundreds of its citizens following the 28 October polls (**AC Vol 66 No 22**).

Both are in the cabal of officials who have Hassan's ear and who masterminded the post-election repression. The speed and scale at which the government lost control on the ground after claiming that Hassan had won 98% of the vote on an 87% turnout shocked not only Tanzanians but the wider region. Attacks on foreigners – particularly those from countries such as **Kenya** and **Uganda** – have further damaged the country's regional standing.

Nchemba spent three years as Deputy Secretary-General of the ruling *Chama Cha Mapinduzi* (CCM) party before his first ministerial post in 2015, and is understood to harbour presidential ambitions of his own. He is seen as a technocrat having served for almost a decade in the governments of presidents **John Magufuli** and Hassan, latterly as Finance Minister since 2021. He was not the obvious choice. **Dotto Biteko**, a former Deputy Prime Minister, and National Assembly Speaker **Tulia Ackson** had both been in the running. Ackson – who is not seeking re-election as Speaker and has long been a close ally of Hassan's – is set to secure a senior ministerial post.

The economy was a bright spot in Hassan's first four years – growth and tax collection consistently exceeded projections, earning plaudits from the IMF (**AC Vol 66 No 13**). The president may bet that lavish infrastructure spending will deliver an economic boost big enough to make Tanzanians forget the election-day slaughter – with activist deaths reportedly in the thousands.

Hassan has promised to release more than 500 youth protestors detained on treason charges and to create a dedicated Gen Z ministry, along with a special unit in the president's office to expand job opportunities for young people. Nchimbi insists that Tanzania is 'safe, stable, and open to visitors from around the world' and that the new administration will move swiftly to begin a 'process of reconciliation so that even the minority can be heard'.

After serving in **Jakaya Kikwete's** government as Home Affairs Minister, Nchimbi held several ambassadorial posts during the Magufuli era before being brought back by Hassan in January 2024 to become Secretary-General of CCM (**AC Vol 55 No 4**). Nchimbi's control of the party machinery explains why he was made Hassan's running mate. But Nchimbi also has close links to the security apparatus. His ally **Suleiman Abubakar Mombo** has been Director-General of the Tanzania Intelligence and Security Services since last July and has emerged as one of Hassan's closest advisors (**AC Vol 65 No 15**). ●