

Med-Or Monthly Africa Report

December 2025



Med-Or Monthly Africa Report

December 2025



Editor's Note

The past few weeks have been unusually intense for Africa, and for our work on the continent. From Luanda to Johannesburg, and well beyond official communiqués, a more substantive shift is underway. Europe and Africa are quietly but decisively rethinking their dependencies. Europe is looking beyond an increasingly unreliable United States, while Africa is doing the same with China. This mutual recalibration is the real story behind the recent EU-Africa summit in Angola, attended by twelve European and twenty-two African heads of state.

President Trump's theatrics at the G20 in South Africa, along with his inflammatory rhetoric on Nigeria and Somalis, were largely political noise aimed at a domestic audience. They deserve neither surprise nor overreaction. What matters more is what happens behind the scenes, and there the picture is more complex and more consequential. The United States remains deeply engaged in Africa, not only through its efforts to reconfigure critical mineral supply chains away from China, an opportunity Europe could benefit from if its industry is prepared to act, but also through direct, high-level involvement in peace and security dossiers.

In the space of a single month, President Trump personally intervened on Sudan and Eastern Congo, hosted Saudi Crown Prince Mohammed bin Salman with a renewed focus on Red Sea and Horn of Africa dynamics, and facilitated a Rwanda-DRC agreement aimed at stabilising Eastern Congo while expanding US access to strategic minerals. None of this will resolve entrenched conflicts overnight. Violence persists and is likely to intensify. Still, it signals sustained American attention to some of Africa's most acute crises.

This edition also examines the coup in Guinea-Bissau. As Giuseppe Mistretta rightly observes, a near-continuous belt of authoritarian regimes now stretches from the Atlantic to the Red Sea, openly challenging the African Union's own governance principles. Yet investment continues to flow into Africa, not in spite of these risks, but alongside genuine commercial opportunities. This is why our thematic focus turns to Africa's growing role in bilateral investment treaties and evolving arbitration practices, with valuable contributions from Hussein Haeri and Camilla Gambarini of Withers.

These weeks also marked an important milestone for Med-Or. We have formally registered the Med-Or Italian Foundation for Africa in Kenya, creating a continental hub that I have the honour to lead. This will allow us to expand partnerships by working with Africa and in Africa. We hosted a high-level Zambian delegation for strategic discussions and launched CyberBridge in Rome, a cyber training programme involving eleven African countries, developed in partnership with Italy's Agency for Cybersecurity and supported by the Ministry of Foreign Affairs. The strong response we continue to receive across the continent, and the presence of senior cyber representatives from Ethiopia, Kenya and Zambia at the launch, confirm that this is precisely where engagement must be heading.

Africa is no longer waiting for permission. Those who fail to adapt, politically, economically and strategically, will simply be left behind.

Umberto Tavalato

South Africa Hosts the G20

Adi Guyo



The hosting of the 2025 summit in an African country marked a significant milestone in the gradual expansion of African inclusivity within multilateral governance. For decades, South Africa remained the continent's sole G20 founding member, representing African interests despite the continent comprising 55 African Union (AU) member states. The AU's admission as a permanent member in 2023 further advanced this trajectory, creating space for Africa to participate more directly in agenda-setting within a forum that shapes global economic priorities. While structural asymmetries persist, this shift signals a move away from Africa as a passive policy receiver towards a more active participant in global governance.

However, this milestone was overshadowed by the United States (U.S.) boycott, bringing to light underlying strains in global governance and exposing the vulnerability of G20 consensus. Following the conclusion of the summit President Trump threatened to exclude South Africa from the next G20 summit in Miami. This, however, would be a misrepresentation of G20 structure as member states do not require invitations, and instead attendance is inherent to membership, of which South Africa was a founding state.

The only way to bar South Africa from attendance would be a visa denial to its delegation – an escalatory step that would set a dangerous precedent as it would weaponize host country privileges, introduce new forms of coercive powers into global governance and risk triggering reciprocal conduct by future hosts.

Such politicisation would be detrimental as G20 is among the largest economic coordinating forum, accounting for roughly 85% of the global GDP, 75% of global trade and more than half of the world's population. Its value lies not only in its economic weight but also in its soft power to influence and ability to set global agendas. G20 decisions are not binding and rely on consensus and political goodwill for implementation. As such, any action that encourages fragmentation will have a direct impact on the forum's effectiveness.

The present rift carries several risks including the creation of precedent for future boycotts and exclusionary tactics, a reduced capacity for implementing commitments heavily dependent on U.S. support, fuels bloc-based polarisation and erodes multilateral norms at a time when global cooperation is already under strain. Excessive politicisation would weaken G20 cohesion and diminish the forum's broader contribution to global governance.

Overall, the summit in Johannesburg demonstrated both resilience and the vulnerability of global governance. South Africa effectively advanced Africa's agenda, but the U.S. boycott exposed how easily G20 unity can be disrupted. Looking ahead, the central challenge for the G20 is whether it can preserve meaningful cooperation in an increasingly polarised international environment marked by unilateralism and transactional politics.

EU-Africa Summit Key Takeaways

Corrado Čok



On November 24-25, the leaders of the African Union and the European Union met in Luanda to build new momentum around Africa-Europe relations. More than previous editions, the 7th AU-EU Summit was marked by a cordial and collaborative atmosphere that spearheaded a shared commitment to multilateralism. The remarkable level of participation - featuring 12 European and 22 African heads of state or government, along EU leaders and UN Secretary-General Antonio Guterres - confirmed that both sides of the Mediterranean see this partnership as a priority. Over 1/3 of the world's nations and 1/4 of its population was represented at the table.

The Summit did not happen in a vacuum. Just few days before, President Donald Trump had snubbed the G20 in South Africa and barred President Ramaphosa from the next edition in Miami. For African and European leaders, the event confirmed the growing unpredictability of the relationship with Washington. The G20 and the AU-EU Summit hence became a momentous time of political reckoning. They revealed the overall alignment of two continents as they navigate an increasingly unruly and unpredictable international system sitting on the backseat. The consequence is that Africa and Europe share the need to diversify their international partnerships against overreliance on the U.S. and China, now fuelling their political alignment.

Multiple areas of convergence emerged at the AU-EU Summit. Chiefly, African and European leaders confirmed their commitment to multilateralism but agreed on requests to increase Africa's representation in both governance and financial structures, chiefly the UN Security Council, WTO, IMF and WB. On peace and security, the parties agreed on upholding international law in conflicts and called on an immediate ceasefire and an Africa-led solution to the conflict in Sudan. On the economic front, AU and EU leaders highlighted the importance of trade in fostering sustainable development, especially along infrastructural routes like the Lobito Corridor, and pledged to support key value chains, such as agriculture and pharmaceutical.

African partners also praised the EU for its support to security initiative, such as the AU-led missions to Somalia, and acknowledged the transformative action of Global Gateway projects on the continent, despite their complex implementation processes. Contentious issues - see reparations - were not addressed confrontationally by African leaders, unlike other occasions, testifying once again a genuinely positive attitude from both sides. Overall, the Summit laid the foundation for long term engagement and gave a powerful political endorsement to it.

The AU-EU Summit did not usher in sensational announcements, nor its outcomes are truly quantifiable. Cooperation initiatives now need to be translated from policy papers into reality or momentum will be lost. The EU increasingly couples continent-wide programmes with bilateral, long-term partnerships to fast-track delivery. African countries will need to progress on issues like revenue mobilisation and debt management to create suitable conditions. Implementation will be the decisive factor shaping the future of Africa-Europe relations.

Trump's Diplomacy in Eastern Congo

Corrado Čok



On 4 December, President Donald Trump hosted President Félix Tshisekedi of the Democratic Republic of Congo (DRC) and President Paul Kagame of Rwanda to sign the Washington Accords, a deal intended to pacify Eastern Congo and secure greater access for US companies to Congolese minerals. Yet the mood in Washington told a different story: Tshisekedi and Kagame avoided any handshake or exchange, signalling limited buy-in from both sides. At the same time, on the battlefield, the Rwanda-backed M23 Movement launched a major offensive, seizing Uvira - a strategic town on Lake Tanganyika and the Burundian border. Rather than ending the conflict, this development risks expanding it across the wider Great Lakes region.

The conflict in Eastern Congo - one of Africa's oldest and the world's deadliest since the Second World War - saw a major escalation in January 2025, when M23 captured Goma, the largest city in the mineral-rich East. At the time, Washington was attempting to reassert its presence in the DRC and wrest part of its mineral supply chains from China. In exchange for mining contracts, President Tshisekedi demanded US support against Rwanda and the M23, laying the groundwork for Washington's mediation.

Building on earlier agreements, the Washington Accords combine security measures aimed at de-escalating tensions between the DRC and Rwanda with provisions for economic integration designed to facilitate US investment in the mining sector. Although some US mineral deals have since materialised, implementation has been slow, and negotiations between Kinshasa and M23 have made little progress despite several preliminary understandings. The latest M23 advance - supported by Rwandan troops on the ground - now effectively nullifies the Accords. Observing Washington's approach to the Russia-Ukraine negotiations, President Kagame likely calculated that the US was unwilling to jeopardise its own diplomatic initiative by confronting a party holding a clear military advantage. Rwanda has received criticism from the US at the UN Security Council, but no tangible consequences.

Beyond Kigali's short-term calculations, the conflict in Eastern DRC reflects a complex web of competing interests. Rwanda is unwilling to abandon M23, a key demand of the Washington Accords, because the group contributes to its security and enables access to Congolese minerals. Yet M23 is not simply a Rwandan proxy: it seeks to entrench local authority and gain representation in national institutions, ambitions that Kinshasa strongly opposes. Meanwhile, the DRC has depended on Wazalendo, a loosely organised coalition of anti-M23 ethnic militias. Although the government supports them, it does not fully control their actions, and they are unlikely to stop fighting regardless of any formal agreement.

Turning "war minerals" into "peace minerals" is therefore no simple task in a region with multiple armed actors and overlapping agendas. Many interconnected issues remain unresolved, and as the familiar adage in peace negotiations reminds us, "nothing is agreed until everything is agreed."

The US in the Horn of Africa

Luciano Pollichieni



President Trump's second-term posture differs markedly across Somalia, Sudan, and Ethiopia. While these approaches do not yet constitute a unified regional strategy, several consistent trends are evident. The Horn of Africa is increasingly influenced by the involvement of Gulf states, and U.S. policy appears progressively influenced by their perspectives.

Saudi Arabia currently appears to hold particular sway in Washington. Riyadh's priorities in the Red Sea and Horn of Africa include support for a Sudan process centred on the Sudanese Armed Forces (SAF), as well as close engagement with Eritrea and other Red Sea littoral states. The United Arab Emirates, by contrast, pursues a different approach, driven in part by concerns over a potential resurgence of Islamist actors in Sudan. Abu Dhabi has been accused of backing the Rapid Support Forces (RSF), allegations it has denied. U.S. unease with aspects of this posture has been voiced by Secretary of State Marco Rubio, although without explicitly naming the UAE.

In Sudan, U.S. policy combines diplomatic engagement—particularly through coordination with Egypt, Saudi Arabia and the UAE—and the use of targeted sanctions to limit the conflict's escalation. However, expectations that external pressure alone can push rival factions toward a lasting settlement underestimate the resilience of Sudan's war economy and the regional patronage networks sustaining both sides.

In Ethiopia, Washington has repeatedly warned both the federal government and Tigrayan authorities against a renewed conflict in Tigray. At a moment when President Trump is keen to present himself as a broker of peace agreements, the prospect of a new large-scale confrontation, particularly a conflict between Ethiopia and Eritrea over access to the sea, would be deeply undesirable. The United States has therefore consistently called for de-escalation. Eritrea has sought closer engagement with Washington, supported by its ties with Saudi Arabia, as reflected in President Isaias Afwerki's recent official visit to Riyadh. While the US remains open to engagement with Eritrea, which holds 1,200 kilometers of strategic Red Sea coast, it is also careful to preserve its strategic interests with Ethiopia, the region's larger and more influential state.

In Somalia, U.S. engagement continues to be primarily framed through a counterterrorism perspective. Combating al-Shabaab remains the central priority, pursued through air strikes, intelligence cooperation, and support to Somali security forces. This security-focused approach also informs U.S. relations with Somalia's federal member states, including support for Puntland's operations against the local Islamic State affiliate.

Taken together, these dynamics reveal a U.S. strategy that relies heavily on diplomatic coordination and security-driven instruments to promote stability. However, these tools alone have so far proven insufficient to address the deeper structural drivers of conflict, which continue to intensify across the region.

Trump's Treat of Intervention in Nigeria to Protect Christians

Giuseppe Mistretta



In recent weeks, President Donald Trump has threatened Nigeria with the possibility of a US military intervention if the government in Abuja fails to guarantee adequate protection for its Christian population. Responding to pressure from religious conservatives in the United States, Trump claimed that too many Christians are being killed in Nigeria, describing the situation as a form of “persecution”.

Nigeria's President, Bola Ahmed Tinubu, a veteran politician educated in Chicago and long regarded as a reliable Western partner, firmly rejected this framing. He emphasised that Nigeria is, under its Constitution, a multi-confessional federal state in which no religious community is subject to institutional discrimination. Tinubu nonetheless acknowledged that Nigeria continues to suffer from extremely high levels of violence, resulting from terrorism, ethnic clashes, criminal networks, poverty and competition over resources. These dynamics, he noted, affect both Christians and Muslims alike. While expressing willingness to explain Nigeria's complex socio-economic realities directly to President Trump, Tinubu categorically rejected any form of “religious profiling” in Africa's most populous country, home to roughly 230 million people.

Data from the Observatory for Religious Freedom in Africa (ORFA) supports this assessment. Between 2019 and 2023, approximately 31,000 civilians were killed in Nigeria in ethnic violence or criminal conflict. Of these, around 16,500 were Christians and 6,200 Muslims. However, only a small fraction of these deaths can be attributed directly to religious motivations, rather than to broader security, criminal or socio-economic drivers.

This distinction is particularly important in relation to mass kidnappings, including those targeting students. Such abductions, often associated with Boko Haram, are typically motivated by ransom payments or the desire for international publicity, rather than by religious ideology alone. In parallel, severe poverty in drought-affected areas has intensified local and regional conflicts over scarce resources, further fuelling violence.

Rather than military force, Washington would have far greater leverage through economic measures. Bilateral trade between the United States and Nigeria stands at around USD 10 billion. While this figure is marginal for the US economy, which primarily imports Nigerian oil and gas, it is highly significant for Nigeria. This vulnerability has been further exposed by the failure of the US Congress to renew the African Growth and Opportunity Act (AGOA) in September, removing a key trade preference for African exporters.

Any US military action against Nigeria would carry substantial risks. Beyond the country's sheer size, Nigeria continues to exert considerable influence within West Africa, even after relinquishing the rotating presidency of ECOWAS. President Tinubu has consistently aligned Nigeria with Western positions in the renewed geopolitical competition across Africa. Moreover, the Nigerian armed forces remain a critical barrier against regional terrorism, confronting threats from Boko Haram, JNIM and ISGS.

A US military strike launched without a clear and coherent strategic framework would likely deepen instability across West Africa and the Sahel, to the benefit of terrorist organisations and external competitors, including Russia and China. Recognising the need to signal resolve, President Tinubu moved in early December to replace Defence Minister Mohammed Abubakar with General Christopher Musa, a decision widely interpreted as an effort to respond to US criticism and strengthen Nigeria's counter-terrorism posture.

Coup d'État in Guinea-Bissau

Giuseppe Mistretta



On 26 November, a new military coup took place in Guinea-Bissau. President Umaro Sissoco Embaló, who had been in office since 2020, was removed by the armed forces, which justified their intervention as necessary for the “restoration of national security and public order”. The head of the new transitional government is General Horta N'Tam, former Chief of Staff of the Army and a figure traditionally close to the ousted president.

The putsch occurred immediately after presidential elections, in which the two main candidates, the incumbent Embaló and his challenger Dias da Costa, were running neck and neck during the vote count. This timing has fuelled widespread speculation that Embaló, anticipating a likely defeat, may have been personally involved in orchestrating the coup in order to prevent his opponent's victory. Embaló has denied any involvement in the events. Following the takeover, he fled first to Senegal and the Republic of Congo and is reportedly seeking final asylum in Morocco.

With the coup in Guinea-Bissau, military regimes in West Africa and the Sahel now form a near-continuous belt stretching from the Atlantic Ocean to the Red Sea. This arc includes Guinea, Mali, Burkina Faso, Niger, Chad and Sudan, despite the latter's ongoing civil war. In many of these countries, transitional military authorities have pursued closer cooperation with Russia while simultaneously dismantling long-standing security partnerships with France, including the closure of major French military bases.

Guinea-Bissau has long been considered one of Africa's main entry points for drug trafficking, with well-established links to South American cartels. The country has also been plagued by widespread corruption at both national and local levels, further weakening state institutions and civilian governance.

The new military junta has announced its intention to remain in power for one year, after which new elections are expected to be held. In line with their internal rules, both ECOWAS and the African Union suspended Guinea-Bissau's membership immediately following the coup.

New Dimensions for Arbitration in Africa

Hussein Haeri & Camilla Gambarini



Africa is increasingly - and rightly - gaining recognition as one of the world's most dynamic investment destinations. While natural resources have not always translated into broad-based development - sometimes even fuelling the “resource curse” or the “paradox of plenty” - the continent's potential remains vast. What is less often acknowledged is the parallel opportunity presented by Africa's rapidly growing consumer markets, its expanding intra-continental trade and investment networks, and the rising importance of renewable energy and environmental considerations. With these opportunities comes the critical need to ensure that investment disputes are resolved in ways that encourage, rather than deter, investment and support the rule of law at national, continental and international levels.

Bilateral Investment Treaties (BITs), concluded between states to promote and protect cross-border investment, typically include standards such as fair and equitable treatment and non-discrimination. Crucially, they also often grant qualifying foreign investors the right to access independent international arbitration in disputes with host states. African countries today have more than 500 BITs in force.

International arbitration remains one of the principal mechanisms available to foreign investors to mitigate political risk, including nationalisations, indirect expropriation, and discriminatory measures. In such cases, investors may commence proceedings before the International Centre for the Settlement of Investment Disputes (ICSID), the World Bank's arbitration centre. ICSID arbitration has the advantage of being legally “delocalised,” applying public international law standards, and its awards are enforceable in all 158 states that are parties to the ICSID Convention. Angola became the 50th African state to sign the Convention in 2022. (Notable non-members include Libya and South Africa.)

Traditionally, BIT-based disputes have largely involved foreign investors bringing claims against host governments. However, this landscape is beginning to evolve. A notable trend is the incorporation of new language in modern African BITs addressing environmental, social and human rights considerations. For example, the Nigeria-Morocco BIT signed in December 2016 introduces direct obligations on foreign investors, including requirements to conduct environmental impact assessments before establishing an investment, and to comply with environmental management standards thereafter. The treaty also obliges investors to uphold human rights in the host state, while affirming the state's discretion to regulate environmental matters.

More recently, on 19 February 2023, Member States of the African Union adopted the Investment Protocol to the African Continental Free Trade Area (AfCFTA). The Protocol includes provisions on climate action and sustainability, incentives for sustainable investment, and explicit recognition of governments' authority over public health priorities. It also introduces investor obligations relating to human rights, labour rights and environmental protections.

These developments illustrate the increasingly important role that Africa is playing in shaping modern BIT practice. Although the interpretation and long-term impact of these new treaty provisions remain to be seen, they represent significant reference points—and mark new dimensions—in the evolution of international investment arbitration across the continent.



Authors

Giuseppe Mistretta

Former Director for Sub-Saharan Africa at the Italian Ministry of Foreign Affairs and International Cooperation, and ex Ambassador to Angola and Ethiopia

Umberto Tavalato

Director for Special Projects, Med-Or Italian Foundation

Hussein Haeri KC

Partner and co-head of International Arbitration at Withers in London

Camilla Gambarini

Special Counsel at Withers in London and Milan

Luciano Pollichieni

Senior Analyst, Med-Or Italian Foundation

Corrado Čok

Expert on the Horn of Africa, Med-Or Italian Foundation

Adi Guyo

Junior Analyst, Med-Or Italian Foundation

Dan Morland

Senior Media & Communications Consultant, Med-Or Italian Foundation

Asja Amail

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



Distance Unites Us

med-or.org