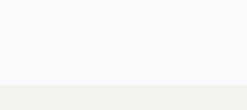




## Med-Or Monthly **AFRICA REPORT**



**JUNE**  
**2026**

### **EDITOR'S NOTE**

This month Washington and Tehran signed a Memorandum of Understanding to cease hostilities. The central question is how new US-Iran détente reshapes the broader Middle East - and with it, the web of relationships that Gulf states have carefully woven across the Horn of Africa region, where they spent the better part of a decade extending their economic and political reach. The picture is uneven. States whose economic lifelines run through the Strait of Hormuz, including the UAE and Qatar, find themselves newly exposed. Saudi Arabia, by contrast, holds a structural advantage: the ability to redirect trade flows through the Red Sea.

That strategic reality is already reshaping Saudi priorities. The pivot away from capital-intensive vanity projects - NEOM chief amongst them - toward Red Sea critical infrastructure, signals a reorientation with direct consequences for Africa's eastern coastline. This increases the urgency for increased security and better integration. The early signs are visible: Washington's move to lift sanctions on Eritrea, brokered in no small part by Riyadh, and the possibility of Sudan peace talks returning to the Saudi capital with American backing.

Israel, meanwhile, is pursuing its own interests in this region. Its recognition of Somaliland — and this month's official visit by President Abdirahman Mohamed Abdullahi to Tel Aviv — has very little to do with Somaliland's quest for independence. This move has angered Mogadishu, Djibouti, the African Union and the broader Arab and Islamic world alike. Tellingly, neither the UAE nor Ethiopia, both close Israeli partners, have followed suit. The calculation instead is squarely strategic: Somaliland's position commands the approaches to Bab-el-Mandeb, mere miles from Houthi-controlled territory in Yemen. This is why many observers worry that, with Israel's setbacks in its confrontation with Iran and mounting US pressure to wind down operations in Lebanon, Tel Aviv may seek to use its new foothold in Somaliland - not merely to bolster the local government, but as a platform to be able to confront the Houthis directly should that be necessary.

Meanwhile, as with the war against Iran, the world's attention remains focused on the Strait of Hormuz, the Bab el-Mabdeb's importance cannot be overstated. Hormuz is narrower and deeper, and through it passes the world's largest concentration of energy trade. The Bab-el-Mandeb, on the other hand, is broader but shallower yet accounts for twice the share of containerised goods traded through Hormuz. The underwater data dimension is equally consequential: the cables transiting through the Bab-el-Mandeb carry roughly 18% of the world's internet data. Sixteen cables connecting Asia to Europe pass through these waters, landing at Djibouti, the most concentrated submarine cable hub in Africa. Here lies a critical asymmetry: disruptions to data cables in the Strait of Hormuz affect primarily the GCC and Western Asia - damage in the Bab-el-Mandeb reverberates across Africa, Europe, and Asia simultaneously.

The Hormuz closure has also left a slower, quieter wound on the continent that deserves equal attention. Roughly a third of the global trade of fertilizer raw materials passes through the strait, and the disruption sent urea prices soaring by some 46% between February and March alone — arriving at the worst possible moment in Africa's agricultural calendar. Sudan, Somalia, Kenya, Tanzania and several landlocked Sahelian states have been amongst the hardest hit. The reopening of the strait, while welcome, is unlikely to salvage the 2026 planting season: pricing remains elevated, and farmers have already made irreversible decisions. What the crisis has clarified, with uncomfortable precision, is that fertilizers are as strategically consequential as oil - and that Africa's food security is as exposed to geopolitical shocks in the Gulf as its energy supply.

These compounding vulnerabilities make the energy transition imperative all the more urgent. The lessons of this turbulent period reinforce what we argued last month: with the exception of the continent's energy exporters, African nations can insulate their energy systems from external shocks through accelerated investment in renewables. Pakistan offers the most instructive global model; within Africa, Ethiopia is emerging as the continent's own benchmark together with Kenya. The challenge remains the borrowing costs in Africa, which run three times higher than in advanced economies - a structural inequity that is hampering renewable energy investments.

These compounding vulnerabilities point to a single conclusion: transformative infrastructure must become the organizing principle of cooperation and integration on the continent. This conviction shapes our daily work at Med-Or. Just this June, we concluded an in-person training in Italy for 30 cyber officers from nine African countries, delivered with Italy's National Cybersecurity Agency and Leonardo's Cyber Academy. We took part in the Africa Finance Corporation-Italy Forum, working alongside Zambian, Italian, and European institutions to advance mining partnerships along the Lobito Corridor. And, mindful of Djibouti's outsized role as Africa's submarine cable hub, we traveled there to engage with stakeholders on the future of its maritime and underwater infrastructure.

The task ahead is to build Cybersecurity Operations Centers within Africa, where trained officers can operate with increased efficiency and effectiveness; to support new undersea infrastructure that can help diversify Africa's digital and electrical connections (while also requiring protection in turn); and to help Africa develop its own AI data centers. Africa cannot risk becoming a mere consumer of AI built elsewhere. It must act as an active participant in shaping AI that reflects African needs. Capacity-building and soft power alone have proven insufficient - past experience shows as much. Alongside capacity, there must be real infrastructure: a far more daunting undertaking, but an essential one. This is why Med-Or's focus extends beyond training, with an eye on the larger goal: helping to design and bring together public-private tools, together with African countries, to create investments that can bring real change across the

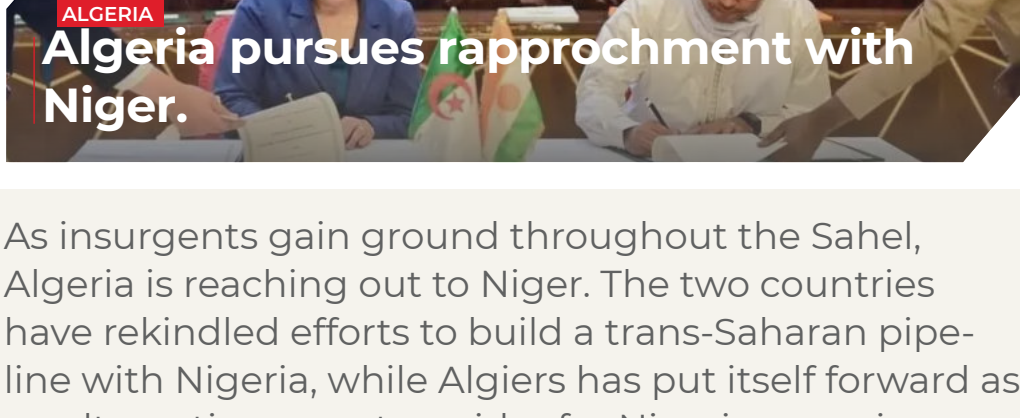
**Umberto Tavalato**

Executive Director,

Med-Or Italian Foundation for Africa

## UPDATES

### NORTH AFRICA



#### ALGERIA

## Algeria pursues rapprochement with Niger.

As insurgents gain ground throughout the Sahel, Algeria is reaching out to Niger. The two countries have rekindled efforts to build a trans-Saharan pipeline with Nigeria, while Algiers has put itself forward as an alternative export corridor for Nigerien uranium. Algeria's ties with Niger had soured after the Niamey junta rebuffed Algerian offers to mediate between it and ECOWAS after the 2022 coup. As Niger struggles to stem jihadist advances, however, its need for alternative partnerships may soften its stance.

### LIBYA

## Tuareg rebels find safe haven in the Fezzan

The National Front for the Liberation of Azawad (FLA) is reportedly using southern Libya as a staging ground for its campaign against the government of Mali. FLA fighters have set up bases in the vast reaches of the Fezzan as part of a logistics chain straddling Libya, northern Niger, and Mali. The FLA and its jihadist allies profit from weak State control in the area, which has become a refuge for Sahelian and Libyan rebel groups.

### LIBYA

## EUNAVFOR IRINI loses security council mandate

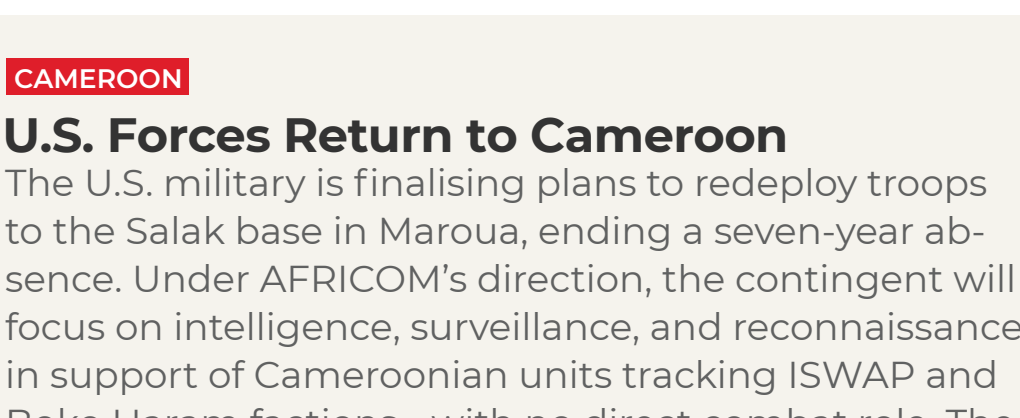
The EUNAVFOR IRINI naval mission lost its UN mandate after the Security Council failed to renew its authorisation under Resolution 2780, which allowed participating member States and regional organisations to conduct inspections on vessels suspected of smuggling arms in Libyan waters. As penholders on the issue, Greece and France did not request renewal within the due date. The mission will continue operations under a parallel European Union mandate.

### TUNISIA

## Anti-Migrant sentiments grow throughout North Africa

Hundreds of Sudanese refugees were arrested at Tobruk, al-Butnan and other eastern Libyan cities by order of the Government of National Stability (GNS), who transferred them to the Kufra detention centres where approximately 193,000 Sudanese nationals are already held. In Tripoli, meanwhile, several associations and grassroots movements staged anti-immigration protests and called for the expulsion of UNHCR from Libya. Xenophobic sentiments are also rising in Tunisia, where president Kais Saied has been actively voicing fears of "ethnic substitution" of North African Arabs by black Africans.

### WEST AFRICA AND THE SAHEL



#### NIGER

## Deadly attack at Niamey's airport

On June 18, a coordinated attack struck Diiori Hamani International Airport in Niamey. Niger's defence ministry reported 22 attackers, 11 soldiers, and two civilians killed; JNIM, al-Qaeda's Sahel affiliate, claimed responsibility. The strike, the second such incident in under five months, hit a critical national infrastructure and signalled once again JNIM willingness and ability project force into urban centres, threatening the credibility of the military junta's capacity to ensure safety in the capital.

### CAMEROON

## U.S. Forces Return to Cameroon

The U.S. military is finalising plans to redeploy troops to the Salak base in Maroua, ending a seven-year absence. Under AFRICOM's direction, the contingent will focus on intelligence, surveillance, and reconnaissance in support of Cameroonian units tracking ISWAP and Boko Haram factions - with no direct combat role. The move fills the surveillance gap left by the 2024 closure of the Agadez drone hub in Niger, and complements a parallel deployment of personnel and drones already operational at Bauchi Airfield in northeastern Nigeria. Taken together, the Maroua and Bauchi deployments reveal a coherent AFRICOM strategy: rather than a large footprint, Washington is rebuilding its ISR architecture across the Lake Chad Basin through smaller nodes.

### BENIN

## Benin and Niger Advance Reconciliation Process

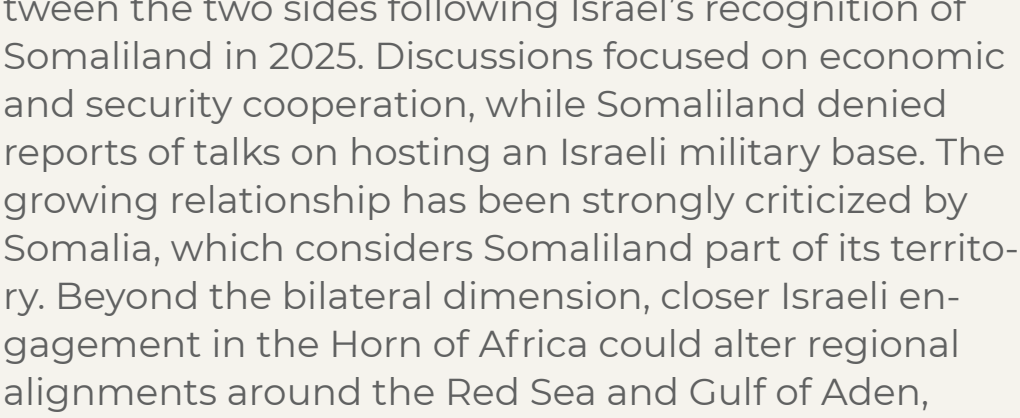
Following high-level talks, Benin and Niger released a joint communiqué this month affirming their commitment to reopening their shared border, closed since the July 2023 coup in Niamey, and to rebuilding broader bilateral cooperation. The rapprochement carries significant weight: restoring the border would partially ease Niger's landlocked vulnerability, reopen a key trade and transit corridor, and test whether ECOWAS-aligned states can rebuild pragmatic relationships with the junta governments.

### GHANA

## Ghana's President on a State Visit to Belarus

In early June, President Mahama travelled to Minsk for a state visit focused on deepening bilateral ties, with agreements signed covering economic, agricultural, and technical cooperation in line with his industrialisation and food security agenda. Ghana is also the only West African country having signed a Defense and Security Partnership with the EU, which grants it access to military equipment through the European Peace Facility. This confirms Ghana hedging international strategy vis-a-vis the West and Russia.

### EAST AFRICA AND THE HORN



#### ETHIOPIA

## The Expected Victory of Prime Minister Abiy's Party in Ethiopian elections

Ethiopia held general elections on 1 June, confirming the dominance of Prime Minister Abiy Ahmed's Prosperity Party. Despite concerns that prevented voting in Tigray and disrupted polling in parts of Oromia and Amhara, regional organizations such as the African Union and IGAD praised the overall conduct of the election. By securing a parliamentary majority, the ruling party reinforced its political mandate and positioned Abiy to remain in office for another term. Nevertheless, questions persist on the future balance between central authority and Ethiopia's federal system, particularly in Tigray. Meanwhile, the US imposed sanctions on some high-profile members of the TPLF, which shows how Addis Ababa is effectively isolating the Tigrayan leadership in the international arena.

### KENYA

## US-backed Ebola infrastructure in Kenya

Amid the Ebola outbreak in the DRC, the US and Kenya agreed to establish an Ebola quarantine facility at Laikipia Air Base for evacuated American citizens. In return, Washington pledged \$13.5 million to strengthen Kenya's Ebola preparedness. The agreement triggered protests and legal challenges, with critics questioning its implications for sovereignty and transparency. The deal comes along with another preliminary agreement with Kenya on rare earths, particularly niobium, reflecting broader US efforts to deepen strategic partnerships in East Africa through health and economic cooperation amid geopolitical competition with China.

### SOMALIA

## Israel-Somaliland Relations and Regional Repercussions

The meeting between Somaliland President Abdirahman Mohamed Abdullahi and Israeli PM Benjamin Netanyahu underscored the strengthening ties between the two sides following Israel's recognition of Somaliland in 2025. Discussions focused on economic and security cooperation, while Somaliland denied reports of talks on hosting an Israeli military base. The growing relationship has been strongly criticized by Somalia, which considers Somaliland part of its territory. Beyond the bilateral dimension, closer Israeli engagement in the Horn of Africa could alter regional alignments around the Red Sea and Gulf of Aden, adding a new layer of complexity among regional and external powers.

### CENTRAL-SOUTHERN AFRICA & THE GREAT LAKES



#### MOZAMBIQUE

## Mozambique tightens control on mining projects and export.

Mozambique enacted a law to acquire a 15% stake in domestic mining operations and bans companies from exporting raw, unrefined resources, unless directly authorised. Mozambique ranks as the world's third largest graphite producer — a key material in battery manufacturing — and holds substantial reserves of technologically-critical minerals, like copper, titanium and tantalum, which are critical for electronics producers and the global energy transition. Mozambique joins 13 other African countries which have enacted export curbs on raw materials since 2023. This growing continental movement is impacting global mineral supplies, creating opportunities for Africa (and Europe) to reshape mineral value chains.

### SOUTH AFRICA

## Anti-migrant protests escalate in South Africa

A wave of violent protests targeting African migrants are sweeping South Africa, killing seven and displacing thousands. Fueled by a rooted xenophobic sentiment and high unemployment rates, anti-migrant attacks have been recurrent in Africa's richest economy, which hosts about 3 million immigrants, mainly from other southern African nations. After multiple failures to rein in violence, police forces are tightening controls ahead of 30 June, the deadline set by the March and March xenophobic movement for all migrants to leave, while several African governments —including Ghana, Malawi, Mozambique, Nigeria, and Zimbabwe — have coordinated the evacuation of thousands of nationals. Anti-migrant violence continues to heighten economic risks and undermine South Africa's leadership in African diplomacy.

### RWANDA

## The US increases pressure on Rwanda over Eastern DRC conflict

The US increases pressure on Rwanda over Eastern DRC conflict. The US Treasury has imposed a new round of sanctions on Kigali, this time targeting four minerals trading companies based in Rwanda, including a major gold refinery. These accomplices are accused of fuelling the war in Eastern DRC by smuggling minerals from Rwanda-backed M23/AFC's territories. After the designation of part of the M23 leadership and the Rwandan army for sanctions in the past months, the move confirms how Washington is increasing pressure on Kigali to comply with the peace agreement signed in December. It also signals that the US-DRC security-mining partnership is bearing fruits for Kinshasa.



# Brussels rings the alarm against Chinese-Moroccan EV

BY: FRANCESCO MERIANO

The European Union is increasingly worried by the acceleration of Chinese investments in Morocco. The EU Commissioner for trade and economic security, Maroš Šefčovič, voiced fears that Chinese investments in Morocco may work as a backdoor for Chinese car-makers to circumvent European anti-dumping tariffs and announced investigations on Chinese-Moroccan EV partnerships, a primary focus of Rabat-Beijing cooperation. Morocco, which enjoys virtually zero tariffs thanks to a free trade agreement with the Union, has become an ideal location for assembling factories, where minimally processed components are turned into cars ready for export to the EU market). In the last few years, China invested up to 10 billion dollars in the Moroccan electric vehicle sector, including batteries and components.

Morocco, which already hosts factories run by Stellantis and Renault, is Africa's chief carmaker, with South Africa as its only competitor. Being virtually devoid of fossil resources, it has already developed a robust clean energy pipeline, aiming to cover 52% of its energy mix through renewables by 2030. Morocco can also count on a skilled and still relatively cheap workforce that other African countries still struggle to grow. These are optimal conditions for Chinese EV champions as they help them comply with EU carbon regulations, such as the Carbon-Border Adjustment Mechanism (CBAM), which imposes tariffs on extra-EU imports based on the product's carbon footprint. Last year, Hailang, Shinzoom and BTR New Materials Group announced plans to build three components' factories in Tangiers, while CNGR Advanced Materials is building a fourth at Jorf Lasfar, south of Casablanca. Gotion High Power is also building an EV gigafactory in Kenitra, where Stellantis operates its key Moroccan hub. In 2023, Morocco officially became the largest automotive exporter to the EU. These investments are set to expand this trend further.

A Moroccan backdoor to Europe would further undermine the trade barriers devised by Brussels to stem Chinese overproduction. Chinese EV imports to Europe have grown by 26% between 2024 and 2025, widening the trade deficit in Beijing's favour. Last March, the EU Industrial Acceleration Act introduced further limits for European procurement and strengthened origins and assembly requirements for imported products. However, the EV battle is exposing fault lines across Europe: France spearheads the drive for economic protectionism, while Germany – heart of the European automotive industry – remains largely dependent on imported Chinese components and advocates for a softer approach. Hence, fears that the China-Morocco industrial partnership accelerates the demise of the car industry in Europe grow.

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## Senegal: Crisis, Institutional restructuring and the beginning of a long electoral campaign

BY: LUCIANO POLLICHIENI

In a region characterised by unpredictability and abrupt shifts, the Senegalese institutional crisis was long-awaited. It was just a matter of time before the differences between President Diomaye Faye and his prime minister (and mentor) Ousmane Sonko exploded. Since the legislature's start, the internal crisis within Dakar's ruling PASTEF party had highlighted the difficult political coexistence between Diomaye's and Sonko's visions. On one side, Faye seeks to maintain—albeit recalibrated—pragmatic relations with traditional partners, including France and the West; on the other, Sonko advocates for a decisive pivot toward new allies such as the BRICS, China, and Russia. The key driver of this political fallout is the country's spiralling debt crisis, which is pressuring on the government to cut on spending.

It's one of the most recurring dilemmas in African politics: when anti-system parties gain power, they often struggle to deliver what they promised and, above all, to remain united while in power, especially when confronted with financial hurdles. In the case of Senegal, this incompatibility started to affect the government's daily work, as clearly surfaced over the International Monetary Fund (IMF) dossier. The president favoured continuing negotiations to secure a credit line supporting Dakar through its debt crisis, while the prime minister was determined to break with the Fund and seek alternative financiers. Following months of contradictory announcements, internal divisions, and political stalemates, the definitive rupture occurred: the president formally revoked Sonko's mandate. However, Sonko's dismissal from the executive branch has merely shifted the political battlefield. In a rapid institutional counter-manoeuvre, Sonko was subsequently elected President of the Parliament (National Assembly) and formally reconfirmed as the leader of the PASTEF party. This dual victory consolidates his grip on the legislative branch and his grassroots political base, transforming the national political landscape into an even more difficult 'cohabitation' between the Presidency and the Parliament.

What to expect now for the future of the country that was the fastest-growing in Western Africa until three years ago? Faye is now effectively isolated from the parliamentary majority. To bypass potential legislative obstructionism led by Sonko, the president will likely be forced to govern via executive decrees. This precarious dynamic could last until Faye has the constitutional window to dissolve the parliament and call for new elections. From his new position as President of the Parliament and reconfirmed leader of PASTEF, Sonko is actively organizing his presidential campaign. Having secured his eligibility to run via a recently passed parliamentary law, he is framing his platform around anti-establishment, anti-IMF rhetoric, galvanizing the youth and students.

The timing of this crisis is highly detrimental. The immediate effect is a surge in financial uncertainty. International investors and institutions question the state's capacity to implement the structural reforms required by the IMF to underwrite the public debt financing program. The political climate remains volatile. Following Sonko's initial dismissal from the government, numerous PASTEF supporters—including university students already mobilized against the executive's recent cuts to scholarships—took to the streets, signalling that the electoral campaign will be contested both in the halls of power and in the streets. Political and financial instability are likely to keep investors away from the country, hindering growth and job creation perspectives. Youth protests over harsh economic conditions could soon come back to the fore.

As investors and observers hold their breath, West Africa's most resilient democracy is bracing for a protracted and highly tense electoral season and economic cycle.

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## PHOTO GALLERY



Closing ceremony of the cybersecurity training for 11 African countries in Rome led by Med-Or Italian Foundation, with experts from Leonardo's Cyber Academy.



Executive Director, Umberto Tavalato, visiting the headquarters of Djibouti Telecom to discuss submarine cable security with a Med-Or Africa team.



Med-Or Africa Executive Director, Umberto Tavalato, with Dr Sixtus Chileshe Mulenga, CEO of Musamu Resources, a leading Zambian mining company, and representatives from Zambian and EU authorities at a business forum organised by the Italian government and Africa Finance Corporation (AFC) in Rome.



A Med-Or Africa team conducted a visit to Kilifi, Kenya, to inspect rescue boats and safety at sea procedures in preparation for a blue economy project.



Executive Director, Umberto Tavalato, leads a Med-Or Africa team during a visit to the datacenter at a submarine cable landing station in Djibouti.



Meeting at Cassa Depositi e Prestiti with Zambian representative of mining sectors together with Piano Mattei for Africa team, European Commission DG INTPA, and Med-Or Africa.



Med-Or Africa's adviser Corrado Čok and team visiting the 11th Our Ocean Conference in Mombasa, the first of such summits held in Africa.

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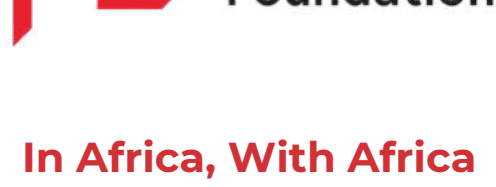
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