



AFRICAN NARRATIVES

Mozambique's Cabo Delgado Insurgency: Analyzing the Interplay of Security, Governance, and Energy



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Executive Summary

This paper examines the evolving armed violence in Mozambique's northern Cabo Delgado Province, a region of profound strategic significance defined by the intersection of three critical dimensions: a persistent insurgency affiliated with the Islamic State, a deepening humanitarian crisis, and the disruption of globally significant liquefied natural gas (LNG) projects. Since 2017, the province has devolved into a chronic conflict zone, resulting in thousands of civilian fatalities and the displacement of hundreds of thousands. These instabilities have exposed major energy investments—most notably TotalEnergies' project in Afungi—to unprecedented operational risks. The analysis is structured into four primary sections. The first provides a historical overview of the insurgency's evolution from a local protest

movement into an organized extremist entity. The second details the current operational landscape, documenting specific attacks in September 2025 and investigating allegations of human rights abuses by government forces. The third section offers a multidimensional analysis of the crisis through security, social, political, and economic lenses. Finally, the paper outlines three potential future scenarios: the persistence of the status quo, a military escalation, or a development-led de-escalation. The assessment concludes that Cabo Delgado is not merely a localized challenge but a pivotal regional and international issue that tests the viability of the "security-development nexus" in Sub-Saharan Africa.

I. Introduction

Cabo Delgado Province in northern Mozambique constitutes one of the most complex hotspots in Sub-Saharan Africa, where security, humanitarian, and economic considerations intersect in a strategic manner. Since 2017, the province has transformed into a theater of armed insurgency led by local groups that later declared allegiance to the Islamic State, plunging the country into a cycle of violence.

Cabo Delgado Province stands as one of the most volatile and complex flashpoints in Sub-Saharan Africa. Since 2017, the region has been besieged by an insurgency led by local militants who eventually pledged allegiance to the Islamic

State, sparking a cycle of violence that has claimed thousands of lives and triggered a massive internal displacement crisis. The conflict is further complicated by the presence of vast natural gas reserves; the suspension of TotalEnergies' multi-billion-dollar LNG investments since 2021 highlights the direct threat the insurgency poses to national and international economic interests. This convergence of energy security, radical militancy, and international intervention makes Cabo Delgado a critical litmus test for the Mozambican state's ability to balance military imperatives with developmental needs and political legitimacy.

I. Historical and Contextual Background

The insurgency in Cabo Delgado has undergone a significant transformation since its inception in 2017. What began as a localized movement rooted in socio-economic grievances has evolved into a sophisticated armed entity with formal ties to the Islamic State (IS). This shift in affiliation has been accompanied by a marked increase in the scale and brutality of operations, fundamentally altering the region's security architecture.

The humanitarian toll of this evolution has been catastrophic. International monitoring agencies estimate that several thousand people have been killed and hundreds of thousands displaced. Data from United Nations agencies and humanitarian organizations confirm that the number of internally displaced persons has surpassed several hundred thousand, while specialized reports point to thousands of cumulative deaths since 2017.

The province's strategic importance escalated sharply following the discovery of offshore gas reserves, yet the very resources intended to transform Mozambique's economy have become targets. The 2021 attack on the town of Palma was a turning point, forcing TotalEnergies to declare force majeure and withdraw its workforce from the Afungi site, thereby stalling one of the continent's largest investment projects.

In response to the deteriorating situation, regional actors intervened in 2021. This included the deployment of Rwandan combat forces and the Southern African Development Community Mission in Mozambique (SAMIM). While these interventions achieved notable tactical gains and restored a semblance of state authority in certain districts, they have yet to neutralize the insurgent threat entirely or prevent recurring attacks in key urban centers.

1 Morier-Genoud, Eric, et al. "Actor Profile: Islamic State Mozambique (ISM)." ACLED — Clarity in Crisis, 30 Oct. 2023, Actor Profile: Islamic State Mozambique (ISM) | ACLED

2 OCHA. Mozambique. United Nations Office for the Coordination of Humanitarian Affairs, 2025, <https://www.unocha.org/mozambique>

3 International Organization for Migration. Mozambique Crisis Response Plan 2024. IOM Crisis Response Portal, 2024, <https://crisisresponse.iom.int/response/mozambique-crisis-response-plan-2024>

4 TotalEnergies. Mozambique LNG: TotalEnergies' Response. Press Release, 11 Oct. 2023, TotalEnergies, https://www.totalenergies.com/system/files/documents/2023-10/EN_Mozambique_LNG_TotalEnergies_response.pdf

5 Government of Rwanda, "Rwanda Deploys Joint Force to Mozambique." Ministry of Defence, 2024, <https://www.mod.gov.rw/news-detail/rwanda-deploys-joint-force-to-mozambique-1>

6 Amani Africa. "Ministerial Meeting on the Situation in Mozambique and Operations of SAMIM." Amani Africa, 7 Nov. 2022, https://amaniafrica-et.org/ministerial-meeting-on-the-situation-in-mozambique-and-operations-of-samim/?print=print&utm_source=chatgpt.com

7 Armed Conflict Location & Event Data (ACLED). Cabo Ligado Update: 5-18 May 2025. ACLED, 21 May 2025, https://acleddata.com/update/cabo-ligado-update-5-18-may-2025?utm_source=chatgpt.com.

II. Current Field Realities

Recent developments indicate that the crisis is neither stagnant nor resolved. An escalation in the frequency and diversity of armed attacks, coupled with allegations of misconduct by state security forces, underscores the volatility of the current landscape.

Escalation of Armed Operations

In early September 2025, a series of targeted strikes illustrated the insurgents' continued reach:

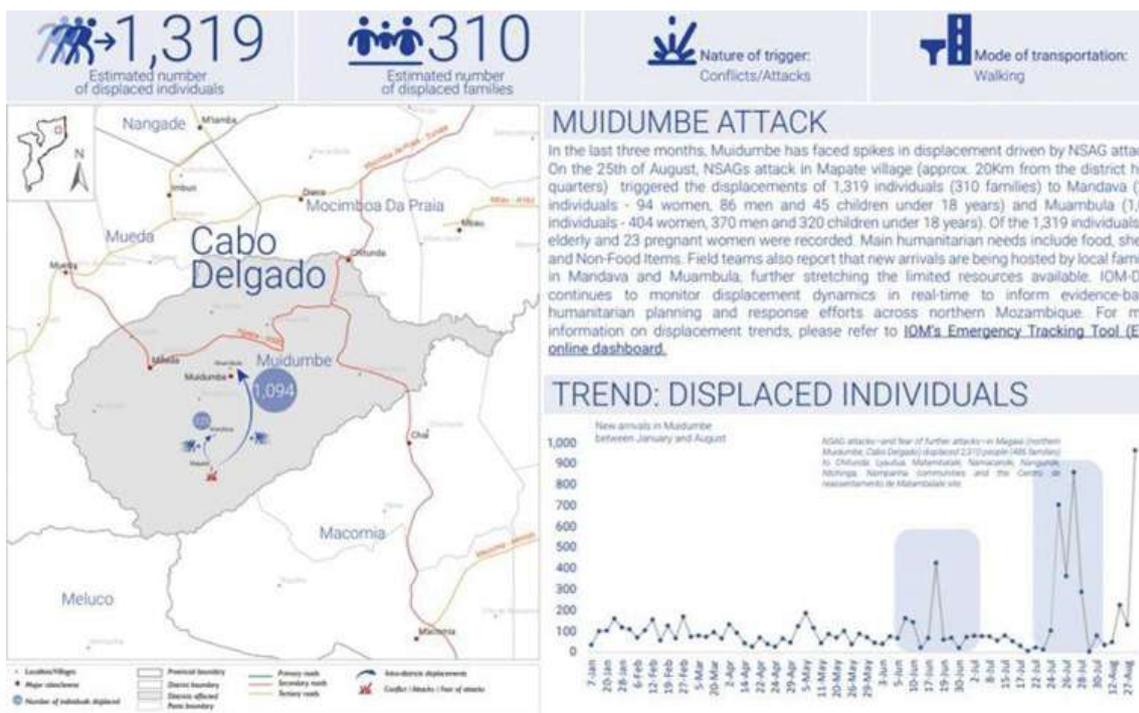
• Mocimboa da Praia (September 7, 2025):

Insurgents attacked this strategic coastal city, located just 80 kilometers south of the TotalEn-

gies LNG site. Reports indicate that militants targeted specific individuals in their homes, resulting in several deaths, including police officers. The brutality of the attack, which included reports of beheadings, highlights the ongoing challenge of securing key logistical hubs.

• Muidumbe (September 6, 2025):

An attack in the Muidumbe area left at least six civilians dead and led to the widespread looting of agricultural harvests. This incident exacerbated an existing displacement crisis, as over 1,300 people fled the area, following a previous surge in violence in late August.



The Rapid Needs Assessment issued through the international relief network ReliefWeb indicated a wave of escalation and recurrent attacks in the districts of Muidumbe and Macomia between late August and early September 2025. It is note-

thy that by the end of July, terrorist group attacks in southern Cabo Delgado had already displaced more than 57,000 people in Quirimbas District.

8 "AllAfrica. Mozambique: Cabo Delgado War Intensifies. 10 Sept. 2025, AllAfrica, https://allafrica.com/stories/202509110278.html?utm_source=chatgpt.com

9 The Defense Post. "Jihadists' Deadly Attack in Mozambique." The Defense Post, 9 Sept. 2025, <https://thedefensepost.com/2025/09/09/jihadists-deadly-attack-mozambique/>

10 "Cabo Delgado: Terrorist Attacks Have Displaced Over 1,300 People Since Late August." 360Mozambique, Sept. 2025, <https://360mozambique.com/development/cabo-delgado-terrorist-attacks-have-displaced-over-1300-people-since-late-august/>

11 "Mozambique — Rapid Needs Assessment (RNA), Muambula and 24 de Março — Muidumbe District, Cabo Delgado (4–10 September 2025)." ReliefWeb / Rapid Response Mechanism, Sept. 2025, <https://reliefweb.int/report/mozambique/rapid-needs-assessment-rna-rapid-response-mechanism-rrm-muambula-and-24-de-marco-muidumbe-district-cabo-delgado-mozambique-4-10-september-2025-enpt>.

12 "Mozambique: Over 1300 displaced by August 25 attack in Muidumbe." Club of Mozambique, Aug.–Sept. 2025, <https://clubof-mozambique.com/news/mozambique-over-1300-displaced-by-august-25-attack-in-muidumbe-291324/>.

Alleged Violations by Government Forces

The security situation is further clouded by reports of abuses committed by the Mozambican Armed Forces (FADM). On September 8, 2025, ACLED reported the killing of sixteen fishermen near Rolas Island by government troops during an anti-insurgent sweep. This incident follows a pattern of maritime targeting; in August 2025, five individuals were reportedly killed when naval forces opened fire on civilian vessels suspected of insurgent links. Such incidents complicate the state's efforts to win "hearts and minds" and fuel local resentment.

III. Multidimensional Analysis

To fully grasp the Cabo Delgado crisis, one must analyze it through four intersecting lenses:

1. Security: The persistence of insurgent activity despite the presence of regional military coalitions suggests a high degree of tactical adaptability by the armed groups. It also points to critical gaps in intelligence sharing and coordination between the FADM and its international partners.

2. Social: By targeting the primary livelihoods of the region—farming and fishing—insurgents are systematically dismantling the socio-economic resilience of rural communities. This strategy ensures a steady stream of displacement and

13 BSS/AFP. "Mozambique Forces Killed 16 Fishermen: Conflict Monitor." BSS News, 10 Sept. 2025, <https://www.bssnews.net/international/310531>.

14 "TotalEnergies Postpones Multi-Billion Mozambique LNG Project." Euronews, 22 Jan. 2025, <https://www.euronews.com/business/2025/01/22/totalenergies-postpones-multi-billion-mozambique-lng-project>.

Security of Strategic Installations

The \$20 billion Mozambique LNG project remains the economic centerpiece of the region, yet its future is inextricably linked to the security environment. Although TotalEnergies initially aimed to resume operations by late 2024, persistent unrest and the closure of vital logistical corridors have caused ongoing delays.

The continued deployment of Rwandan forces remains essential to protecting the Afungi perimeter.

However, the vulnerability of the supporting infrastructure, such as the port of Mocímboa da Praia, remains a primary concern for international investors.

deepens the humanitarian dependency of the population.

3. Political: Allegations of state-led violence against civilians undermine the government's domestic legitimacy. This creates a "legitimacy vacuum" that armed groups exploit to validate their narrative and expand their recruitment base among marginalized youth.

4. Economic: The proximity of the conflict to the Afungi gas facilities creates a climate of persistent risk. The continued suspension of these projects deprives the Mozambican state of essential revenue, threatening long-term macroeconomic stability.

15 "Area 1: Return of TotalEnergies Project Raises Expectations for Mocímboa da Praia Port." 360 Mozambique, 2025, <https://360mozambique.com/oil-gas/area-1-return-of-totalenergies-project-raises-expectations-for-mocimboa-da-praia-port/>

IV. Potential Future Scenarios

The trajectory of the Cabo Delgado conflict will likely follow one of three paths:

- **Scenario 1**

The Status Quo: Intermittent violence continues without a decisive military victory. In this "war of attrition," insurgents maintain their ability to disrupt infrastructure and displace populations, while LNG projects remain stalled or operate under extreme duress.

- **Scenario 2**

Security Escalation: The government and its allies launch a large-scale offensive to clear the province. While this might achieve temporary territo-

rial control, an overly militarized approach—especially if accompanied by civilian abuses—risks further alienating the local population and fueling a long-term insurgency.

- **Scenario 3**

Relative De-escalation (Comprehensive Approach): This scenario involves a shift toward a holistic strategy that integrates military security with transparent governance and economic development. By addressing the root causes of marginalization and ensuring accountability for human rights violations, the state could gradually rebuild trust and create the stability necessary for the resumption of major energy investments.





Conclusion

The crisis in Cabo Delgado is a multidimensional challenge that bridges local grievances and global strategic interests. It is a conflict where energy security, transnational extremism, and state legitimacy are deeply intertwined. While military intervention has provided a necessary bulwark against insurgent expansion, it is not a sufficient solution on its own. A sustainable resolution will require the Mozambican government to transcend a narrow security focus, adopting instead a framework that prioritizes institutional reform, human rights, and inclusive development. The future of Cabo Delgado will ultimately determine not only the success of Mozambique's energy ambitions but also the broader stability of the Southern African region.