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EDITOR'S NOTE

> *While geopolitics is dividing the broader Red Sea region, geoeconomics is being used to manage the consequences. Strategic infrastructure is a critical part of it.*

Last month we examined what a possible closure of the Strait of Hormuz would mean for Africa. This month the ceasefire has collapsed and the confrontation has moved west to the Bab el-Mandeb. The two chokepoints now point to the same reality: the Gulf and the Horn of Africa form a single Red Sea strategic space. The crisis could have pushed the Arab Gulf states to overcome past divisions and forge a more unified response. Instead, despite shared concerns over Iran, the Gulf remains politically divided, and those competing alignments are shaping dynamics across a good part of Africa.

Two broad alignments are emerging. On one side, an "Islamic" bloc centred on Saudi Arabia, Egypt, Turkey and Pakistan, broadly committed to preserving the regional status quo. In Africa this has meant support for the Sudanese Armed Forces, for Somalia's and Eritrea's territorial integrity, and opposition to Ethiopia's pursuit of sovereign Red Sea access. On the other, a more revisionist alignment centred on the UAE, Israel and India. In the Horn, some of its members have been associated with support for Ethiopia's regional ambitions, the Rapid Support Forces in Sudan, and Somaliland's quest for international recognition.

Neither vision offers a complete answer. Defending the status quo may contain fragmentation, but it rarely produces the political or economic transformation the region requires. Revisionism may create new opportunities, but in a deeply fragmented region it also risks accelerating instability. The challenge for African leaders is therefore not to choose between competing external alignments, but to preserve strategic autonomy through pragmatic and flexible partnerships.

Kenya offers a useful contrast. While strengthening its partnership with the UAE, Nairobi has deliberately avoided tying itself to a single geopolitical alignment, maintaining active engagement with Pakistan and Saudi Arabia. Several governments in the Horn are doing the opposite, deepening their attachment to competing external blocs and narrowing rather than expanding their options.

The Horn's strategic balance has long rested on relations between Khartoum and Addis Ababa. When the two cooperated, the region was generally more stable. When relations deteriorated, neighbouring states were drawn into cycles of proxy competition and confrontation. Today the two capitals are more divided than at any point in decades, increasingly aligned with opposing Middle Eastern blocs. Sudan remains engulfed in civil war, while Ethiopia faces renewed tensions in Tigray and strained relations with several neighbours.

Despite rising tensions between Addis Ababa and the Tigray People's Liberation Front (TPLF), what is unfolding is less a march towards renewed war than a competition for leverage, with actors across the Horn flexing their muscles by deepening external alliances rather than rebuilding regional trust. The more likely outcome is that the parties eventually reach a new political arrangement, which makes it all the more important to preserve channels of dialogue and cooperation in the meantime.

These divisions add another layer of complexity to an already fragmented Horn of Africa. They also carry a lesson. Gulf governments are investing today in energy corridors, logistics networks and strategic infrastructure without waiting for political disputes to be resolved. While geopolitics is dividing the broader Red Sea region, geoeconomics is being used to manage the consequences. For African leaders, this may be the single most important lesson of the Hormuz crisis.

Saudi Arabia is expanding the infrastructure required to export larger volumes of hydrocarbons through the Red Sea rather than Hormuz. The UAE is placing greater strategic emphasis on the port of Fujairah to bypass the Strait, while others are looking towards overland corridors to the Mediterranean. A new regional geography of energy is emerging, not because the conflict has ended, but because governments increasingly assume it may endure.

The Horn of Africa faces a remarkably similar challenge. If the Gulf experience demonstrates anything, it is that strategic infrastructure cannot remain hostage to political uncertainty. I have become increasingly convinced that an excessive focus on conflict resolution alone carries risks of its own. The region can move from one peace agreement to the next conflict without ever changing the incentives that make conflict possible. Peace agreements remain indispensable. But they are rarely sufficient when they are not reinforced by shared economic interests and interconnected infrastructure. The world around the Horn, meanwhile, has moved on. Old conflicts now require modern solutions.

Strategic infrastructure is one of them. It should not be regarded as the reward that follows peace, but as one of the instruments through which peace can be built. This is not to underestimate the constraints imposed by conflict: large infrastructure projects cannot be implemented in active war zones. Yet planning, feasibility studies and regional coordination linking the Horn, East Africa and the Gulf need not wait for perfect political conditions. Strategic thinking should precede political settlement, not follow it.

Saudi Arabia recognised this years ago when it proposed the Council of Arab and African States Bordering the Red Sea and Gulf of Aden. Had the initiative developed into a more effective regional institution, it might have helped contain some of today's fragmentation while providing a platform to coordinate strategic infrastructure and maritime security.

For IGAD, this represents both a challenge and an opportunity. Continued fragmentation risks rendering the organisation increasingly irrelevant. Reinvention, centred on regional connectivity and closer coordination with the more cohesive East African Community, could instead restore its strategic relevance and attract renewed political and financial support.

Whether for IGAD or the Red Sea Council, there is little reason to wait for the region's crises to be resolved before creating, reforming or merging the institutions capable of managing them.
Aliko Dangote's announcement this month of plans to invest in East Africa's first major refinery at Kenya's Lamu Port illustrates exactly this logic. Whether the project ultimately succeeds remains to be seen, but it represents the kind of strategic ambition the region requires: investing at scale, thinking beyond national borders, and shaping the economic geography of tomorrow rather than waiting for it to emerge.

The objective is not to compete with Gulf refining capacity but to capture greater value within Africa's own energy economy. Oil and gas from Uganda, Tanzania, Mozambique and potentially Kenya should become the foundation of African industrial capacity. Domestic refining would strengthen energy security, manufacturing and regional supply chains.

The search for strategic autonomy extends beyond hydrocarbons to electricity. The Grand Ethiopian Renaissance Dam has transformed East Africa's energy landscape and established Ethiopia as an electricity exporter. Yet even with national installed capacity approaching 10 GW, this represents only a first step. Across the Red Sea, Saudi Arabia is building one of the world's largest integrated energy systems, combining hydrocarbons, electricity, renewable power and green hydrogen. Africa's challenge is therefore not simply to produce more energy, but to connect its emerging energy systems with larger markets.

What lies ahead is the possible emergence of a different model of African development. A continent of 54 states does not need 54 refineries, 54 AI data centres, 54 critical-mineral processing plants or 54 cyber-security operations centres. The new economic geography favours regional sectoral hubs rather than national duplication, allowing countries to share costs, capabilities and markets while building on their comparative advantages.

The promise of the African Continental Free Trade Area lies in exactly this: turning Africa's regional economic communities into an integrated continental market, where prosperity is generated through regional specialisation rather than the replication of strategic industries in every national economy.

Many of these ideas are already informing Med-Or Foundation's work. This month, we hosted H.E. Ilyas Moussa Dawaleh, Djibouti's Minister of Economy and Finance in charge of Industry, for a strategic dialogue on the Bab el-Mandeb with Italian institutions and industry; welcomed Admiral Giuseppe Cavo Dragone, Chair of the NATO Military Committee, to discuss the Alliance's strategic outlook; concluded a two-year diplomatic capacity-building programme for Somali diplomats in support of Somalia's UN Security Council membership; and participated in the launch of BFuture Farm in the Republic of Congo, a flagship Piano Mattei initiative by a member of Med-Or, demonstrating how productive investment, infrastructure and local capacity-building can strengthen regional value chains.

Umberto Tavolato
Executive Director,
Med-Or Italian Foundation for Africa

UPDATES

NORTH AFRICA

MOROCCO

Trump relaxes duties on Moroccan fertilizers

Disruption in fertilizer supplies through the strait of Hormuz is putting pressure on US agricultural production, prompting President Trump to relax duties and anti-dumping measures on Moroccan imports for eight months. This signals a truce in the "fertilizer war" waged between US company Mosaic and Moroccan State champion OCP. Facing similar pressure, OCP itself is seeking to reroute sulphur imports for its own phosphate fertilizers by way of Kazakhstan and Georgia. Having leveraged its status as a fertilizer hub to expand its influence across Africa, Morocco may now seek to exploit the Hormuz crisis to foster a lasting reconciliation with Mosaic, thereby smoothing a source of friction with its US ally.

EGYPT

Egypt strengthens defence ties with Turkey

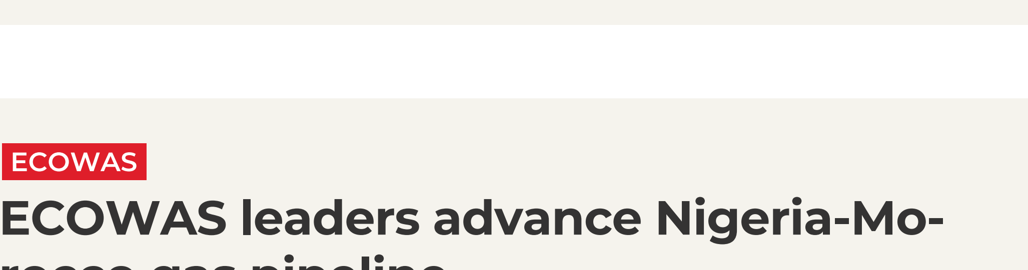
Egypt and Turkey are pursuing enhanced defence ties, signing two letters of intent concerning military and defence industry cooperation. Though they remain at odds over maritime demarcation in the Eastern Mediterranean and their respective approach to political Islam, both countries have sought closer cooperation in the last few years, as highlighted by the Al-Sisi-Erdoğan meeting last February. The two have also grown increasingly aligned on key dossiers in Gaza, Sudan and the Horn of Africa. Egypt and Turkey consequently grow closer to Saudi Arabia and Pakistan, bolstering a nascent bloc to counter Emirati regional influence.

EGYPT

Cairo tightens grip on the economy amid IMF negotiations

Burkina Faso's military government has taken two further steps away from international engagement, formally severing diplomatic ties with France and withdrawing from the jurisdiction of the International Court of Justice, alongside Mali, Niger, and most recently Chad - who has also announced its withdrawal. The moves reinforce Ouagadougou's broader shift away from traditional Western partnerships in favour of a deeper alignment with China, Russia and other emerging powers, such as Turkiye.

WEST AFRICA AND THE SAHEL



BENIN

Benin and Burkina Faso launch joint border offensive

Benin and Burkina Faso have launched coordinated operations along the Koualou border, signaling a pragmatic security rapprochement despite recent regional tensions. The initiative reflects a growing reliance on bilateral military cooperation to contain the southward spread of jihadist violence, highlighting the limits of ECOWAS as a regional security framework.

ECOWAS

ECOWAS leaders advance Nigeria-Morocco gas pipeline

On 19 July, in Freetown, the 69th ECOWAS Summit marked a transition for the regional bloc. The appointment of former Defence Minister General Birame Diop, a military figure with extensive UN peacekeeping experience, to lead the Commission underscores ECOWAS's effort to adapt its leadership to an increasingly challenging regional security environment. At the meeting, leaders also approved the construction of a gas pipeline linking Nigeria and Morocco, designed to transport up to 30 billion cubic metres of natural gas a year from Nigeria through West Africa to Morocco.

BURKINA FASO

Burkina Faso breaking ties with the international community

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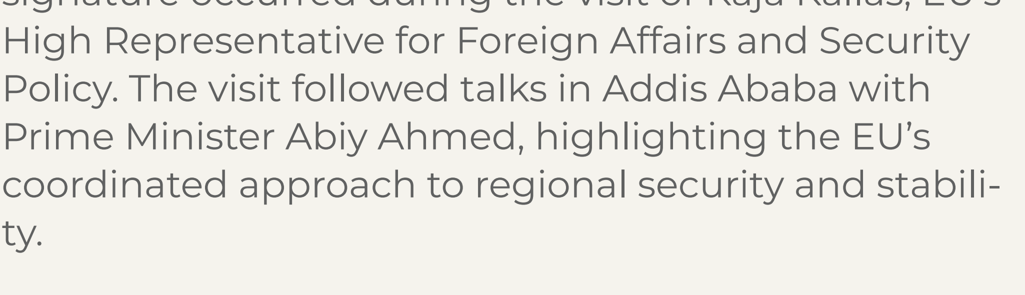
ALGERIA

Algeria and Mali restore ties amid shifting regional dynamics

After more than a year of diplomatic tensions, Algeria and Mali have restored bilateral relations, reopening their airspace and reinstating ambassadors. The rapprochement, facilitated by Russian mediation, highlights Moscow's continued diplomatic influence in the central Sahel despite growing competition with Western powers. As relations thaw, Bamako might seek Algeria's support in containing Tuareg rebel factions in the country's north, which are siding with the Al Qaeda main Sahelian affiliate (JNIM) after the Malian government restarted the war against the Tuareg in 2022-2023.

EAST AFRICA AND THE HORN



DJIBOUTI

EU and Djibouti deepen Maritime Security Cooperation in the Red Sea

Forces Agreement (SOFA) was signed to regulate the presence and activities of the EU's naval operation EUNAVFOR ASPIDES in Djibouti, reinforcing maritime security and freedom of navigation in the Red Sea. As part of the EU's engagement in the Horn of Africa, the signature occurred during the visit of Kaja Kallas, EU's High Representative for Foreign Affairs and Security Policy. The visit followed talks in Addis Ababa with Prime Minister Abiy Ahmed, highlighting the EU's coordinated approach to regional security and stability.

SOMALIA

Saudi Arabia expands security engagement in Somalia

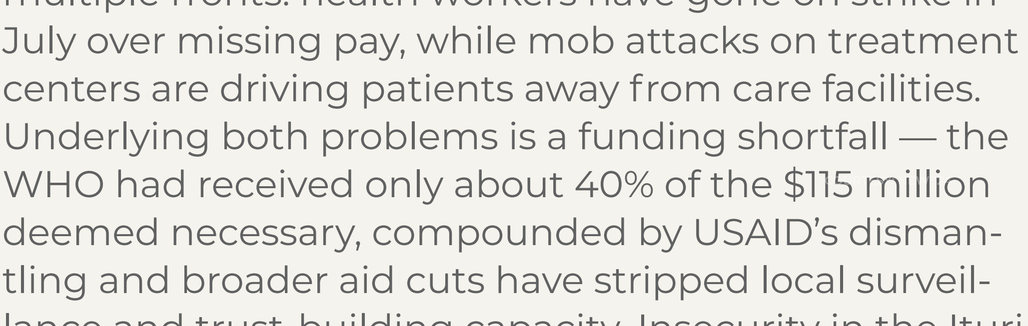
As part of its defence cooperation agreement with Somalia, Saudi Arabia is training around 5000 Somali troops under a Saudi-funded programme. The move underscores Saudi Arabia's growing security role in Somalia, joining other regional powers seeking greater influence in the country. Other than the long-term security roles of the UAE and Qatar, Turkey has extended the mandate for its troops to operate in Somalia and authorised the use of Somalia's spaceport for hypersonic missile tests.

SUDAN

RSF accepts truce in Sudan but rejects withdrawal

While Washington calls for a humanitarian truce, a comprehensive ceasefire, and the launch of reconstruction efforts, the RSF refuses to withdraw from controlled territories, particularly in North Darfur and North Kordofan. In spite of RSF's willingness to engage in a political settlement, security arrangements, institutional reforms, and a transitional government, its refusal to relinquish military gains stalled the US-backed peace initiative.

CENTRAL-SOUTHERN AFRICA & THE GREAT LAKES



DEMOCRATIC REPUBLIC OF CONGO

Ebola passes 1,000 confirmed deaths amid growing challenges in response

As of July 23, confirmed deaths from the Ebola outbreak have surpassed 1,000, with roughly 2,500 cases across five provinces of north-eastern DRC plus spillover into Uganda. While new and existing drugs are being tested, response efforts are undermined on multiple fronts: health workers have gone on strike in July over missing pay, while mob attacks on treatment centers are driving patients away from care facilities. Underlying both problems is a funding shortfall — the WHO had received only about 40% of the $115 million deemed necessary, compounded by USAID's dismantling and broader aid cuts have stripped local surveillance and trust-building capacity. Insecurity in the Ituri province, driven by the resurgence of the Al- Qaeda affiliated Allied Democratic Forces (AFD), has further hindered efforts to contain the spread of the virus.

ZIMBABWE

Zimbabwe strengthens its position in the critical lithium market

Zimbabwe secured $300 million from a group of mainly Chinese companies to develop its lithium assets, reinforcing Beijing's dominance in the sector. Zimbabwe is Africa's top lithium producer accounting for 10% of total global supplies in 2025, which is essential for manufacturing the batteries that power electric vehicles and renewable energy storage. Harare is holding firm on resource nationalism: Mines Minister Polite Kambamura rejected industry calls to delay a raw lithium export ban set for January 2027, tightening Harare's control of the sector. This mirrors President Mnangagwa's political consolidation, having signed into law legislation extending his term in office by two years to 2030 — together reflecting a state tightening its grip on both resources and governance.

BOTSWANA

De Beers' strategic shift in Botswana and South Africa

De Beers, the global leader in the diamond industry, is shutting down its largest South African mine, Venetia, amid mounting structural pressures. The diamond industry is facing an acute crisis, fueled by collapsing Chinese luxury demand and the proliferation of lab-grown alternatives. De Beers' initiatives to cope with the diamond market crisis are also affecting southern African countries' historic revision of its relationship with key players in the industry. Botswana's economy has contracted by 5.3% according to estimates, triggering a fiscal and social crisis highlighting economic dependence on the diamond sector. The local Debswana consortium announced a production cut of 27% in a move that might increase diamond market value but will surely prolong the country's economic crisis in the short term.

The US doubles down on East-West deal despite hurdles

Washington aims to reunify the country through a power-sharing agreement between the western GNU and its eastern counterpart, GNS

BY: FRANCESCO MERIANO

New details have emerged regarding US negotiations in Libya. According to a draft plan seen by Reuters, Washington aims to reunify the country through a power-sharing agreement between the western Government of National Unity (GNU) and its eastern counterpart, the Government of National Stability (GNS). The plan would grant premiership to GNU prime minister Abdul Hamid Dabaiba, while Saddam Haftar – heir to the Libyan National Army which constitutes the chief power behind the GNS – would become leader of the Presidential Council, the tripartite organ acting in lieu of a head of State.

Fearing the power shift the agreement would usher in, the Presidential Council of Libya and the country's twin, but longtime divided, legislative bodies from Libya's east and west – the High Council of State in Tripoli and the House of Representatives in Tobruk – have answered by announcing their agreement on a roadmap to hold national elections by February 2027. The statement marks a significant juncture in the country, which still hosts two rival administrations after the failure of similar reunification attempts in 2021. Libya's two Parliaments have since sought to maintain the status quo, with subsequent negotiations yielding few results. However, fear of being side-lined by a Dabaiba-Haftar deal has likely prompted a more vocal approach.

The deal is also triggering local opposition. On July 7 th , Massad Boulos – advisor to president Trump and driving force of the US mediation in Libya – flew to the western Libyan port of Misrata, where he met representatives of the city's Council of Elders. Both the Council of Elders and the Military Council, which oversees the city's coalition of militias, condemned the deal and any attempt to legitimize Haftar rule over the west. Misrata's refusal spells trouble for Dabaiba, who relies on its powerful militias to bolster his ranks in Tripoli. Ties with the city had already suffered a blow with the death of Chief of Staff Mohamed al-Haddad, who acted as a key liaison between Tripoli and Misrata, in a 2025 air crash.

But tensions are also heating up in the Fezzan, Libya's vast desert region in the south. Attempts by Saddam Haftar to strengthen the LNA hold on the Fezzan has triggered resistance by cross- border armed groups, who use the region as a safe haven and seek to retain use of key smuggling routes between the Sahel and North Africa. Against this backdrop, the brief arrest of a GNU counter terrorism officer in northern Niger suggests Tripoli may be contacting rebel groups in the Sahel to hinder the Haftars' southward drive. Such dynamics point to an intensifying GNU-LNA struggle over the southern routes and access to the Sahel, which may also supply leverage as both factions vie for Washington's favours.

Sudan also remains a pressing issue for the Haftars. Despite being pressured by its Saudi and Egyptian backers to drop its support for the Rapid Support Forces in their war against the Khartoum government, the LNA continues to facilitate flows of arms, gold and migrants between Kufra and rebel-held north Darfur, with the United Arab Emirates allegedly serving as the main liaison between the two, according to the media consensus. As the Sudan conflict spreads to neighbouring countries, the Haftars thus pursue a delicate balancing act between Saudi and UAE desiderata.

Dangote's Pivot to East: The new Lamu refinery project

...the Lamu project will inevitably modify East Africa's economic and political architecture by centralizing processing in Kenya

BY: LUCIANO POLLICHIENI

Aliko Dangote's confirmation that his conglomerate will construct a 700,000-barrel-per-day oil refinery in Lamu, Kenya. The announcement ends months of regional speculation and initiates a highly ambitious phase of East African energy infrastructure. Slated for completion in thirty months, the facility mirrors Dangote's sprawling Nigerian complex and aims to fill a massive downstream vacuum in eastern and southern Africa. The decision delivers a major infrastructural victory to Kenyan President William Ruto, who has touted a pan-regional supply chain drawing from the Democratic Republic of Congo, South Sudan, and Uganda.

The project nonetheless faces structural conundrums regarding feedstock sourcing and financing. Despite Dangote's proven capacity to execute mammoth industrial projects, the logistical friction of securing crude in a region still affected by underdeveloped reserves and rival corporate fiefdoms, making the Lamu refinery a high-stake bet on future regional cohesion. South Sudan's 174,000-bpd output remains tethered to pipeline infrastructure traversing war-torn Sudan, while Uganda's impending crude production is locked into the East African Crude Oil Pipeline (EACOP) directed toward Tanzania and heavily controlled by TotalEnergies, a competitor unlikely to divert feedstock to a rival's facility. Dangote's recent diplomatic overtures to Tanzanian President Samia Suluhu Hassan - offering Dodoma a stake in the Lamu venture - highlight a strategic attempt to pre-empt regional fracturing.

The Lamu project will inevitably modify East Africa's economic and political architecture by centralizing processing in Kenya, leading to a strategic recalibration among neighbouring states. For Nairobi, anchoring the refinery at the troubled LAPSSET corridor terminus offers a chance to revive a stalled mega-infrastructure project and reinforce its regional influence. However, the misalignment between the refinery's demands and the fragmented, localized realities of East African crude extraction will require diplomatic and infrastructural synchronization across the Great Lakes and the Horn.

Beyond the immediate regional theatre, the Lamu refinery injects a potent new variable into the broader geoeconomic competition over Indian Ocean maritime routes and African resource sovereignty. By potentially establishing East Africa as a self-sufficient hub for refined petroleum products, the Dangote project aims to provide some of Africa's fastest-growing manufacturing economies with refined oil products to boost intra-African trade and industrialisation broadly. The sheer scale of capital and ancillary infrastructure required to make Lamu viable - spanning pipelines, deep-water port expansions, and security systems - will inevitably invite intense engagement from external actors, such as Gulf sovereign wealth funds and potentially China. Concerning European countries, the new refinery intends to capitalise on the fallout from the war in Iran, especially in the context of the conflict's restart, which has exposed Europe's lack of refining capacity and is now pushing European states to reconsider African producers as potential suppliers of refined products.

If successful, Dangote's expansion signals a maturation of intra-African capital, making itself autonomous from traditional players.

After Agadez: The US recalibrates in the Lake Chad Basin

The United States is putting together a network of smaller, partner-hosted deployments across the Lake Chad Basin

BY: MATILDE VECCHIONI

Nearly two years ago, Niger's military junta expelled U.S. forces and closed Air Base 201 in Agadez. Today, Washington is quietly rebuilding its military footprint in West Africa – and doing it differently. While the overall mission is still framed around counter-terrorism, the model has changed. Rather than rebuilding another Agadez, the United States is putting together a network of smaller, partner-hosted deployments across the Lake Chad Basin while enhancing diplomatic engagement with regional governments. The shift reflects two key realities: a security environment across the Sahel that keeps worsening, and a geopolitical competition that sees Russia and China's footprints expanding.

The new approach is already visible in Cameroon and Nigeria. In Cameroon, U.S. personnel are preparing to return to Salak, in the Far North Region, to provide intelligence, surveillance, and reconnaissance (ISR) support to Cameroonian forces fighting Islamic State West Africa Province and Boko Haram. Nigeria has followed a similar model: around 200 U.S. personnel were deployed earlier this year to support a time-limited counter terrorism mission in the Lake Chad Basin. Once the operation concluded in July, most returned home, but intelligence sharing and broader security cooperation with Abuja continued. Taken together, these moves reveal a new way of operating. Instead of concentrating surveillance assets at a single – and potentially vulnerable – location, Washington is attempting to build a distributed network of partner-hosted sites that provides strategic coverage of the Lake Chad Basin, while placing regional militaries at the forefront of potential military operations.

The military shift has been accompanied by a diplomatic approach. In July, during his first visit to Africa as Assistant Secretary of State for African Affairs, Frank Garcia traveled to Nigeria, Côte d'Ivoire, and Mali to strengthen security and economic ties. Each stop had its own logic. Nigeria remains Washington's main security and economic partner in the region. Côte d'Ivoire is emerging as a stable coastal ally helping contain instability spreading south from the Sahel. Mali, despite its relationship with Russia's Africa Corps, remains a key arena in the contest for influence in the Sahel. Taken together, these stops form a strategic itinerary: one that reinforces ties with trusted partners while testing the scope for engagement with governments that have moved closer to other powers.

Similarly, recent meetings in Washington with ambassadors from the Alliance of Sahel States suggest an intention to keep diplomatic channels open with the region's military-led governments, despite strained relations. Garcia's meeting with Chad's new Ambassador to Washington in early July goes in a similar direction. While Chad brings complications of its own – particularly considering its connection to Sudan's conflict, related conflict economies and internal tensions – the meeting still signals a diplomatic rapprochement between the two countries.

In sum, less than two months into Garcia's appointment, the US appears to be pursuing a strategic recalibration in West Africa, and in the Lake Chad Basin more specifically. In a region increasingly shaped by fluid political alignments and increasing competition among external powers, long-term influence will depend less on the size of the US military footprint, and more on Washington's ability to forge credible, mutually beneficial partnerships. Garcia's early initiatives suggest that a shift away from the Agadez model is already underway - whether this will ultimately preserve or strengthen US influence remains an open question.

Who will fight Al-Shabaab in the future?

Al-Shabaab will have more operational room to pressure the Somali National Armed Forces (SNAF)

BY: CORRADO ČOK

On July 1 st , the US announced a halt to all funding to the UN agency (UNSOS) in charge for logistics of the African Union mission fighting Al-Shabaab in Somalia (AUSSOM) from the end of 2026. As UNSOS critically handles transportation of troops and supplies, the decision fixes another major nail in the coffin of a stumbling peace enforcement operation.

Launched in 2025 with a five-year mandate, it is the third consecutive mission in the country – the first deployed in 2007 – motivated by the unabated need to contain Al-Shabaab in central-southern Somalia through an international military presence on the ground. AUSSOM's journey has been fraught since inception. The 11,000-troop strong mission has only secured about 25% of its 2025 budget, de-facto running on credit. The main cause was again a US veto imposed by the Trump administration on funding the mission through the UN standard funding system of assessed contributions. Decreasing AUSSOM's annual budget from $190 to $166.5 million has not sufficed to meet its funding requirements. Now, without UNSOS' half-a-billion annual logistics budget, the African Union's mission will be unable to operate.

What are the consequences for Somalia and its partners? The cut on logistics will force AUSSOM to withdraw or, if an alternative arrangement is found, confine its presence to a few major urban centres. Al-Shabaab will have more operational room to pressure the Somali National Armed Forces (SNAF), which have historically struggled to hold territory against the Al-Qaeda affiliate, especially in rural areas.

This will likely increase Somalia's reliance on its external security partners to underpin its efforts. Türkiye is the linchpin of such military partnerships. Over the years, Ankara has trained the widely-deployed Gorgor special forces and provided various critical equipment and assets, such as Bayraktar drones, even deploying F-16 fighter jets earlier this year. On the other hand, the federal government has lost United Arab Emirates' support – once the main sponsor of SNAF's salaries – after the breakdown of relations occurred in January over Abu Dhabi's sustained relations with Somaliland and Somali member states at odd with Mogadishu, i.e. Puntland and Jubaland. Alternative support from Saudi Arabia and Qatar has lagged behind initial expectations and the Iran war is likely constraining them further. As a result, Somalia is set to become increasingly reliant on Türkiye for its defence.

Even if Somalia is likely to withstand an AUSSOM withdrawal or significant downscaling, pressure on partners is going to mount, and not just on Türkiye. Ethiopia and Kenya face the most direct threat from Al-Shabaab on their borders and rely on AUSSOM to deploy most of their troops to Somalia. Due to their financial constraints, they might be forced to seek further external support to underpin their security efforts, likely turning to the Gulf in this pursuit. The Europeans are also major losers in this situation. The US decision comes only two months after the EU announced a €75-million package to mitigate AUSSOM's financial crisis. Yet, European funds risk going wasted if the African Union's mission can no longer operate.

The AUSSOM crisis comes at a very delicate moment for Somalia. A constitutional standoff between the federal government and the opposition is putting the country's state-building process under severe strain. External donors – not just the US – are growing increasingly frustrated with it and are already reviewing funding allocations. Ultimately, these developments urge the EU and the other external partners to rethink profoundly their security cooperation with Somalia if the fight against Al-Shabaab is to proceed.

Russia's expanding presence in the western Indian Ocean

Moscow has increasingly sought to complement its security presence by expanding its engagement to sectors such as infrastructure, agriculture, energy, and mining

BY: MATTEO MOSTARDA & JILLIO RAMADHAN

Russian Foreign Minister Sergey Lavrov embarked on an official visit in Africa. From Addis Ababa, he announced Russia's intention to establish a satellite assembly and testing centre in Ethiopia to enhance bilateral cooperation in the space sector. He also signed a joint declaration with the African Union addressing a broad range of strategic issues concerning Russia–Africa relations, before continuing to Burundi, Mozambique and Niger.

In recent years, Russia's engagement in Africa has centered on security cooperation and military ties. However, more recently, Moscow has increasingly sought to complement its security presence by expanding its engagement to sectors such as infrastructure, agriculture, energy, and mining, relying on the willingness of several East African governments to diversify international partnerships. A flurry of meetings and agreements have occurred in or with the countries of Africa's Indian Ocean rim since at least the beginning of the year. The first Houthi crisis (2023-2025) caused the rerouting of a significant portion of maritime trade away from the Red Sea towards the Cape of Good Hope, enhancing the strategic relevance of the western Indian Ocean. Now, Russia might be looking in this area.

In June 2026, Tanzanian President Samia Suluhu Hassan paid an official visit to Russia, accompanied by a business delegation, with the aim of strengthening political ties and expanding bilateral trade; following the visit, the launch of direct flights was announced. In May, Russia signed a MoU with Rwanda on cooperation in nuclear medicine, building on an earlier agreement concerning the peaceful use of nuclear energy. Ethiopia, which enjoys historic and robust ties with Russia, has sought to expand fertilizer imports from it and is exploring industrial cooperation. The Kremlin has also supported Ethiopia's efforts to develop a navy, reflecting the country's ambition to regain access to the Red Sea. Moscow has nevertheless maintained an ambiguous position vis-à-vis Ethiopia and Eritrea, with the latter remaining a close Russian ally in the Horn of Africa that had been in the radar for the potential development of a naval base in the ports of construction of Massawa or Assab.

A direct presence in the Red Sea remains a strategic objective for Moscow. Following the loss of full operational control over the Tartus naval base, Russia has intensified efforts to achieve a logistical foothold in the Red Sea, reaching a final agreement with the Sudanese Armed Forces for a logistical base in Port Sudan.

Russia is also strengthening its military cooperation with Madagascar and Mozambique as part of its broader effort to expand its strategic presence in the Mozambique Channel and the western Indian Ocean. Relations between Putin and the Malagasy President Randrianirina have been rapidly intensifying, meanwhile, Russian Foreign Minister Lavrov announced that Russia intends to provide support to Mozambique in countering the jihadist threat.

Nevertheless, Russia's regional strategy faces significant constraints. First and foremost, the clear advantage held by other actors - especially China - reduces Russia's room for maneuver, while the war in Ukraine, international sanctions, and Russia's relatively limited financial resources hinder its ability to follow through on the agreements signed and announced projects. Moreover, allegations regarding mercenary activities and disinformation campaigns continue to undermine Moscow's reputation. Further undermining Russia's credibility on the continent, according to multiple investigative reports, the Kremlin is carrying out a recruitment campaign targeting young Africans, luring them with fraudulent employment opportunities before deploying them either to the front lines in Ukraine or to drone manufacturing facilities.

The third Russia–Africa Summit, announced by Lavrov and scheduled for October 2026 in Moscow, will serve as an important test of Russia's ability to consolidate its position in the western Indian Ocean.

Ending Sudan's war requires bridging military and political tracks

It is more than evident now that this war cannot have a military solution.

BY: CHEPKORIR SAMBU

When the current Sudan war broke out in April 2023, many experts counselled swift action to halt it. They emphasised that there could be no military solution to the war and warned that delays or miscalculations could cause a catastrophe, drawing in civilians and igniting broader instability from the Horn to the Sahel. What formally followed was the U.S.-Saudi-led Jeddah Process, which narrowed its approach to the two primary warring parties: the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF). In doing so, it sidelined civilians, who had no role in starting the war and had not aligned with either side. Nevertheless, this process produced the Jeddah Declaration of Commitment to Protect the Civilians of Sudan. The commitments enshrined therein were quickly violated.

Subsequent mediation attempts by IGAD, A.U., U.N., Egypt, and various iterations of Jeddah introduced different definitions of the problem in Sudan. Meanwhile, initial expert predictions materialised: Sudan is the largest humanitarian crisis in the world, with over 11 million people displaced, a high death toll, massacres, destroyed infrastructure, and deepened civilian divisions. Darfur, Blue Nile, and Kordofan, are at the centre of contestation, with critical focus on El-Obeid, where RSF encirclement has drawn urgent humanitarian warnings from the U.N. Concurrently, SAF is redeploying troops to the tri-border region with Egypt and Libya to reinforce its positions in North Darfur, support allies in West Darfur, and sever RSF supply corridors from Libya. For its part, the RSF maintains strategic footholds along parts of Sudan's borders with Chad, Libya, Ethiopia, and South Sudan, reflecting its interest to secure supply lines.

Externally, transnational elements are visible. Across the Horn and Central Africa, neighbours, including Egypt, Eritrea, Ethiopia, Chad, the Central African Republic (CAR), and Libya, have taken opposing sides and are providing external support. Non-state armed groups (NSAGs) operating within neighbouring countries are also fuelling the conflict, which often spills over. Host countries are feeling the weight of accommodating displaced Sudanese refugees. Moreover, NSAGs driven out by the CAR government and the Russian Africa Corps have established rear bases in western Sudan to regroup. Internally, the destruction of state institutions has rendered Sudan susceptible to transnational crime, as evidenced by recent SAF operations against human trafficking in Khartoum.

Outside the continent, Gulf states continue to back and consolidate power for their regional proxies. The UAE is accused of supplying arms and logistical support directly to the RSF and through neighbouring countries, while Egypt reportedly enhances the SAF. Saudi Arabia has initiated diplomatic efforts to position itself as the architect of Sudan's political future, hosting leaders of various civilian factions to build a civilian base for General al-Burhan. Saudi Arabia is also making renewed attempts to revive the Jeddah Process.

Throughout these developments, and in addition to external interference, peace efforts have faced two main challenges: managing civilian political diversity and unifying mediation initiatives. Regarding mediation, the loose connection between the Quad and the Quintet poses a coordination challenge. The Quad (U.S., Saudi Arabia, UAE, and Egypt) is pursuing the military track. A ceasefire proposal presented by Massad Boulos in June in Cairo mirrored earlier ones, calling for a 90-day humanitarian truce, followed by demilitarisation and a 9-month civilian transition. The SAF rejected this proposal, declining to legitimise the RSF as an equal party. General al-Burhan has sought to reopen indirect dialogue with the UAE, but these efforts have yielded no progress, and the U.S. is reportedly growing impatient with SAF.

On the civilian front, fragile progress towards political convergence is emerging. Civilian actors have established a Preparatory Committee for Inter-Sudanese Political Dialogue and agreed on core principles: the unity of Sudan, no military solution, and a civilian-led Sudan. The Quintet, overseeing the political track of mediation, is prioritising support and protection of this emerging civilian convergence. It is more than evident now that this war cannot have a military solution. Ending it and preventing the structural fragmentation of the state will only be possible if the military and political tracks are bridged behind a civilian political process.

NEWS FROM ITALY'S MATTEI PLAN

Malolo marks a new chapter in Italy-Africa agricultural cooperation: *6,000 hectares reborn in year one of the BFuture Farm project*

A new model of agricultural cooperation between between Italy and Africa is beginning to take shape in Malolo, in the Republic of Congo, where BF International – the international arm of BF SpA and a member of the Med-Or Italian Foundation – has officially launched the first BFuture Farm. Unveiled on 16 July 2026 in Jolanda di Savoia (Ferrara), the project marks a significant milestone in a broader strategy that combines agricultural innovation, sustainable investment, and long-term local development.

The project lies at the intersection of Italian foreign policy and private agribusiness investment. It's part of the AREA initiative (Action for the Strengthening of Agri-Food Ecosystems in Africa), co-financed by Italy's Ministry of Foreign Affairs and International Cooperation (MAECI), with CIHEAM Bari as knowledge partner, BF International as the private-sector lead, and backed by export credit agencies SACE and SIMEST. Developed within the framework of the Piano Mattei, Italy's national strategy for economic partnership with Africa, the project is built on a distinctly non-extractive model. The 10,000 hectares allocated to the initiative are held under a multi-year usage concession granted by the Congolese authorities rather than through outright acquisition, ensuring that both land ownership and agricultural output remain with the host country.

In under twelve months, the Malolo site, in the Niari region, has moved from bare land to a functioning agricultural and industrial operation. On the production side, 6,000 hectares have been rehabilitated, with over 1,000 hectares already under cultivation and a soybean harvest recently threshed; the farm runs on a digital agronomic platform combining satellite monitoring, weather stations, and IoT sensors for real-time, climate-resilient decision-making. A new irrigation network now supports modern systems and four community water points, alongside roughly 20 kilometres of new roads and the region's first electrical line.

Around 450 people are currently employed across the project – 100 in agricultural operations, supported by 50 machines, and 350 in construction, working across a 5,300 square meter site. An industrial hub is also under construction, including grain silos, a drying facility, a feed mill, a seed plant, and a powdered-milk production line.

The vision goes beyond yields. Working with CIHEAM Bari, BF Educational, and the IASA – Institute of Advanced Science for Agriculture, the farm offers vocational pathways in agriculture, mechanics, and agro-industrial management, aimed at building local skilled employment over time. Additionally, alongside industrial facilities, the region's first health center and a maternity clinic are in completion, together with a renovated school, 60-bed staff housing, a canteen, and a sports facility.

The Republic of Congo is the first country to host a BFuture Farm, but it won't be the last: similar initiatives are already underway in Algeria, Ghana and Senegal, with more planned for Côte d'Ivoire, Mauritania and beyond. More than the launch of a new agricultural project, the BFuture Farm in Malolo is a signal of where Italy-Africa relations are heading: away from aid or resource extraction, toward shared investment, knowledge transfer, and reciprocal value creation. By weaving together agricultural production, infrastructure, industrial development, and skills training, it shows how the Piano Mattei's ambitions are translating on the ground and offers an early template of a new kind of international cooperation – one built on growth, skills, and community wellbeing.

PHOTO GALLERY

Djibouti's Minister of Economy, Finance & Industry, Ilyas Moussa Dawaleh, meets senior representatives from the Italian government, security agencies and leading industrial firms at a high-level roundtable organised by Med-Or for his visit to Rome.

Djibouti's Minister of Economy, Finance & Industry, Ilyas Moussa Dawaleh, and Med-Or Africa's Executive Director, Umberto Tavolato, sign a Memorandum of Understanding between the two organisations to pursue strategic initiatives.

A group picture from the training for Somali diplomats, organised in Mogadishu by Med-Or with UNITAR and funded by the Italian Ministry of Foreign Affairs and International Cooperation.

Somalia's Minister of Foreign Affairs, Abdisalam Ali, and Med-Or Africa's Executive Director, Umberto Tavolato, at an executive training for Somali diplomats in Mogadishu.

Admiral Giuseppe Cavo Dragone, Chairperson of NATO's Military Committee, delivers a speech at Med-Or Day in Rome.

IGAD Executive Secretary, Dr. Workneh Gebeyehu, with Med-Or Africa's Chepkorir Sambu at an executive IGAD workshop in Kenya.

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