

Cabo Delgado, the northern coastal part of Mozambique: turbulent past, chaotic present... and prosperous future?

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The importance of Mozambique's northern coastal province of Cabo Delgado has increased with the outbreak of the Russian-Ukrainian war, although it was no less important before. In the last ten years, large reserves of natural gas and gemstones have been discovered and the last few years have seen the rise of a jihadist movement under the aegis of the Islamic State. Russian aggression has increased Europe's appetite for natural gas in its desire to reduce Russian energy dependence. The discovery of natural gas in Mozambique has created huge opportunities for the poor country, as international gas companies have invested heavily in Cabo Delgado. Although the past and present of the region is very chaotic and unstable, the future could be prosperous if the problems highlighted in this study are mitigated.

Keywords: Mozambique, Cabo Delgado, ASWJ, LNG, FLNG, interventional forces

1. Introduction

On 24 February 2022, Russia invaded Ukraine, causing a turmoil in almost every aspect of life. The effects of the protraction of the war and the aftermath of the coronavirus epidemic also affected international political and economic developments. Rising commodity prices and inflation pose a major challenge to policy makers in both developing and developed countries.

When we look at natural resources, including natural gas, there has been a fundamental change in the last year. The European Union has relied heavily on pipeline gas, because until the war Russia dominated pipeline gas imports, which were almost 40%. Natural gas is important for the European Union, accounting for 25% of its energy needs, equivalent to about 400 billion cubic metres. With domestic production at 10%, import dependence remains significant. With the outbreak of the war, the EU has had to change its strategy and has started to reduce its dependence on Russia and the energy it provides. Even though Norway has taken the position over from Russia as the main pipeline gas importer, the EU's energy strategy is shifting towards liquefied natural gas (LNG). As a liquid, LNG takes up about 600 times less volume than gas at normal barometric pressure, which makes it easier to transport over long distances without pipelines, usually in specially designed ships. LNG supplies are available in a wide range of countries around the world and the global LNG market is growing rapidly. The EU has imported 98 billion cubic metres of LNG as of early 2022. This is 39 cubic metres more than at the same point in 2021 (European Commission, 2022).

Between January and September 2022, the United States (44%), Russia (17%) and Qatar (13%) accounted for the majority of the EU's LNG imports. Globally, the United States, Australia and Qatar are the most relevant (European Commission, 2022). However, other sources should not be overlooked. Africa's

role may become increasingly important for the world because of its rich natural resources, and the same is true for the natural gas industry. The impact of the war on the LNG market has led to a kind of Hunger Games, which is exacerbated by the fact that a new natural gas field is discovered. This has happened in one of Africa's poorest countries, Mozambique, and one of its poorest provinces, Cabo Delgado.

The theoretical basis of the study is the dependency principle, which is essentially Marxist in origin, but nevertheless determinant for the political economy and international relations of Third World states. This phenomenon first appeared in Paul A. Baran's 1957 book *The Political Economy of Growth*, after which a number of famous scholars have addressed this global problem, including Andre Gunder Frank, Samir Amin, Theotonia Dos Santos and Claude Ake (Ghosh, 2001). The starting point is the Dos Santos definition of dependence, which is „a situation in which the economy of certain countries is conditioned by the development and expansion of another economy to which the former is subjected” (Dos Santos, 1970:231). Dos Santos was basically looking at Latin America, but it is also true for Africa, but in the case of the latter we have to add the phenomenon of neo-colonialism, whereby the state is sovereign and autonomous in theory, but in practice its political and economic space is determined from outside. Its conceptualiser was Kwame Nkrumah, who first described it in his 1965 work, *Neo-Colonialism, the Last Stage of imperialism* (Eureka, 2018). A practical example of this is the incursion of transnational corporations, which will be discussed later in relation to the LNG project. This raises the question of whether the discovery of abundant natural gas in Mozambique will really bring about the economic and political empowerment of the country or whether it will widen the gap between the core and the periphery, namely the Western world and Mozambique.

The study also searches for answers to the question: can Mozambique, and especially Cabo Delgado, one of the most underdeveloped provinces, be a winner of the Russian-Ukrainian war? In other words, can the political leadership in Mozambique be able to take advantage of the huge amount of natural gas revenues available and strengthen the country? In order to answer this question, it is necessary to provide a detailed description of Cabo Delgado and the difficult circumstances in which it faces, given the serious security crisis in the region, which is a major obstacle to the implementation of natural gas exploitation projects. It is also necessary to describe the quantities of gas involved, the parties involved in the exploitation projects and the status of these projects at the time of writing.

2. Cabo Delgado

Cabo Delgado is Mozambique's northernmost province, bordered by Tanzania to the north, Niassa province to the west, Nampula province to the south and the Indian Ocean to the east (Matsinhe–Valoi, 2019). The region is covered in dense forests and shrubs, which are ideal for the establishment and activities of criminal organisations, as the impenetrable vegetation makes certain areas difficult to access. Small islands are sparsely populated or almost completely uninhabited (Gartenstein-Ross et al., 2021).

Figure 1. The map of Cabo Delgado



Source: Lister (2020)

In Mozambique, which has a population of almost 33 million, it is estimated that the instability and steadily deteriorating economic situation in Cabo Delgado, with a population of more than 2.5 million (Joshua Project, 2023a) is due to hostilities between two ethnic groups: the Makonde ethnic group of more than 500,000 (Joshua Project, 2023b), which lives in the interior of the region, and the Mwani ethnic group of around 160,000, which is located on the coast (Joshua Project, 2023c).

More than a third of Mozambique's Muslim population lives in the north of the country, while 54% of Cabo Delgado is Muslim, but there are also significant numbers of Christians. The Makonde ethnic group includes both Muslims and Christians who are adherents of the ruling FRELIMO party, while the Mwani ethnic group has a massive Muslim majority, known primarily for their support of the main opposition party, RENAMO. In both rival ethnic groups, the Muslim religion is dominant, only the Mwani youth hold more radical views and have moved from a peaceful version of Sufi Islam to Salafism and, within that, to the Wahhabi school of thoughts, thanks to the presence of radical Islamic preachers from abroad. The disparity between the two rivals is noticeable in the region, as the leaders of the political and economic elite in the FRELIMO party

are largely from the Makonde group, including the current Mozambican President Felipe Nyusi. As a result, the Mwani people struggle to integrate into society, rejecting the current state order and the regulatory and state redistribution system that has been in place since independence (El Ouassif–Kitenge, 2021).

In the Mozambican discourse, Cabo Delgado is known as Cabo Esquecido, or Forgotten Cape, as it is the birthplace of the FRELIMO party, the cradle of the nation, the birthplace of the independence and the birthplace of the prominent figures involved in the independence movements. However, it was the main base of the rival RENAMO in the Mozambican civil war, and since the signing of the General Peace Treaty of Rome in 1992, FRELIMO has been gradually excluding the population of Cabo Delgado economically and socially. Currently, infrastructure is poor and unemployment is high, especially among local youth, and the quality and number of social and health facilities are below the Mozambican average (Matsinhe–Valoi, 2019).

But the last decade or so has brought a new turning point in the life of Cabo Delgado. On February 18, 2010, Anadarko Mozambique, a branch of Anadarko Petroleum, discovered a huge natural gas field off the northern coast of Mozambique, which has become the most important economic project in the country's history. Some of the world's major energy companies have rushed to the coast of Cabo Delgado (Flanders Investment & Trade, 2021). Although the government of Mozambique stated in 2014 that natural resources are key to the country's economic growth, there has been little positive feedback from the local population. Despite the announcement, the discovery of gas fields in the Rovuma Basin has not led to new training or retraining programmes to integrate locals into exploitation projects. Instead, the oil companies are using skilled workers from abroad to secure their projects or, when advertising for jobs, they are applying criteria to locals that they cannot fulfil, such as fluency in English in a country where Portuguese is the state language, but Swahili is also common in Cabo Delgado. However, the coastal population is becoming increasingly disadvantaged and with the arrival of foreign companies, fishermen have been forced out of the area with disproportionate compensation, further widening the gap between the people of Cabo Delgado and the Mozambican government (Bekoe et al., 2020).

3. The crisis in Cabo Delgado until 2019

As political, ethnic and economic marginalisation gradually increased, dissatisfied radical youth increasingly identified with the messages of the radical doctrines. Rogo Mohammed was a leading figure in radical anti-state rhetoric throughout East Africa, gaining a considerable number of followers. Although he was killed in 2012, his teachings have spread through various platforms and followers to many East African countries, including Mozambique. The exact date is not known, but it is suspected that a radical religious sect was formed in the first half of the 2010s, some of whom had fled from Tanzania, demanding a purgation of Islam, as Sufi practices were seen as a new element that was unacceptable to them. In addition, hostility to the state was running rampant, as the group rejected state institutions such as schools and hospitals, refused to pay taxes, and instructed their followers not to vote in elections or not to send their children to state-run schools. The sect armed its members with firearms and began physically attacking state institutions and harassing local people. The organisation has

several names, including al-Shabaab, meaning the youth, but no relation to its Somali name relative, Ansar al-Sunna and Ahl al-Sunna wa al-Jamaa (Bukarti–Munasinghe, 2020:9). I am going to use the last abbreviation, ASWJ, in the following.

On 5 October 2017, the ASWJ attacked the police station in Mocímboa da Praia, leading to the temporary loss of police control of the city. The raid involved 30 armed rebels who killed 17 people. Among the dead were two police officers and a community leader. During the raid, the ASWJ looted weapons and ammunition and encouraged locals to refuse to pay taxes (Mapfumo, 2020). By 2019, ASWJ operations covered 9 out of 16 districts, i.e. more than half of Cabo Delgado's territory (Bukarti–Munasinghe, 2020). During the rest of 2017, the ASWJ escalated the violence mainly through night operations, with guerrilla attacks targeting small villages and the killing of local Sufi sheikhs. In 2018, it expanded its activities to include daytime attacks on isolated villages. In 2019, the number of violent attacks increased quickly and raids began to be carried out in the more populated coastal areas and on major roads (Hamming, 2021).

The government has described the combatants involved in the conflict as common criminals, saying that it is a domestic issue and that it is up to the local law enforcement forces to handle it. The government deployed first the police and then the particularly poorly trained military to prevent security in conflict zones, with little success (Nhamirre, 2021). As the escalation mounted, the government increasingly adopted a Janus-faced policy. The authorities began to restrict the activities of journalists. Absurdly high accreditation and broadcasting fees were imposed, but journalists reporting on the crisis were also arrested (Bekoe et al., 2020). Meanwhile, the government ordered the closure of three mosques suspected of being radicalisation centres, and by the end of November 2017, security forces had arbitrarily arrested more than 150 suspected extremists, a number that had risen to 300 by 2018 (Matsinhe–Valoi, 2019).

4. Escalation of the Cabo Delgado crisis from 2019

The reasons for the ASWJ's strengthening are the increase in revenues due to its geographical expansion and its affiliation to a larger network of organisations, which is none other than the Islamic State's vilayet system. The ASWJ pledged allegiance to the reigning caliph in 2018, but this was probably only accepted by the Islamic State in 2019, as the organisation officially became an ISIS affiliate in August this year (U. S. Department of State, 2021). Since 2019, ASWJ attacks have become increasingly advanced. This was due to an improvement in the quality of their weapons, as they were much better armed, as they also had machine guns, heavy machine guns, mortars, most of which were looted from government troops. They became increasingly brutal in their targeting of civilians who were part of the government's administrative system, often executing them by beheading. By 2020, the organisation had grown so strong that it was capable of simultaneous attacks, and was able to attack and, for a time, even invade major cities in the region (Lister, 2020).

The government was reluctant to call in intervention forces, so it turned to private military companies (PMCs) to mitigate the chaos in Cabo Delgado. The Wagner

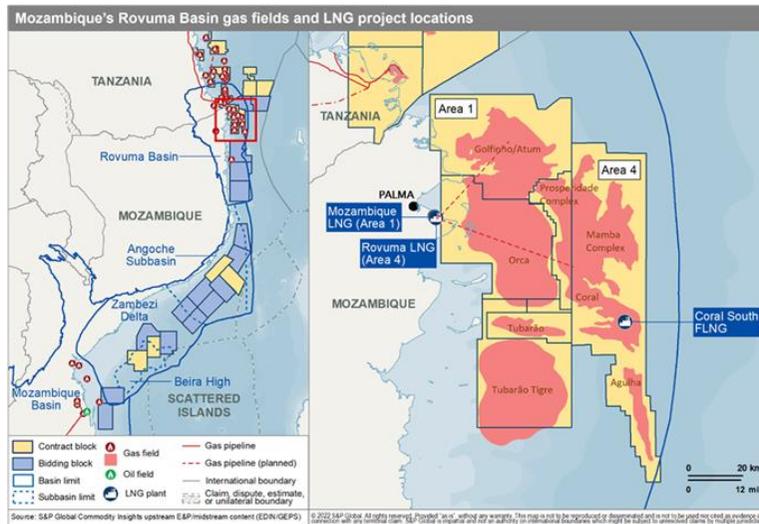
Group first appeared in September 2019, with around 200 armed men, but their losses in combat led them to withdraw from the region at the end of the year, without achieving any significant results (Sukhankin, 2020). In April 2020, the Dyck Advisory Group (DAG) soldiers landed for a year with some helicopters, helping the Mozambican army with air support. In February 2021, the Mozambican government hired a third company to supply military equipment, training and advice. This time, a consortium of South Africa-based Paramount Group and Dubai-based Burnham Global was selected (Nhamirre, 2021).

PMCs have not lived up to expectations, as evidenced by the fact that the peak of escalation was 2021. The ASWJ attacked and occupied the cities of Mocímboa da Praia and Palma, forcing sub-Saharan East African states to act. The attack on the latter was the most significant action, as the city is considered the gateway to the natural gas fields. The attack in March 2021 gave the ASWJ a huge popularity boost, but this move forced the Mozambican government to accept foreign military reinforcements. In the summer of 2021, a 1,000-strong Rwandan force arrived in Cabo Delgado, followed by the Southern African Development Community (SADC), as a SAMIM mission of around 2,000 troops from eight member states arrived in the region. These units are still located there, in larger numbers. They have forced the ASWJ to retreat and the scale and intensity of attacks has been reduced. But this does not mean the group has ended, they have restructured themselves. They broke up into smaller units and the new focus of their attacks became the western and southern parts of Cabo Delgado, and their influence spread to the neighbouring provinces of Niassa and Nampula (Columbo, 2023).

5. The natural gas project in Mozambique

Since the discovery of natural gas fields in 2010, Mozambique has been on the global map of the natural gas industry. Although there is currently regular natural gas production in the south, it is on a smaller volume and the final destination is South Africa, but the South African company Sasol is working on further developments that could make the Inhambane province in southern Mozambique even more important (International Trade Administration, 2022). In the north, the Rovuma Basin, part of Cabo Delgado, is currently undergoing huge investments. It is reported that the development of the liquefied natural gas (LNG) project will produce 30 million tonnes of natural gas per year. The LNG project, worth around \$55 billion, is reportedly the largest investment of its kind in Africa, worth four times Mozambique's GDP (Flanders Investment & Trade, 2021).

Figure 2. The map of the natural gas fields in the Rovuma Basin: the Area 1 and the Area 4



Source: Piccoli et al. (2022)

The map in Figure 2 shows the division of the region into two areas. The main partner in Mozambique's Rovuma Offshore Area 1 is the French company Total Energies, which holds a 26.5% stake. Previously, Anadarko Petroleum (now Occidental Petroleum) was the concess operator. Total bought Anadarko's 26.5% operating stake in the Rovuma LNG project for \$3.9 billion in September 2019, but there are also a number of Mozambican and foreign investors in the area. The gas fields in this area are located at a depth of 1,600 metres, about 40 kilometres off the coast of Cabo Delgado. The gas reserves in Area 1 are estimated at 2.1 trillion cubic metres (tcm). An LNG processing plant is being built on the coast, where the gas will be piped in, liquefied by the plant and contained in LNG storage tanks. Other supporting facilities for the LNG plant will include a material offloading facility and a marine terminal to receive large LNG carriers, which will be shared with the Area 4 LNG projects (NS Energy, 2019). The Cabo Delgado LNG development plan includes two 180,000 cubic metre LNG storage terminals, a condensate storage facility, a multi-port offshore terminal and associated utilities and infrastructure, bringing the two sites together. The onshore hub is located in Afungi Park, where all supporting infrastructure is located, including accommodation, port and airport infrastructure (International Trade Administration, 2022). However, the implementation of the project was affected by the ASWJ attacks. The 2021 attack on Palma was only a few kilometres from Total's planned facilities. As a result, the French company evacuated its workers reflected on vis maior situation and the project has been suspended since then. Total has conditioned its return on the restoration of peace and security and an improvement in the humanitarian situation. At the time of writing, Total had requested Jean-Christophe Rufin and his committee to assess the current circumstances in Cabo Delgado, which would make it possible to continue the project while respecting human rights. At the moment there is no result of the study, but if it is positive, Total

will return as soon as possible, but there is still no realistic chance of full LNG production coming on stream before 2028, even though the \$20 billion project was originally due to be completed by 2024 (Exarheas, 2023).

The other zone is Area 4, where the main investors are Eni and ExxonMobil, with Eni leading all upstream activities and ExxonMobil building and operating the onshore LNG facilities at the Afungi LNG Park (International Trade Administration, 2022). The Coral South Floating LNG project should be highlighted here. Eni discovered an estimated recoverable gas reserve of 0.3-0.4 tcm in the Coral field in 2012. With a water depth of 2,000 metres, the Coral South project is the first FLNG facility to be deployed in deepwater offshore Africa and is the deepest FLNG production facility in deep water worldwide. FLNG technology offers Mozambique a short-term solution for the monetization of gas against a background of security challenges, but it is still a relatively new technology with uncertainties regarding project utilization rates, maintenance and operating costs in the changing ultra-deepwater and weather conditions. However, it is currently the most stable, as the project can progress and develop unaffected by the blocking effects of the security crisis on the coast (Piccoli et al., 2022). The FLNG project has been accelerated by the arrival of a floating plant for liquefying natural gas built by Samsung Heavy Industries in Area 4 in January 2022. This plant will be capable of liquefying nearly 3.4 million tonnes of natural gas per year when fully operational (Kedem, 2022). The stability of the FLNG project is demonstrated by the fact that the first shipment arrived in Croatia on the British Mentor on 23 January 2023 and left the Krk LNG terminal two days later. This was the biggest achievement of the Coral Sul floating LNG facility so far (Natural Gas World, 2023).

Table 1. List of the prominent companies in the LNG project in Cabo Delgado

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Area 1		Area 4	
Name	Origin	Name	Origin
Total Energies	France	Eni	Italy
Saipem	Italy	British Petroleum	UK
Mitsui	Japan	GALP	Portugal
ONGC Videsh Rovuma Limited	India	ExxonMobil	USA
BPRL Ventures	Mozambique	China National Petroleum Corporation	China
Beas Rovuma Energy Mozambique	Mozambique	Kogas / Samsung Heavy Industries	South-Korea
PTTEP – PTT Exploration & Production	Thalián	Empresna Nacional de Hidrocarbonetos	Mozambique

Source: Exarheas (2023), Flanders Investment & Trade (2021) and Piccoli et al. (2022)

The question arises: how much gas is this and what does it mean internationally? It is safe to say that Mozambique has the majority of East Africa's reserves, with 2.8 tcm, which is third in Africa after Nigeria (5.4 tcm) and Algeria (4.3

tcm), and ahead of Egypt (2.4 tcm). This number is in line with other major gas producers such as Azerbaijan (2.8 tcm) and Kazakhstan (2.7 tcm). Mozambique has larger reserves than LNG exporters such as Norway (1.5 tcm), Australia (2.4 tcm) and Malaysia (0.9 tcm) (Nakhle, 2022). A másik összehasonlítási alap pedig az, hogy 2020-ban az uniós országok 155 milliárd köbméter orosz földgázt fogyasztottak, ami a teljes gázfogyasztásuk több mint egyharmadát tette ki. Another basis for comparison is that in 2020, EU countries consumed 155 billion cubic metres of Russian gas, more than a third of their total gas consumption. Mozambique accounts for 18 times the previous annual Russian consumption (Zhou et al., 2023).

6. Conclusion

The question asked in the introduction was: can Mozambique, and in particular Cabo Delgado, one of the most underdeveloped provinces, be a winner in the Russian-Ukrainian war? Or can the political leadership in Mozambique be able to take advantage of the huge amount of natural gas revenues available and strengthen the country? The answer is definitely yes, but the question is whether the Mozambican leadership can exploit this opportunity. It is clear that the Mozambican government could benefit from huge revenues in the future as the gas project gets under way.

The problem is the state redistribution system, because the country is full of contradictions. Firstly, the capital Maputo is located in the southern third of the country, so it is difficult for the government to reach the northern areas. Secondly, the FRELIMO party has deliberately tried to reduce the importance of Cabo Delgado because of its rivalry with RENAMO, which has led to a civil war and this kind of political conflict still affects the underdevelopment of the northern half of the country. Secondly, the escalating ethnic conflict in Cabo Delgado limits the full exploitation of the potential of natural gas. In my opinion, the ASWJ would remain an Islamist sect if it lacked such ethnic and, to a small extent, religious divisions. The discovery of natural resources has radicalised the masses of people by making it impossible for locals or the craftsman miners in the interior to live there or by resettling them, and the ASWJ has taken advantage of this to gain a strong local base.

The problem is worsened by the drastic decline in trust in the state in the northern regions. This is mainly due to the high level of corruption, being the 36th most corrupt country in the world (Transparency International, 2023), and the resulting ethnic marginalisation that we see in the case of the Mwani, or the opposite, ethnic favouritism that I have outlined in the case of the Makonde group. The other obvious problem is the underdeveloped condition of the army, as without the intervention force Mozambique would have been unable to de-escalate the conflict. Thus, a serious reform of the army would be necessary, which is a long-term process, while foreign forces can only provide superficial stability, which is just enough to implement the LNG project. In addition, fundamental social structural reforms are necessary, for which the first steps have been taken. The government has created the Integrated Development Agency of the North (ADIN), which provides socio-economic support to the northern provinces, including Cabo Delgado. Mozambique has also received financial support from USAID, the EU, the African Development Bank and the World Bank (Sany, 2021). But this will also be a long-term process.

Finally, the question is: how much does LNG investment reinforce the neocolonisation of Mozambique? It is difficult to give a clear answer, as this is the beginning of a long process, but there is evidence to suggest that the country could further increase its dependence. On the political side, its weak military forces mean that it relies on soldiers and trainers from neighbouring and developed countries. It is clear that Filipe Nyusi cannot fully implement his political will even within his country. Economically, there are two signs of this process. The most obvious is the emergence of multinational companies with multi-billion dollar LNG projects and cutting-edge extraction technologies, which Mozambique alone would be incapable of. On the other hand, the population does not directly benefit from the LNG project, with the result that the local political and economic elite gain the most, widening the social divide in economic and therefore political terms. Although the Russia-Ukraine war makes Mozambique an attractive partner with the world's growing hunger for natural gas, it also increases the dependency and neo-colonialist tendencies in the region as a side effect of globalisation and capitalism, based on current trends.

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