

## AFRICA RISK CONSULTING

### Mozambique Monthly Briefing September 2025

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#### Mozambique Summary 10 September 2025

*The justice, constitutional and religious affairs ministry officially approves opposition leader Venancio Mondlane's new political party, the Aliança Nacional para um Moçambique Livre e Autónomo (Anamola), which will likely emerge as the leading opposition force in Mozambique. An International Monetary Fund (IMF) staff team conducts a visit to Mozambique and reiterates the need for fiscal consolidation. Qatar's Al Mansour Holdings commits to invest \$20 billion in numerous key economic sectors in Mozambique, including the agriculture and energy industries. President Daniel Chapo (2025-present) expects the French energy giant, TotalEnergies, to lift its force majeure on its LNG project in Cabo Delgado Province and resume development before the end of September. To ensure that the security environment near the project remains stable, Chapo signs a Status of Forces Agreement with Rwanda as part of the effort to keep Rwandan security forces in Cabo Delgado.*

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#### New opposition party was approved

Opposition leader **Venancio Mondlane** [announced](#) on 15 August that the justice, constitutional and religious affairs ministry officially approved the creation of his new political party, the **Aliança Nacional para um Moçambique Livre e Autónomo (Anamola)**, which is expected to be a significant force in Mozambican politics due to Mondlane's status as Mozambique's leading opposition figure.

Mondlane initially [announced](#) the creation of his party in April, but at the time, the party's name was officially abbreviated to **Anamalala** which translates to 'it's over', or 'it's going to finish' in Mozambique's **Makua** language. Mondlane's supporters used the term as a rallying cry both during his 2024 presidential election campaign and during the wave of protests that followed the disputed election. However, on 28 May, justice, constitutional, and religious affairs minister, **Mateus Saize**, [rejected](#) Anamalala's registration, claiming that the use of a term in one of Mozambique's local languages could not be used as this would have "*ethnolinguistic connotations*" and potentially promote ethnic divisions and undermine national unity. This was unlikely a legitimate objection but rather an effort by Saize to create friction for Mondlane in the party registration process and undermine whatever momentum the new party may have.

Mondlane was forced to resubmit the party's registration documentation with the amended abbreviation, with the party now referred to as Anamola. The party's official approval is an important step for Mondlane's efforts to establish a more permanent political movement and for Mozambique's opposition politics. Mondlane emerged as the dominant force in Mozambican opposition politics during the 2024 general election. He came second in the presidential election, and the **Partido Otimista pelo Desenvolvimento de Moçambique (Podemos)** displaced the **Resistência Nacional Moçambicana (Renamo)** as Mozambique's official opposition due to its alliance with Mondlane during the election. Mondlane and Podemos have since fallen out over the party's decision to take up its seats in Mozambique's legislature, the **Assembleia da República**.

The creation of Anamola will provide a political organisation for Mondlane's supporters to formally belong to and vote for in future elections. Mondlane will now need to build the party's internal structures and national presence. The opposition leader has proven to be an effective campaigner, but his ability to manage and build a lasting organisation will now be tested. Mondlane has around two-and-a-half years to build Anamola as a party before the 2028 municipal election, when the party will contest its first elections.

Importantly, Mondlane also appears to now be more willing to participate in Mozambique's more formal politics. On 1 September, [he took up his position](#) on the **Conselho de Estado** (council of state); this is a statutory body which advises the president on matters of national importance. President **Daniel Chapo** (2025-present) oversaw the inaugural session of the current council of state on the same date. Mondlane has also reaffirmed his desire to participate in the upcoming inclusive national dialogue, which is set to begin on 10 September and is [advocating for Anamola to be included](#) in the dialogue. His desire to participate in such normal politics is a promising development for Mozambique, as it suggests that Mondlane realises that there is little public appetite for additional anti-government protests. However, he is expected to use his position on the council of the state and the inclusive national dialogue to criticise the government and other opposition parties.

### International Monetary Fund completes visit to Mozambique

An **International Monetary Fund (IMF)** staff team [conducted](#) a visit to Mozambique between 21 and 29 August, holding meetings with senior fiscal and economic officials on the country's principal economic and financial challenges and the policies needed to address these challenges while supporting macroeconomic stability. This visit was particularly significant as Mozambique and the IMF are currently in discussions over a new **Extended Credit Facility (ECF)** arrangement.

The IMF suspended its previous arrangement with Mozambique in April in response to the Mozambican government's request for a new agreement (*see ARC Briefing Mozambique May 2025*). This request was largely driven by the government's decision to reintroduce value-added tax (VAT) exemptions on certain products to address cost-of-living concerns as anger over inflation and the cost of living was helping to drive anti-government protests. Removing these exemptions had been a critical point in the last ECF arrangement, which called for the government to improve its fiscal consolidation and revenue mobilisation. The economic negative impact of post-election unrest has fundamentally altered Mozambique's economic reality, and the government wants this to be reflected in an amended ECF arrangement.

The IMF team did acknowledge the major economic impact of the post-election unrest but still stressed Mozambique's need for front-loaded fiscal consolidation to restore fiscal sustainability, reduce financing needs, and address the country's debt burden. The IMF team's post-mission review was generally positive, noting that Mozambique is facing increased investor interest and an improved economic forecast; however, any new ECF arrangement will require the government to make concessions by improving fiscal consolidation and revenue mobilisation.

### Qatari group makes major investment commitment

In a positive economic development, Mozambique's government reached a \$20 billion investment agreement with Qatar's **Al Mansour Holdings** on 26 August. **Gabinete de Reformas e Projectos Estratégicos** (office of reforms and strategic projects) executive coordinator of **Oswaldo Machatine** [signed](#) the agreement with Al Mansour Holdings' **Sheikh Mansour Bin Jabor Jassim Al Thani**. After the signing, Al Thani met with Chapo to discuss the Qatari group's planned investments.

Al Mansour Holdings is closely connected to the Qatari royal family and Al Thani is a relative of the Emir of Qatar, **Tamim bin Hamad bin Khalifa Al Thani** (2013-present). Accordingly, the company's investment is viewed as a state-backed action by the Qatari ruling family. Although the specific planned investments have not been publicly detailed, Mozambican officials [claimed](#) that Al Mansour Holdings will invest in numerous priority sectors, especially agriculture, infrastructure and energy. If this promised investment materialises, it will provide a major boost for Mozambique's economy. For context, the IMF [estimated](#) that Mozambique's real GDP in 2024 was only \$21.94 billion. As such, this investment agreement is nearly the same size as Mozambique's entire economy.

### TotalEnergies set to resume LNG development this month

Mozambique's economy will also be boosted by the anticipated resumption of **France**-headquartered **TotalEnergies**-led \$20 billion liquified natural gas (LNG) development in **Cabo Delgado Province**

this month. [Chapo](#) announced on 21 August that Mozambique expects TotalEnergies to withdraw its force majeure on the project and resume development before the end of September. Chapo made this statement on the sidelines of the **Tokyo International Conference on African Development (TICAD)** summit in **Japan**, where he was meeting with investors in Mozambique's LNG sector.

TotalEnergies declared force majeure on the project in April 2021 after the attack on **Palma** by the **Ahlu Sunnah wa Jama'ah (ASWJ)** Islamist militant group. This was a major setback for Mozambique's LNG sector, as the TotalEnergies-led project is the largest planned development in Cabo Delgado. The suspension also led numerous other projects and contracts to be suspended.

The impending resumption of the project will likely boost Mozambique's LNG sector and motivate other players in the industry to resume their own developments. The project's resumption will bring numerous contractors and subcontractors back to Cabo Delgado and lead to a sharp increase in investment in the sector over the medium-term horizon.

Chapo's expectation that TotalEnergies will lift the force majeure suggests that the French energy giant is satisfied with improved security conditions in Palma, where the project is located. The security environment in the district has improved dramatically over the past four years, especially around the TotalEnergies project site, where a large number of Mozambican security forces have been deployed.

However, the government will still be concerned by ASWJ's continued strong presence elsewhere in the province. The militant remains active in much of Cabo Delgado, as illustrated by the fact that [at least 29 people were killed](#) in insurgent attacks in July alone, while a further 56,000 were displaced.

ASWJ's continued capacity to carry out attacks has underscored Mozambique's dependence on its security assistance, especially from the **Rwandan Defence Force (RDF)**, which has maintained a troop contingent in Cabo Delgado since mid-2021. The RDF have been essential to recapturing ASWJ territory and securing Palma. As such, it was [important](#) for Cabo Delgado's security that Mozambique and Rwanda signed a **Status of Forces Agreement (SOFA)** on 27 August, which establishes a legal framework for troops deployed in a country.

Chapo and his Rwandan counterpart, President **Paul Kagame** (2000-present), signed the agreement while Chapo was on a visit to **Kigali** (Rwanda). Notably, this was the first SOFA publicly signed between the two countries, which highlighted the initial secretive nature of the conditions of the RDF deployment. The signing of the SOFA indicates that Chapo wants to normalise Mozambique and Rwanda's security relationship. It also indicates that both governments intend for the RDF to maintain its deployment in Mozambique for the foreseeable future. This is important as the Mozambican military is not considered able to manage the insurgency on its own.

## Planner

10 Sep 2025 **Maputo (Mozambique)** Inclusive National Dialogue begins;  
 22-25 Sep 2025 **Maputo (Mozambique)** **Mozambique Gas and Power Summit and Exhibition**;  
 8-9 Dec 2025 **Lisbon (Portugal)** Mozambique-Portugal Summit;  
 2025 **(Mozambique)** **Renamo** to hold its **National Council** meeting (date to be confirmed);

## Chronology

5 Sep 2025 **Maputo (Mozambique)** *AIM*. State-owned oil and gas firm, **Empresa Nacional de Hidrocarbonetos (ENH)**, announces that it has acquired all shares of **ENH-KOGAS, SA**, which distributes piped natural gas in Maputo and **Marracuene**;  
 6 Sep 2025 **Maputo (Mozambique)** *Club of Mozambique*. Maputo city court orders the release former presidential candidate **Venâncio Mondlane's** financial advisor **Glória Nobre Chire**, who has been in pre-trial detention since March;

5 Sep 2025 **Maputo (Mozambique) AIM**. The **South Korean International Cooperation Agency (KOICA)** pledges \$14.8m to fund the construction of a primary school in **Maputo Province**;

5 Sep 2025 **Maputo (Mozambique) AIM**. Health officials confirm four more Mpox infections, bringing the total number of confirmed infections in Mozambique to 74;

4 Sep 2025 **Maputo (Mozambique) Club of Mozambique**. Finance ministry officials reveal that Mozambique's debt servicing costs declined by 7.5% in the first half of 2025 compared with the same period in 2024;

3 Sep 2025 **Maputo (Mozambique) AIM**. **China's** ambassador to Mozambique, **Zheng Xuan**, reveals that bilateral trade between Mozambique and China reached \$5.18 billion in 2024;

3 Sep 2025 **Maputo (Mozambique) AIM**. The **World Bank** approves \$201m to support healthcare projects in Mozambique;

1 Sep 2025 **Maputo (Mozambique) AIM**. President **Daniel Chapo** inaugurates the **Conselho de Estado** (council of state), which advises the president on issues of national importance;

30 Aug 2025 **Maputo (Mozambique) AIM**. President **Daniel Chapo** announces that the inclusive national dialogue will begin on 10 September;

30 Aug 2025 **Maputo (Mozambique) AIM**. Prime minister **Benvinda Levi** announces that the government confirmed 115 investment projects worth a combined \$5 billion in the first half of 2025;

29 Aug 2025 **Maputo (Mozambique) AIM**. State-owned electricity utility, **Electricidade de Moçambique (EdM)**, reveals it has approved \$700m worth of transmission projects;

27 Aug 2025 **Maputo (Mozambique) Zitamar**. Residents in **Macomia** district (**Cabo Delgado Province**) accuse the Mozambican navy of killing five civilian sailors transporting goods off the province's coast;

26 Aug 2025 **Lupliche (Mozambique) AIM**. Officials announce that police detained ten Chinese nationals for the illegal possession of 22 firearms in Lupliche (**Niassa Province**);

26 Aug 2025 **Maputo (Mozambique) AIM**. Insurgents kill two people in an attack in the village of **Mapate** in **Muidumbe** district (**Cabo Delgado Province**);

24 Aug 2025 **Maputo (Mozambique) AIM**. Secretary of state for commerce **António Grispos** claims that Mozambique loses between \$10 billion and \$15 billion to illegal exports and tax evasion every year;

20 Aug 2025 **Maputo (Mozambique) AIM**. **South Africa's** Chargé d'Affaires in Mozambique, **Puleng Chaba**, reveals that bilateral trade between Mozambique and South Africa is now worth \$2 billion a year;

17 Aug 2025 **Maputo (Mozambique) AIM**. President **Daniel Chapo** promises that his administration is strengthening the capacity of the country's security forces to fight insurgents in **Cabo Delgado Province**;

14 Aug 2025 **Maputo (Mozambique) TimesLive**. **Australian** diversified mining and metals company **South32** warns that it will be forced to shut down its aluminium smelter in Mozambique, **Mozal**, in 2026 if it cannot reach an agreement with government over electricity supply to the plant, potentially endangering over 37,000 direct and indirect jobs;

13 Aug 2025 **Maputo (Mozambique) AIM**. Education officials reveal that over 60 schools, which closed due to terrorist attacks in **Chiure** district (**Cabo Delgado Province**), have reopened;

9 Aug 2025 **Maputo (Mozambique) AIM**. State-owned oil and gas firm, **Empresa Nacional de Hidrocarbonetos (ENH)**, announces its plans to become a project operator in Mozambique's oil and gas sector rather than a minor partner in major projects.

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