

Situation Report: Cabo Delgado Conflict & LNG Project Status – June 2025

GSC Assessment

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USPA NEWS - BLUF(Bottom Line Up Front)*

Northern Mozambique—particularly Cabo Delgado—remains highly unstable due to escalating insurgent activity extending into new districts. While TotalEnergies prepares to restart its multi-billion-dollar LNG project with fortified security, local populations continue to face violence, displacement, and humanitarian hardship. Insurgents linked to Islamic State maintain operational mobility, threatening both civilians and economic infrastructure, including conservation zones and agricultural livelihoods.

Key Points*

Spread of Violence: Insurgent operations by Islamic State-linked militants have intensified across Cabo Delgado, reaching districts like Macomia, Ancuabe, Meluco, and Muidumbe, and increasingly pushing southward toward historically safer areas (Cabo Ligado, 2025a; Cabo Ligado, 2025b).

Tactics & Impact: These groups have employed ambushes, roadside IEDs, arson attacks on villages, and looting of artisanal gold mines. Their methods indicate a decentralized guerrilla-style approach, designed to maximize psychological and economic disruption (Cabo Ligado, 2025c).

Civilian Displacement & Fear: Over 139,000 people are internally displaced across 107 localities, primarily fleeing violence in the north (IOM, 2025). Farmers in Muidumbe and Litapata have abandoned their fields, fearing attacks—a sign of worsening food insecurity (Observador, 2025).

Security Gains & Setbacks: Mozambican forces ambushed and killed at least 12 IS-Mozambique fighters in Niassa in June 2025, showcasing tactical capability. However, insurgents continue retaliatory operations, with frequent abductions and harassment of local communities (Cabo Ligado, 2025b).

LNG Project Resumption:

*TotalEnergies plans to lift the force majeure and resume operations at the \$20 billion Afungi LNG site, supported by improved security and a \$4.7 billion loan from the U.S. Ex-Im Bank (Financial Times, 2025).

*The company has introduced sweeping new security protocols: complete land-access lockdown, enhanced perimeter surveillance, and revised vetting of contractors and supply chains (Africa Intelligence, 2025).

Human Rights & Donor Risk: UK authorities are investigating alleged human rights abuses by Mozambican troops involved in LNG site protection, potentially jeopardizing British and Dutch funding for the project (Integrity Magazine, 2025).

Conservation Disruption: In a separate but related development, insurgents raided the Niassa Reserve, killing multiple conservation scouts and civilians, and forcing the evacuation of over 2,000 people. Conservation and ecotourism activities were suspended indefinitely (The Guardian, 2025).

Analysis*

Operational Dynamics

The insurgency has evolved tactically from territorial control to highly mobile, dispersed operations aimed at overwhelming security forces and civilians alike. Their growing presence in southern Cabo Delgado suggests strategic intent to destabilize economic hubs and humanitarian corridors.

Humanitarian Pressure

The continuing displacement of civilians and abandonment of agricultural lands are compounding the crisis. The IOM's April 2025 assessment confirms displacement has shifted southward, with key agricultural zones now largely vacated by farming communities (IOM, 2025). This dynamic could escalate into a full-scale food crisis if humanitarian access remains limited.

Security-Economy Nexus

Although Mozambican and Rwandan forces have reported recent battlefield successes, such as the ambush in Niassa, they lack the sustainable logistical support to prevent insurgents from regrouping and relocating. TotalEnergies' LNG operations represent a high-stakes gamble: while fortified security may protect assets, it simultaneously risks becoming a flashpoint for further militant attention.

Reputational & Funding Risks

The UK and Dutch inquiries into rights abuses tied to military protection of LNG operations could delay further funding or lead to international scrutiny. If the allegations gain traction, TotalEnergies and its partners could face pressure to adjust their operating framework or risk reputational damage.

Ecological & Regional Spillover

The attack on Niassa Reserve is not only a tragic loss for conservation but also a signal that the insurgency is expanding beyond Cabo Delgado. Such developments increase operational costs for humanitarian and conservation missions and open a new front in Mozambique's stability challenge.

NGO Operational Risk Assessment (June 2025)*

1. Physical Security

-Rating: High

-Trend: Increasing

Notes: Expanding attack zone near NGO corridors; heightened threat to staff and facilities in Muidumbe, Macomia, and surrounding districts.

2. Displacement Pressure

-Rating: Severe

-Trend: Stable

Notes: Over 139,000 internally displaced persons (IDPs); growing demand for shelter, food, and medical support.

3. Reputational Risk

- Rating: Moderate

- Trend: Rising

Notes: Increased exposure to reputational damage due to association with security forces under human rights scrutiny.

4. Mobility Access

- Rating: High

- Trend: Unstable

Notes: Road networks to Macomia and Meluco remain vulnerable to ambushes and IEDs; transport planning requires dynamic rerouting protocols.

5. Supply Chain Disruption

- Rating: Moderate

- Trend: Increasing

Notes: Local markets and NGO supply warehouses have been targeted by insurgents for looting and resource denial tactics.

Recommendations*

1. Strategic Containment: Bolster mobile force units with air surveillance and local intelligence networks to monitor and contain insurgent spread into southern and central districts.
2. Humanitarian Coordination: Scale up agricultural and emergency food aid in displaced zones, while facilitating safe returns through community-based security arrangements.
3. LNG Engagement Protocols: Engage independent third-party monitors to oversee military conduct around LNG operations, maintaining donor trust and compliance with international norms.
4. Donor Risk Mitigation: Proactively engage with UK and Dutch funders to address concerns, potentially establishing a joint oversight mechanism to avoid loss of financing.
5. Ecological Stability Measures: Integrate conservation assets into Mozambique's national security planning to prevent further insurgent exploitation of remote and under protected reserves.

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