



Med-Or Monthly AFRICA REPORT

MedOr
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*in Africa,
with Africa*

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EDITOR'S NOTE

“The Great Red Sea War has begun. The first development is the renewed fighting between Ethiopia's federal government and Tigrayan forces and their new allies.”

August gave us a break from this report. History, unfortunately, did not take one.

We return after two months to a region that has changed profoundly - and for the worse. Two developments tower above the rest: the return of large-scale war to Ethiopia and the Houthi seizure of Mokha and Perim Island at the mouth of Yemen's Bab el-Mandeb.

Taken separately, either would constitute a major geopolitical event. Taken together, they point to something larger: the conflicts that have consumed the Red Sea region for years are beginning to converge into a single confrontation.

The Great Red Sea War has begun.

The first development is the renewed fighting between Ethiopia's federal government and Tigrayan forces and their new allies. Whatever remained of the political order created by the 2022 Pretoria Agreement has effectively collapsed. And this time the conflict extends far beyond Tigray.

Ethiopia has accused Eritrea, Sudan and Egypt of supporting the rebellion. All three deny the allegations. But irrespective of the extent of their involvement, this war can no longer be understood solely through the politics of Addis Ababa, Mekelle and Asmara.

This is not simply a second Tigray war. It is the long-predicted reckoning - **the “war of wars” in the Horn of Africa**. It connects Ethiopia's internal fractures with the Ethiopia-Eritrea confrontation, Abiy Ahmed's quest for access to the Red Sea, the war in Sudan, the unresolved contests surrounding Somalia and Somaliland, and the growing competition among Middle Eastern powers across the region.

There are fundamental differences from the first Tigray war. The Tigrayans are now militarily weaker, more divided and less well equipped. But they are also far less isolated. They have established a new rebel coalition that brings together armed groups that only four years ago were killing one another.

An anti-Abiy coalition is not necessarily a coalition capable of taking Addis Ababa. For that to happen, the critical variable is Oromia. The Oromo are Ethiopia's largest ethnic group; Abiy Ahmed is himself Oromo, and Addis Ababa is surrounded by Oromia. Although the Oromo Liberation Army has joined the anti-government alliance, it is under pressure from key Oromo elites which remain invested in the existing order. This is the first political battlefield I would watch most closely. Unless the rebellion produces a much broader, yet unlikely, Oromo realignment, Addis Ababa will hardly face an immediate threat. But protecting the capital is not the same as defeating the northern rebellion. The most immediate danger is another enormous war of attrition.

And then there is Eritrea. Once Addis Ababa's ally against the Tigrayans, Asmara has become Tigray's most consequential external ally. The development I would watch most carefully is whether Abiy moves from accusing Asmara of orchestrating the rebellion to taking the war directly into Eritrea. That would fundamentally transform the conflict.

If Isaias Afwerki's calculation is that taking the war into Ethiopia is the best way to avoid fighting it inside Eritrea, Abiy may attempt to reverse that calculation by taking the war across the border using its superior airpower and drones' capability, allegedly provided by the UAE, to bomb Eritrean cities such as Assab and Asmara.

The risks would be significant. The Sudanese Armed Forces, Egypt and Saudi Arabia have developed important relationships with Asmara. At that point, Ethiopia would no longer simply be experiencing another civil war. It would sit at the center of a regional one.

There is an almost surreal footnote to all this. On 18 September, just days before the latest escalation, Washington allowed the national emergency created in response to the previous Tigray war to expire, terminating the Ethiopia and Eritrea related sanctions framework. Few days later, northern Ethiopia was at war again.

The timing obviously does not mean U.S. caused the crisis. But it captures something troubling about international diplomacy in the region. At precisely the moment when the Horn requires sophisticated mediation, the international system appears remarkably poorly equipped to provide them.

And just across the water, the map has changed too.

Earlier this month, the Iranian-backed Houthis captured Mokha and the strategic island of Perim inside Bab el-Mandeb, bringing Houthi military power to the mouth of the Red Sea and effectively to the doorstep of the Horn of Africa. From there, they are targeting Saudi ports and energy infrastructure critical to Riyadh's efforts to diversify oil-export routes away from Hormuz.

But the consequences extend far beyond Saudi Arabia. Bab el-Mandeb is one of the principal maritime chokepoints connecting Europe, Africa and Asia. For shipping companies, it matters little whether the Houthis say their immediate targets are Saudi, Israeli or American. What matters is risk. And risk has a price. Once insurers consider a maritime corridor unsafe, premiums rise, ships reroute and the economic geography of international trade begins to change.

Before the Red Sea crisis, roughly 60 vessels a day transited Bab el-Mandeb. More recently, total traffic has fallen to roughly 25–35 vessels per day, with container-ship transits dropping further into the low single digits in the last two weeks.

We have spoken with key shipping companies operating in the region. Europe–Asia and Europe–East Africa trade is increasingly being diverted away from Bab el-Mandeb, Suez and the Mediterranean and sent instead around the Cape of Good Hope and through the Atlantic. Since much of Horn and East Africa export is directed to Europe, the result is longer journeys, higher transport and insurance costs, and growing pressure on East African exporters as well as European consumers.

Over the coming months, if not years, we may increasingly see two different strategic spaces emerge: a Horn of Africa consumed by interconnected conflicts, and an eastern and southern Africa adapting to them - redirecting investment and infrastructure to manage maritime disruption. Ports such as Lamu and Dar es Salaam are likely to gain traffic and strategic importance as instability around Hormuz and Bab el-Mandeb forces governments and businesses to rethink supply chains and energy security.

African capital may already be moving faster than political institutions.

Aliko Dangote is a case in point. From plans for refining capacity in Lamu to energy infrastructure between Ethiopia and Djibouti, he is investing around precisely the vulnerabilities this new geopolitical environment is exposing - building more resilient African energy markets while forcing governments, investors and donors to play catch-up.

Perhaps that is the final paradox of the Great Red Sea War. While conflict is fragmenting the Horn and disrupting the maritime routes on which the region has long depended, it may simultaneously accelerate the emergence of a different economic geography further south.

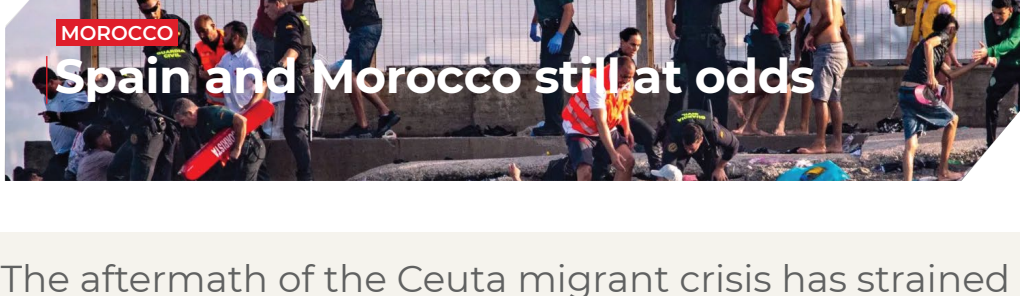
Wars redraw political maps. Increasingly, markets are redrawing them too.

Umberto Tavalato

Executive Director,
Med-Or Italian Foundation for Africa

UPDATES

NORTH AFRICA



Spain and Morocco still at odds

The aftermath of the Ceuta migrant crisis has strained relations between Madrid and Rabat. Unsolved dossiers center upon Morocco's use of migrant flows as a tool of geopolitical coercion, demarcation of maritime boundaries, impending renewal of trade agreements and the disputed status of the Ceuta and Melilla Spanish exclaves in North Africa. The crisis threatens to derail Spanish efforts to cultivate rapprochement with Morocco, a key goal of the Sanchez government since it declared support for a Moroccan-controlled Western Sahara in 2022.

LIBYA

Libya's long hot summer

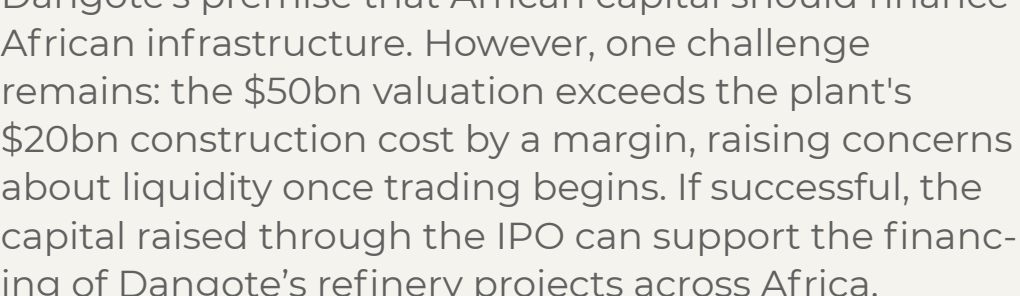
Blackouts and water scarcity have prompted protests in Tripoli, Central Bank governor Naji Issa tendered his resignation and the confrontation between the Haftars and the Tripoli-backed warlord Mohamed Wardougou is spreading from Fezzan to the Sahel. Such events suggest that the US mediation push and the UNSMIL call for national elections may follow rather optimistic timelines. In the current political and security climate, a botched power-sharing deal may spark factional conflict.

EGYPT

Egypt braces for escalation in the Red Sea

Resumption of war between Saudi Arabia and the Houthis is stifling Suez revenues, as Egypt's economy still struggles with the disruption of oil flows from Hormuz. Suez Canal fees represent a critical revenue stream for Egypt, which had already lost around 10% of its annual budget following the reduction on Red Sea shipping caused by the Houthis from 2024. Cairo is facing the ripple effects of war in Iran and the Gulf by strengthening political and military ties with Turkiye, seeking alternate supply routes, and securing IMF loans — which shows that the Fund still considers Egypt as too crucial to fail.

WEST AFRICA AND THE SAHEL



Dangote launches Africa's largest public offering

Dangote's Lagos refinery, the world's largest single-train oil plant, has launched Africa's largest IPO to date. At \$0.40 per share, the offering allows broad participation by Nigerian retail investors, reflecting Aliko Dangote's premise that African capital should finance African infrastructure. However, one challenge remains: the \$50bn valuation exceeds the plant's \$20bn construction cost by a margin, raising concerns about liquidity once trading begins. If successful, the capital raised through the IPO can support the financing of Dangote's refinery projects across Africa, strengthening the continent's resilience to oil shocks and positioning it as a major global supplier.

NIGER

US-Niger uranium deal

Washington approved up to \$414m in financing for Niger's Dasa uranium project. The deal marks a pragmatic re-engagement driven by resource access, two years after Niger expelled US troops, and comes while Niger is locked in a dispute with France's Orano over control of uranium assets. It's a signal that critical-minerals competition and strategy can override diplomatic ruptures in the Sahel. The pledge also confirms the US push to return to the Sahel after military coups had significantly strained relations.

GHANA

Ghana and Côte d'Ivoire align on cocoa production

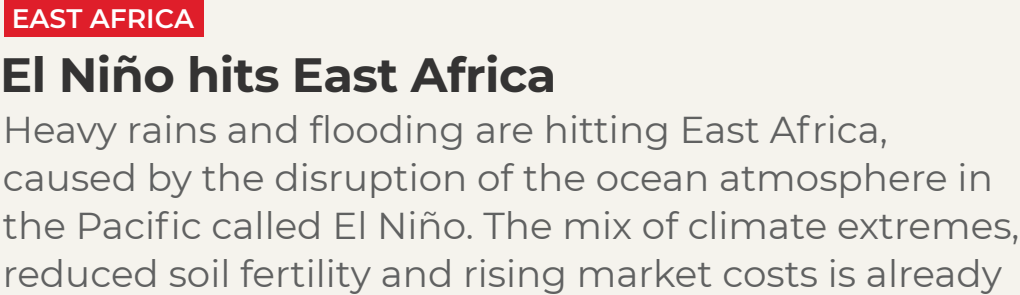
From September 1 Ghana and Côte d'Ivoire, which together constitute over 60% of global cocoa supply, began harmonising farmgate prices and unifying their crop calendar. The move signals a shift from competition to coordination between the two producers, aimed at strengthening their bargaining power against global buyers and reducing cross-border smuggling. It's an early test of whether African commodity producers can act as a unified bloc.

ALGERIA

Senegal and Eni sign MoU

The new MoU signed by Senegal and the Italian energy company Eni sets a framework to conduct exploratory studies and evaluate the potential, both geological and geophysical, of five offshore blocks. The agreement is part of Senegal's strategy to resume oil and gas exploration and promote its sedimentary basin. Sub-Saharan Africa is crucial for Italy's attempts to diversify hydrocarbon supply chains beyond the Gulf and North Africa.

EAST AFRICA AND THE HORN



Dangote announces strategic Djibouti-Ethiopia pipeline

Aliko Dangote is backing a \$660 million fuel pipeline linking Djibouti to Ethiopia, aimed at improving fuel supplies to the landlocked country. The 120km pipeline will transport critical petroleum products, such as jet fuel, diesel and petrol, and could cut delivery times by 80%. Works are expected to start in 18 months. For Ethiopia, which depends almost entirely on imports for petroleum derivatives, the project strengthens energy security by removing the bottleneck created by road transport. In parallel, the investment further reinforces Djibouti's geoeconomic centrality in the Red Sea, adding an energy component to its trade and digital pivot.

EAST AFRICA

El Niño hits East Africa

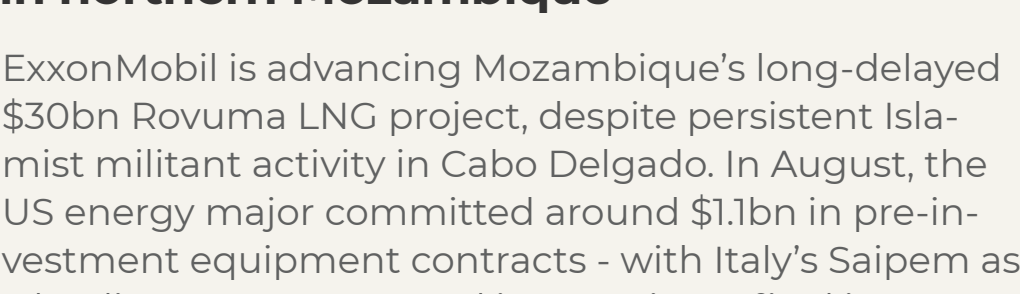
Heavy rains and flooding are hitting East Africa, caused by the disruption of the ocean atmosphere in the Pacific called El Niño. The mix of climate extremes, reduced soil fertility and rising market costs is already pushing the region towards crop failures, including in key breadbaskets like Kenya and Uganda. This, coupled with the violent impact of El Niño, could disrupt food production through floods and droughts, deepening shortages and increasing the risk of a prolonged food crisis.

DJIBOUTI

Disruptions in the Red Sea and effects on Djibouti

Renewed fighting in Yemen is driving a sharp increase in arrivals to Djibouti, with more than 3,400 people reaching the country within days and authorities preparing for up to 10,000. While the numbers remain relatively small, the influx adds pressure to a country with very limited water resources and a 90% dependence on imported food. Djibouti is also increasingly exposed to mounting regional headwinds, as instability around the Red Sea and Bab al-Mandab threatens trade, maritime security and its role as a regional logistics hub.

CENTRAL-SOUTHERN AFRICA & THE GREAT LAKES



Lobito Corridor set to double cargo volumes after new expansion

Lobito Atlantic Railway plans to double international cargo volumes along the Lobito Corridor to 800,000 tonnes in 2027, after receiving a first \$300 million drawdown from a \$753 million financing package. The funds will expand capacity, purchase rolling stock, rehabilitate damaged track and improve cross-border coordination. The push coincides with an August railway agreement between Angola and the DRC to ease mineral-transport bottlenecks. Lobito's capacity upgrades will facilitate investments in the Zambia's and DRC's mineral value chains, in line with the goals of the US, EU and African lenders.

MOZAMBIQUE

ExxonMobil revives Rovuma LNG project in northern Mozambique

ExxonMobil is advancing Mozambique's long-delayed \$30bn Rovuma LNG project, despite persistent Islamist militant activity in Cabo Delgado. In August, the US energy major committed around \$1.1bn in pre-investment equipment contracts - with Italy's Saipem as a leading contractor - and is targeting a final investment decision by the end of 2026. The project's revival reflects renewed global demand for LNG diversification following disruptions to Middle Eastern supplies and risks around the Strait of Hormuz. Security remains the principal obstacle, although several analysts describe the risks as acute but manageable.

ZAMBIA

President Hichilema secures a second mandate in Zambia

Zambia's 13 August election gave President Hakainde Hichilema a second five-year term with 60.5% of the vote. The result strengthens Hichilema's political position, but the election exposed democratic vulnerabilities, including post-election arrests of opposition figures on treason charges. The new mandate gives President Hichilema a chance to consolidate the structural economic reforms that helped Zambia recover from its 2020 default and rebuild investor confidence, especially in the mining sector. Job creation, energy and living costs remain critical challenges that the government will need to tackle.

In the Horn, existing conflicts are taking on new dimensions

New developments in Ethiopia and Sudan could now draw the wider region into an open, interconnected conflict.

BY: CHEPKORIR SAMBU

As Houthi attacks intensify on the Red Sea, the Horn of Africa is facing renewed conflict. New developments in Ethiopia and Sudan could now draw the wider region into an open, interconnected conflict.

Ethiopia is the newest flashpoint. On 20 September, seven rebel groups, led by the Tigray People's Liberation Front (TPLF), formally announced the Ethiopian Peoples' Forces Alliance for Survival, comprising the TPLF, Amhara Fano, Oromo Liberation Army, Ogaden National Liberation Front, and groups from Afar, Benishangul, and Gumuz. The alliance's stated objective is "to overthrow" Abiy Ahmed. On 23 September, war with the federal government begun.

This coalition is significant because its constituent groups have different goals and, in some cases, a history of fighting one another. Therefore, the formation does not necessarily signal a durable political coalition. Rather, it could prove a tactical alignment born of a common opposition to Abiy, but that risks fragmenting further in the face of full-scale conflict. With war back in Ethiopia, this possibility is no longer remote.

These shifts are inseparable from the wider region. Ethiopia has accused Eritrea of supporting the Alliance for Survival, while Washington has simultaneously lifted sanctions on Asmara, as it recalibrates its regional engagement. The U.S. has also agreed to maintain support for the peacekeeping mission in Somalia for another year before its planned withdrawal of funding. Washington, it appears, is driven by the need to strengthen relationships with states strategically positioned around the Red Sea.

Somalia itself remains caught between a federal-regional power struggle and the al-Shabaab insurgency, while South Sudan is in another period of political uncertainty ahead of its planned first elections in December, following Salva Kiir's recent dissolution of government.

Meanwhile, the Sudan war is effectively deadlocked. Despite this fact and stagnated mediation, fighting continues. In recent weeks, the Sudanese Armed Forces (SAF) has taken some territory in Blue Nile and Kordofan, previously held by the Rapid Support Forces (RSF), while a number of RSF commanders have defected to the army. SAF appears to be currently pursuing a three-pronged strategy: advancing militarily, orchestrating an "intra-Sudanese" political dialogue, and seeking African Union backing.

These developments seem to suggest that the balance may be tilting against the RSF. Yet, the paramilitary remains a significant force launching drone attacks across contested areas. Sudan continues to feed into the wider regional contest. In late August, General Mohamed Hamdan Dagalo visited Abiy Ahmed in Addis Ababa, likely to consolidate Ethiopian support and supply lines; Ethiopia is reportedly hosting a UAE-backed RSF base close to the Blue Nile border.

Diplomatically, while General Burhan seeks to strengthen SAF's influence over the AU Commission chair, Hemedti has attempted to counter it by sending representatives to engage President Évariste Ndayishimiye, the current AU (country) Chair. Amidst all this, Washington is frustrated by the two parties and their rejection of its proposed ceasefire plan.

Can diplomacy succeed amid external involvement in Eastern DRC?

The Congolese government and the Rwanda-backed M23/AFC rebel group have agreed on a new roadmap for peace

BY: CORRADO ÇOK

Peace negotiations on the Eastern DRC conflict have accelerated recently. On August 17-21, the Congolese government and the Rwanda-backed M23/AFC rebel group have agreed on a new roadmap for peace under the auspices of the US, Qatar, Togo and the African Union and allowed the first monitoring mission to deploy in Eastern DRC. One month later, representatives from Kinshasa and Kigali convened again in Geneva to address the implementation of the Washington Accords. Diplomatic momentum, however, has not translated into tangible de-escalation on the ground.

In September, South Kivu witnessed renewed attempts by the Congolese army and pro-government forces to free the province's vast highlands from the Twirwaneho, an armed group hailing from local Tutsi communities and allied to the M23/AFC. As the battle for South Kivu rages on, new clashes between the DRC army and its allies and the M23/AFC flared up in the coltan-rich Masisi district in North Kivu, where government forces have recently made territorial gains.

While the frontline has not significantly shifted for over one year, the conflict has been changing shape, both politically and militarily. Mirroring most contemporary battlefields, cheap drones have taken a primary (and deadly) role in the confrontation, with strikes even killing senior figures, like M23 spokesperson Willy Ngoma in February 2026, along with many civilians. The political developments though appear even more concerning, as they point to an increasing regionalisation and internationalisation of the conflict.

The war in Eastern DRC has long displayed a regional dimension. Against Rwanda's largely-documented support to the M23/AFC, Burundi has maintained a military deployment alongside Congolese forces since 2022. The US stepped up its involvement too. In 2025, Washington's role focused on diplomacy, as it spearheaded the mineral-centred peace agreement between the DRC and Rwanda. But as implementation faltered, the US began to match carrots with sticks by sanctioning the Rwandan military and four top generals. Meanwhile Erik Prince's contractors – a man close to President Donald Trump – have deployed along the Congolese army and supported operations in South Kivu.

Other external players have deepened their engagement in Eastern DRC. Along with Erik Prince's private military group, Israeli advisors have trained Congolese special force battalions, which are being deployed in South Kivu. As DRC's security partnership with Tel Aviv grows, President Tshisekedi met with PM Benjamin Netanyahu in Israel in early September, when he reiterated his commitment to move the Congolese embassy to Jerusalem.

Since last year, the United Arab Emirates has enhanced its security cooperation and mining investments in the DRC, where DP World already manages a concession in the country's key port of Banana. President Tshisekedi recently met with President Mohamed bin Zayed, underscoring robust bilateral ties. However, the UAE maintains significant economic interests in Rwanda as well, where again DP World manages a major dry port. Meanwhile, Rwanda is arguably the closest economic partner of Qatar in sub-Saharan Africa, with a major investment in Kigali's national carrier and international airport. Türkiye also maintains strong relations with both countries.

The involvement of external players - especially Middle Eastern powers - in the Great Lakes region is certainly on the rise. While relations are more cross-cutting than in other regions, such as the Horn of Africa, growing external support comes at a time when warring parties continue to resist pressures to cease hostilities. In such a context, it risks emboldening them further and therefore weakening international peace efforts in the Eastern DRC.

Tchiani survives his own play-book thanks to Moscow

The drivers behind the 2023 coup still explain the country's instability.

BY: MATILDE VECCHIONI

On 28 August, a faction of the Nigerien armed forces calling itself the Armed Forces for the Restoration of the Fatherland attempted to unseat General Abdourahamane Tchiani. The mutineers targeted the nodes of every Nigerien putsch since 1974: the presidential palace, the state broadcaster (ORTN), and Air Base 101 at Diori Hamani airport. By midday on 29 August, presidential guard units had restored control and state television reported dozens of mutineers killed or arrested. The attempt failed. However, its significance lies in its source: the defecting soldiers were young officials, deployed on the frontlines of the battle against jihadist groups, and therefore exposed to Niger's deteriorating security.

The drivers behind the 2023 coup still explain the country's instability. At the time, Tchiani's seizure of power from President Mohamed Bazoum rested on a main claim: that the elected government had failed to address jihadist violence. Three years on, the situation that justified the intervention has not improved. The junta expelled French forces, ended basing agreements with the United States, and shifted toward a security partnership with Russia. Yet, attacks on the armed forces and critical infrastructure have intensified since 2023, including in Tillabéri. This is where the grievance sits: within the security apparatus itself rather than among civilians.

In this context, a fundamental detail is who restored order, which was, unsurprisingly, Russia. The Africa Corps, present in Niger since 2024, appears to have deployed 200 personnel in the counter-attack, accounting for most of the total contingent responding to the coup. This counters the junta's sovereignty narrative: expelling Western forces was framed as the recovery of national autonomy, but the junta survives its own struggles through a foreign force. Dependence, therefore, seems to be reassigned rather than ended. Surprisingly, Algeria also acted, dispatching four fighter aircraft and supporting equipment – and marking a major shift from its anti-interventionist rhetoric. For Algeria, Tchiani's survival is clearly preferable to the uncertainty of another turnover next door.

Those formally expected to act did not. Niger's mutual defence agreement with Mali and Burkina Faso under the Alliance of Sahel States (AES) faced in this case its first real test and failed. The Alliance limited itself to condemning the attempted coup, and Bamako and Ouagadougou stayed still until the outcome was settled. For the moment, it seems that the AES has functioned as an instrument for collective exit, from ECOWAS and from Western security architecture, but not as one for collective defence.

And then there's Italy, the only Western power to have retained a military presence in Niger. With roughly 300 personnel stationed at Base 101, Italian trainers have operated within the same space of Russian contractors since 2024. Yet while Russian actors have been actively involved in the recent counter-attack, Italian personnel have not engaged in fighting. This is consistent with MISIN's training mandate, but it also highlights a distinction: Italy's presence seems to preserve access and channels for cooperation on counter-terrorism and migration but doesn't necessarily translate into influence over the government's trajectory.

What August exposed, overall, is a hierarchy of dependence: the foreign guarantors with the strongest interest in Tchiani's survival did the fighting, while the regional actors formally bound to help did not. None of this resolves the vulnerability the coup unveiled, nor does it strengthen Tchiani's legitimacy, which still rests on a security promise the junta cannot keep on its own.

Algeria breaks ties to the United Arab Emirates

Algeria's dispute with the Emirates is rooted in diverging regional allegiances.

BY: FRANCESCO MERIANO

On Thursday 10th September, Algeria officially severed ties with the United Arab Emirates and closed its airspace to UAE flights. Anwar Gargash, chief advisor to UAE president Mohamed bin Zayed, promptly answered that bilateral relations should be conducted according to "rationality, communication and clarity of interests" rather than through "riddles and signals that need decoding" – a jab at Algerian president Abdelmadjid Tebboune, who in the past few years had often accused a nameless Gulf kingdom, strongly implied to be the UAE, of interfering in Algiers' affairs.

Algeria's dispute with the Emirates is rooted in diverging regional allegiances. A key point of contention is Emirati support for Morocco, Algeria's historical rival. Having become Morocco's chief Arab financier in the past few years, the UAE also backed Rabat's claim over Western Sahara in order to unlock substantial energy investments in the disputed territory, striking a blow against Algeria's waning support for Sahrawi independence.

After both Morocco and the UAE normalized ties with Israel by joining the US backed Abraham Accords in 2020, the UAE facilitated military and technology transfers from Israel and the US to Morocco. Seen from Algeria, these transfers could grant Rabat a qualitative edge in the ongoing arms race with its eastern neighbour.

The Algerian press also floated the idea that Emirati backing of Rabat had proved crucial to sway Nigeria in favour of a coastal pipeline around West Africa to Morocco. The project provides an alternative to the trans-Saharan pipeline between Nigeria and Algeria via the Sahel, which suffered slowdowns. Greenlighting the Nigeria-Morocco project also boosted Rabat's ambitions over Western Sahara, as the pipeline, designed to cross eleven coastal African states, is set to pass through it.

Beside its closeness to Morocco, Algeria looks with concern at Abu Dhabi's alleged ties to both the Sudanese rebels of the Rapid Support Forces and the Libyan warlord Khalifa Haftar, a partnership which Algiers fears may help regionalize the Sudan war and jeopardise its south-eastern borders. What is more, Algiers worries that the UAE record of supporting secessionist groups – the former STC in Yemen and Somaliland in Somalia – may inflame Kabyle Amazigh minorities in northern Algeria. In May 2025, Algeria had accused the UAE of having aired an interview with Mohamed Belghit – a controversial Algerian public figure who had decried Amazigh culture – in order to sow dissent among Kabyle communities and boost support for the Paris-based Kabyle self-determination movement (MAK).

Algeria's move also comes on the backdrop of a wider rupture between the UAE and Saudi Arabia over geo-economic ambitions and regional influence. As it spills over several regional theatres, the Riyadh-Abu Dhabi rivalry is coalescing around two blocs, with Saudi Arabia backed by Türkiye, Egypt and Pakistan and the UAE supported by Israel and Ethiopia.

In this scenario, the Morocco-Algeria rivalry could double as a new arena for the Gulf confrontation, with Morocco's ties to Israel and the UAE prompting Algeria to seek Saudi support. Algiers, who has long sought to attract Gulf investments with limited results, may see the brewing showdown as an opportunity to cosy up to Riyadh: this may also explain why Algeria, whose grudge with the UAE has simmered for years, chose this time to escalate the dispute and start pointing fingers.

Mozambique's LNG: a global and national lifeline

While the streets contest FRELIMO's political legitimacy, the government is simultaneously fighting to secure its economic lifeline in the Rovuma Basin.

BY: LUCIANO POLLICHIENI

Mozambique is navigating a turbulent phase of domestic political turmoil. The political demonstrations that emerged in Mozambique this month were primarily convened by the leadership of the National Alliance for a Free and Autonomous Mozambique (ANAMOLA), loyal to opposition leader Venâncio Mondlane, alongside youth activist coalitions and civil society groups. The movement was triggered by the formal indictment served to Mondlane on August 25, requiring him to stand trial before the Supreme Court on five criminal counts - including instigation to terrorism and incitement to collective disobedience. Convinced that the judiciary was being weaponized by the ruling FRELIMO establishment, Mondlane supporters mobilized in public gatherings and across digital platforms to demand a fully independent proceeding, international legal oversight, and a nationwide livestream of the court hearings.

While this mobilization succeeded in placing intense domestic and international scrutiny on Mozambique's judicial system, its primary transparency objective was ultimately not achieved. On September 21, 2026, the Supreme Court rejected the popular request to broadcast the trial, officially rescheduling it for November 17, 2026. The wide demographic nature of these protests raises questions about whether they stem from political disenfranchisement, economic frustration, or both. What remains certain is that this mobilization arrives at a make-or-break moment for FRELIMO's overarching geopolitical plan.

While the streets contest FRELIMO's political legitimacy, the government is simultaneously fighting to secure its economic lifeline in the Rovuma Basin. Maputo is currently challenging a \$2 billion discrepancy in cost recovery claims submitted by French energy major TotalEnergies following the nearly five-year suspension of its \$20 billion liquefied natural gas (LNG) megaproject in \$20 billion liquefied natural gas (LNG) megaproject in Cabo Delgado due to security concerns. An independent audit by British consultancy Bayphase revealed that of the approximately \$5 billion in "force majeure" expenses claimed by the operator since April 2021, only 60 percent are adequately documented.

This boardroom friction is further exacerbated by the deteriorating reality on the ground. Total's project operates in northern Mozambique's highly-volatile environment, where jihadist insurgents are actively expanding their scope. Most recently, the burning of vital arable land in Muidumbe and Lutete by Islamic State-linked insurgents underscores the acute instability surrounding the Afungi peninsula construction site in Cabo Delgado. These attacks threaten to precipitate localized famine, accelerating internal displacement and providing fertile ground for radical recruitment. The result is a starkly bifurcated reality: a heavily militarized, corporate-secured LNG enclave in Afungi surrounded by an impoverished, insurgency-ravaged hinterland.

The convergence of these political, financial, and security crises carries risks for regional energy markets and the strategic balance in the Indian Ocean. TotalEnergies' revised target of initiating LNG deliveries by 2029 makes Mozambique a critical, albeit delayed, node in Europe's long-term strategy to replace Russian gas volumes. If the financial standoff protracts or security guarantees fail, Western capital may retreat, generating a strategic vacuum that non-Western actors - particularly China - are well-positioned to fill.

Italy-Africa energy cooperation: *Enel's new wind farm cluster in South Africa*

In September 2026, Flavio Cattaneo, CEO of Enel - Italy's largest energy company and a member of Med-Or Italian Foundation – officially inaugurated the Group's new wind project in Impofu, South Africa. With an installed capacity of 336 MW and approximately 120 km of overhead transmission infrastructure, Impofu is one of the largest private greenfield wind projects in South Africa, with the longest privately built high-voltage transmission line in the country. Reflecting the spirit of Italy-Africa cooperation, Impofu illustrates the potential of combining private investment in energy transition with infrastructure development and long-term local growth.

The project also adds a concrete milestone to Italy's growing energy partnership with Africa and consolidates Enel's position as the leading renewable energy operator in South Africa, with 15 plants totalling 1.6 GW and representing approximately 10% of the country's renewable energy capacity. Today, Pretoria constitutes one of the continent's most advanced markets, with the potential to serve as a regional hub for development cooperation and industrial projects across Sub-Saharan Africa. Led by President Cyril Ramaphosa, the country is pursuing a long-term transformation of its energy mix, targeting more than 40% of energy supply from clean and renewable sources by 2030, while diversifying its power system and expanding the national transmission grid, in line with its Just Energy Transition Investment Plan (JETIP). Bolstering its attractiveness to investors also requires greater private participation beyond Eskom, an independent transmission system operator and a more competitive electricity market.

Impofu fits into this evolving landscape: a benchmark for the country's industrial decarbonization process, it was designated by the South African government as a Strategic Integrated Project and priority infrastructure. Despite its climate ambitions and commitment to energy transition, South Africa remains exposed to structural vulnerabilities. These include a fragile energy grid and power disruptions – despite significant progress since the load-shedding crisis of 2022-2023 – and an energy system still heavily dependent on fossil fuels, with coal accounting for around 80% of electricity generation.

Recent energy shocks and higher fossil-fuel costs have revitalized the country's commitment to energy diversification and international partnerships for energy security. Impofu is a concrete step in this process, for South Africa and for partners such as Italy and its companies. Enel's project combines renewable generation and grid infrastructure with local economic and social benefits, involving up to 2,000 workers during construction, generating around 800 additional jobs in surrounding communities and engaging more than 20 local companies. The project can generate around 1.2 TWh of electricity annually, equivalent to the consumption of approximately 490,000 households, while avoiding more than 1.1 million tonnes of CO₂ emissions each year. Beyond these figures, it has also involved South African street artists and school students in transforming wind turbines into open-air works of art through dedicated murals. As a complementary pillar, Enel Foundation supports South Africa's energy transition through education and capacity building, delivering programmes for students, professionals, policy-makers and energy leaders. Through initiatives such as Open Global Power, the Southern Africa Executive School and dedicated re-skilling programmes, the Foundation contributes to developing the skills and expertise needed to accelerate the country's transition towards a just and inclusive energy system.

Today, Impofu highlights the strategic opportunity for new investment in a country like South Africa with strong potential to increasingly align with Italy's broader strategy in Africa and the objectives of the Mattei Plan, particularly in promoting sustainable value chains, infrastructure development and capacity-building across the continent.

PHOTO GALLERY



Med-Or Chairman Marco Minniti signs a Memorandum of Understanding with H.E. Thérèse Kayikwamba Wagner, Minister of Foreign Affairs of the Democratic Republic of the Congo, underpinning future cooperation between the DRC and the Foundation.



A group picture portraying Med-Or leadership and the DRC delegation led by Foreign Minister, H.E. Thérèse Kayikwamba Wagner, for the signature of the MoU at Med-Or Italian Foundation's headquarters in Rome.



Med-Or Africa advisor Corrado Čok talks at a panel on the implications on Somalia of global aid shift organised by Puntland Development and Research Center (PDRC) in Garowe on September 21-23, 2026.



Med-Or Africa Executive Director Umberto Tavolato and advisor Chepkorir Sambu meet John Seroney, CEO of a leading coffee company in Kenya to discuss challenges and opportunities in the local coffee industry.



Bonifiche Ferraresi Spa (member of Med-Or's board) inaugurated the Institute of Advanced Science for Agriculture (IASA), a Piano Mattei initiative that provides advanced tertiary education intersecting scientific, academic and industrial innovation to talented African students.



Med-Or Africa participating in a discussion dedicated to critical raw materials and related scientific cooperation between Italy and Africa at RemTech Expo 2026

AUTHORS

Chepkorir Sambu
Policy Adviser,
Med-Or Italian Foundation for Africa

Corrado Čok
Research Adviser,
Med-Or Italian Foundation for Africa

Francesco Meriano
Policy Analyst,
Med-Or Italian Foundation

Luciano Pollichieni
Adviser,
Med-Or Italian Foundation

Matilde Vecchioni
Programme Manager,
Med-Or Italian Foundation

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

EDITORIAL TEAM

Asja Amail
International Relations and Special Projects
Officer, Med-Or Italian Foundation

Danielle Morland
Communication Adviser,
Med-Or Italian Foundation for Africa

Sialo Nyongesa
Creative Designer,
Med-Or Italian Foundation for Africa