

MOZAMBIQUE News reports & clippings

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Gas

LNG revenues will be much lower than predicted - and not for at least 18 years

Mozambique will earn \$55 bn from liquefied natural gas (LNG) in Cabo Delgado by 2048, the Instituto Nacional de Petroleo (INP) has predicted. But new studies suggest this is totally unrealistic, according to a report by Zitamar (23 Sept) based on research by OpenOil, a Berlin-based resource analysis firm. OpenOil predicts the LNG will only generate \$18 bn and not be profitable for the national hydrocarbons company, ENH. Mozambique gas prices are linked to oil prices, and if oil prices stay higher, then LNG income might be \$28 bn - half of what INP is predicting.

During the first 20 years, the government will get only \$7.2bn. This is because the exploration and development costs are "front-loaded" and the companies will only officially make a profit and start paying tax when those costs are recouped, after 2040.

The models are based on the two LNG projects currently in development: the TotalEnergies led project nearest the coast (Area 1), now halted, and the ENI Coral Floating LNG platform due to be in place next year (Area 4). They use financial projections published by the government and the gas companies. ENH holds 10% and 15% stakes in Area 4 and Area 1, respectively, and has borrowed money from project partners to finance its equity stake in the projects. The Ministry of Economy revealed the interest rates ENH is paying the consortia - 9%-13% for Area 1 and 8.7% for Area 4 - which are much higher than assumed in the model: This further reduces the chance of ENH actually making a profit for the state.

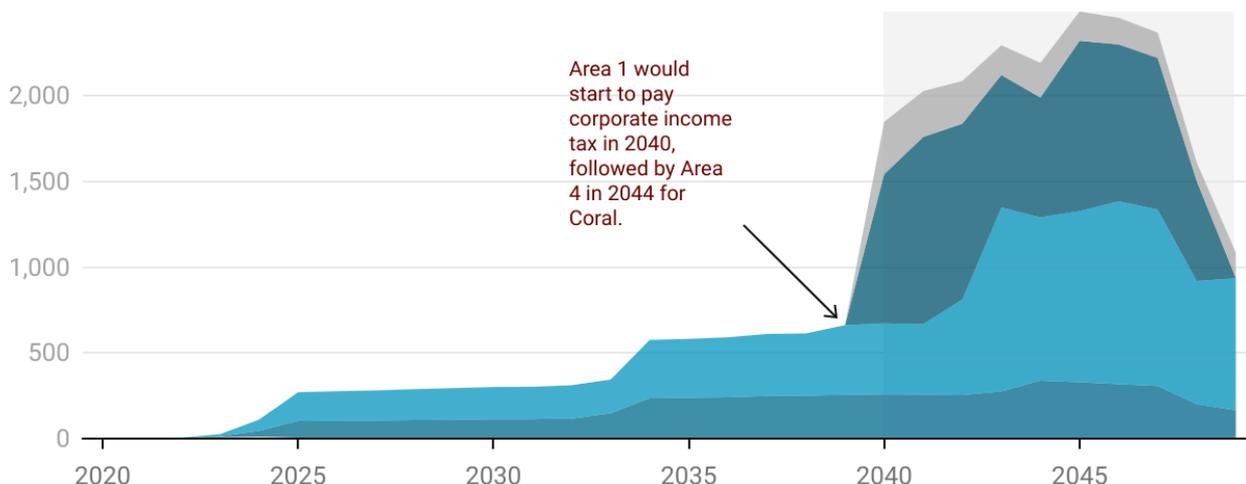
Finally, the chart below from Zitamar (23 Sept) shows how projected revenues only jump from 2040. But that is precisely when all forecasts are that climate change cuts to fossil fuels will really

start to hit production and consumption. That in turn is likely to hit oil prices. So that post-2040 profit bulge could be badly hit.

Mozambique's projected gas revenues

Significant revenues will only flow to the country's coffers after 2040

■ Fees, Charges and Bonuses ■ Petroleum Production Tax ■ Profit petroleum - Government
■ Corporate Income Tax - Project Level ■ ENH post-carry



Graphic includes Area 1 Golfinho (stage one) and Area 4 Coral FLNG. Figures are billion of US\$. 00 model alternative scenario based on INP price projection for downside scenario 2018.

Chart: Zitamar News • Source: Based on OpenOil analysis • Created with Datawrapper

The Zitamar paper (free) is on: <https://zitamar.com/the-great-gas-illusion-mozambiques-lng-revenues-may-fall-short-to-transform-the-country/>

There are three other related papers cited, and all reach similar conclusions:

"Too Late to Count: a financial analysis of Mozambique's gas sector", Johnny West & Daniela Q. Lépez, OpenOil, January 2021
<https://drive.google.com/file/d/1FjHZRvdH7AwYtGUJA6lg5reISAnt0XR/view>

"Government revenues from Coral FLNG, Don Hubert (PhD), Oxfam, 26 June 2020,
<https://www.oxfamamerica.org/explore/research-publications/government-revenues-coral-flng/>

"The Mozambican Hydrocarbons Company (ENH) Could Become a Burden for the Government", Inocência Mapisse, CIP, 2019 <https://cipmoz.org/wp-content/uploads/2019/05/ENH-1-1.pdf>

Norway says 'pervasively corrupt elite' is taking gas money

"In Mozambique, a pervasively corrupt political elite has been taking advantage of the gas wealth. The country's poor have suffered", declares the [Norwegian aid agency Norad in its magazine Bistandsaktuell](#) (20 Sept) The article was reporting on the 20 September announcement to end Norway's "oil for development" programme, by Dag-Inge Ulstein, the outgoing International Development Minister (after the 13 September election which the left won).

Oil for Development was established in 2005 to assist partner countries in the management of oil and gas resources to promote sustainable economic growth and welfare, but now the money will be used for greener projects.

In February 2020 with full pomp and ceremony in Maputo, Ulstein and Mozambique's Foreign Minister Veronca Macama signed a renewal of the Oil for Development Agreement while Crown Prince Haakon and President Nyusi looked on. After the signing, Ulstein admitted that the "Oil for Development" name was "out-dated".

At the signing, Ulstein said Mozambique's discovery of natural gas will not automatically lead to benefits for Mozambique and for development. The agreement underlines the need for openness and public scrutiny, and for an informed and strong civil society.

Gas developments will translate into tangible socio-economic benefits, according to Cabo Delgado governor Valige Tauabo. He aims to use energy sector developments as a catalyst for strong and sustainable economic growth across the province. (Africa Energy Chamber, 23 Sept) But with government income from gas running at best \$300-500 mn per year until 2040, how much will be left to trickle down for development?

War

The price of military help? **Rwandan exile gunned down**

Revocant Karemangingo, a Rwandan businessman and vice-president of the Rwandan Refugees' Association in Mozambique, was gunned down near his home in Matola on 13 September. After he left the pharmacy he ran in the Liberdade neighbourhood, three vehicles intercepted the victim's car in front of his house and then riddled it with bullets, killing Karemangingo.

Karemangingo had been prominent in calling for fellow Rwandan political exile Cassien Ntamuhanga to be released. Ntamuhanga was abducted in Inhaca, Maputo city, on 23 May by eight individuals claiming to be Mozambican police agents, accompanied by a man who was supposedly a Rwandan official. He has not been seen since, and it is believed he was handed over to the Rwandan embassy, so it is not clear whether he is alive or dead, and if he has been sent to Rwanda. Cassien has been in exile in Mozambique since 2017 and had been granted official refugee status.

There are 4000 Rwandan refugees in Mozambique, many of whom are opponents of Rwandan president Paul Kagame, who in turn has gained a reputation for killing opponents abroad. Karemangingo was accused of funding the opposition, and had been targeted in a failed assassination attempt on him in 2016. In 2012, the former head of the Rwanda Development Bank, Théogène Turatsinze, was found dead in a river near Maputo. In 2019 Louis Baziga, then the head of the Rwandan community in Maputo, was assassinated in Matola.

Rwandan refugees in Mozambique fear that as part of the deal to supply troops in Cabo Delgado, Kagame has been given a free hand to attack opponents living in Mozambique. The detention of Cassien was a month after President Filipe Nyusi met Kagame in Rwanda, and when a Rwandan military mission was in Cabo Delgado. So Rwandan refugees saw the arrest of Cassien as a sign by Nyusi that he was carrying out his side of the bargain.

Cleophas Habiwareme, the current refugee association president, said that in August there had been an failed kidnapping attempt on the association secretary and his brother. And this killing of Karemangingo was less than two weeks before the meeting of Kagame and Nyusi on 24 September in Cabo Delgado.

On 17 September the United Nations High Commissioner for Refugees called for a swift and thorough investigation into the murder of Karemangingo, and for the killers to be held to account. (Savana, Zitamar, AIM, CDD, DW, BBC, Lusa various dates; this newsletter 548, 551, 553)

Chatham House's Alex Vines warns: IS is 'a flag of convenience', and Frelimo must relearn lessons of independence struggle

The Islamic State (IS) affiliation is only "A Flag of Convenience", writes Alex Vines, Director of the Africa Programme at Chatham House, in the influential *Georgetown Journal of International Affairs*.

"Although there is debate over whether this violence is aimed at creating a new Islamic caliphate, this insurgency is still in its infancy and is mostly fuelled by local issues. The coastal regions of Cabo Delgado have historically been much neglected by the distant capital, Maputo ... Poverty levels are stubbornly high as is illiteracy. The longer-term solutions to this crisis are developmental, particularly regarding the need to provide jobs, better government and public goods."

Vines joins others drawing lessons from the liberation struggle. "Eduardo Mondlane, Frelimo's first president, wrote a book about fighting Portuguese colonialism, *The Struggle for Mozambique*. Mondlane reminds us that insurgency succeeds when there is an acute governance and developmental deficit. The Portuguese counter-insurgency efforts against Frelimo nationalists quickly failed because they had neglected the far north and responded solely with violence. Relearning the science of liberation and learning from the mistakes of the Portuguese and others could help Frelimo ... to stabilize the conflict of Cabo Delgado.

"The root causes of this insurgency are all Mozambican: inequality, abject poverty, local elite and ethnic politics, and organized crime. The longer-term solutions to this crisis are therefore mostly developmental, firstly to provide jobs to quickly demonstrate that non-violence can provide a viable alternative livelihood for ex-militants and secondly, that the government needs to become better at service delivery of public goods for all Mozambicans – not just those who support Frelimo."

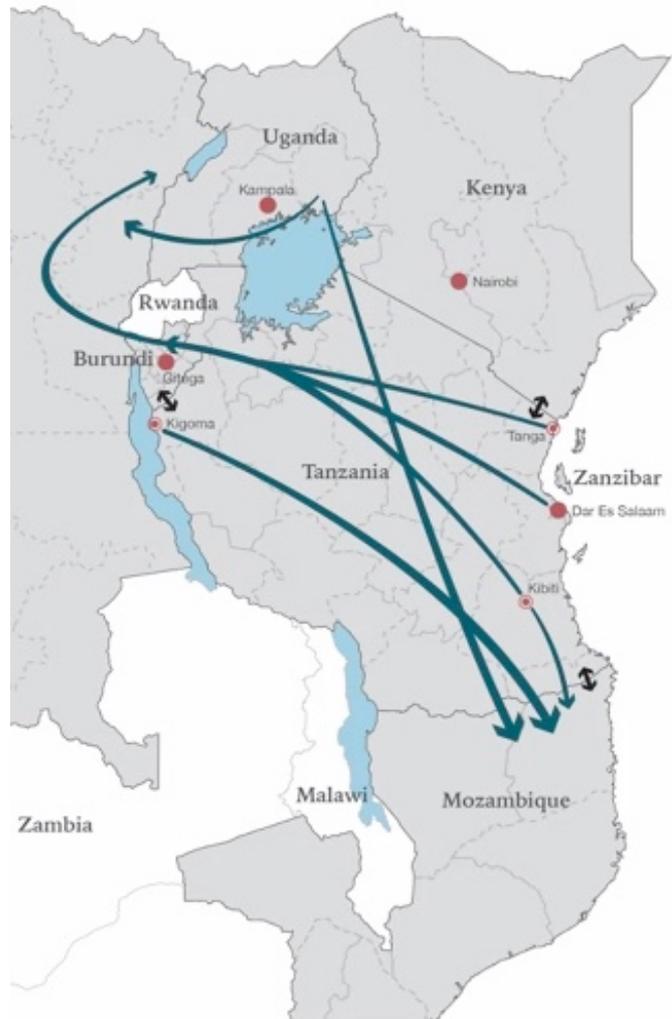
"Responding to Mozambique's Islamic Insurgency: Will Foreign Military Assistance Make a Difference?" by Alex Vines, *Georgetown Journal of International Affairs*, 15 Sep.
<https://gjia.georgetown.edu/2021/09/15/responding-to-mozambiques-islamic-insurgency-will-foreign-military-assistance-make-a-difference/>

Geography matters

To understand the war, it is useful to look at Cabo Delgado in as part of East Africa, and not just as part of Mozambique. The road distance from Mocimboa da Praia to Maputo is about 2700 km. The first map shows that going north, that same distance would take you to Mogadishu in Somalia or North Kivu in the Democratic Republic of Congo. Both are centres of Islamic militancy. And it is as realistic, and as easy, for a resident of Mocimboa da Praia to go to any of the three for training. Indeed, family and religious links in Tanzania probably make it easier to go north than south.



The second map (right) was presented by East Africa researcher Peter Bofin at an OMR webinar on 22 September. He makes two points. First, people in Maputo think Cabo Delgado is far away, and, indeed, Rwanda is closer to Mocimboa da Praia than is Maputo. Second, there is a serious insurgency by the Allied Democratic Forces (ADF) in the eastern Democratic Republic of Congo, in North Kivu just over the border from Rwanda, and its roots are in Uganda where it still has a presence. On 10 March the United States designated ADF as a terrorist organisation and called it ISIS-DRC as part of the same announcement that called Mozambique insurgents ISIS-Mozambique and designated it as terrorists.



Rwanda opened its embassy in Maputo in 2019. For Rwanda, fighting groups labelled as ISIS in the region makes Rwandan involvement in Cabo Delgado more logical. Although Rwanda probably has others reasons to want to be involved, looking at the map shows why its involvement is not unreasonable.

Displaced reach 745,000

There are now 744,949 people displaced by the Cabo Delgado war, the IOM (UN Migration, International Organisation for Migration) said in its 23 September report. Of the 642,404 displaced inside Cabo Delgado, 152,702 are in Pemba and 127,646 in neighbouring Metuge. Other districts with large numbers are Mueda 79,223, Montepuez 58,930, Nangade 51,945, and Ancuabe 50,283.

The numbers do not include Palma, Mocimboa da Praia and Muidumbe, because IOM could not gain access to count.

Outside Cabo Delgado, there are 99,448 war displaced in Nampula, 1,221 in Niassa, 1,602 in Zambezia, 164 in Sofala and 110 in Inhambane.

Full report, <https://displacement.iom.int/reports/iom-dtm-baseline-assessment-report-round-13-september-2021> Full dataset: <https://displacement.iom.int/datasets/mozambique---baseline-assessment---round-13>

In the Nacaca resettlement centre in Ancuabe district, displaced civilians staged a demonstration on 15 September to protest irregularities in the distribution of food aid. The local disbursement of World Food Programme (WFP) aid vouchers for September and October at Nacaca was marred by the same distribution list inconsistencies that have been noted throughout Cabo Delgado. Many displaced families found themselves excluded from the list, while locals were observed receiving food aid vouchers meant for displaced people. Some protesters attempted to assault workers involved in food aid distribution, but the groups were separated by police. (*Cabo Ligado* 21 Sep)

Nyusi: Not celebrating success

“We are not yet celebrating successes because we know the enemy we are facing. We are approaching the enemy step by step, and solving the problems that concern us at each moment”, said President Filipe Nyusi. “Yes, we are in a phase of success, but we aren’t singing or celebrating”. As he stressed that main priority is creating security to allow the resumption of the TotalEnergies gas project. (AIM 25 Sep)

He was speaking in Pemba, at a joint press conference with the visiting Rwandan President Paul Kagame, marking Armed Forces Day, the 57th anniversary of the launch of the national liberation struggle against Portuguese colonial rule on 25 September 1964.

The Rwandans rapid month-long offensive saw major fighting as they took insurgent bases in Awasse and Mbau and fought their way to Mocimboa da Praia, which was abandoned by the insurgents. Mozambican commanders then promised the rapid taking of the two main insurgent bases, Siri I and II (Siri means “secret” in Swahili), and the capture of insurgent leaders. But this has not happened.

However, military activity is continuing, and fishermen who had been working off the Macomia coast arrived on Ilha Matemo on 13 September and reported major operations by pro-government helicopter gunships in the area they had just left. They abandoned their fishing, the men said, because they feared being mistaken for insurgents by the helicopters. (*Cabo Ligado* 21 Sep)

Siri I and II are along the Messalo River 35 km south of Mocimboa da Praia in a strip of very dense forest, and appear to be more difficult to find and capture. The past month has seen few reports of major fights. And there are no reports of leaders or large numbers of insurgents killed and captured. Which suggests that insurgents are following standard guerrilla tactics, breaking up into small groups and moving away from the larger concentrations of Rwandan and SADC soldiers.

Indeed, a joint Rwanda-Mozambique-SADC force is in Niassa trying to stop insurgents from fleeing there. (*MediaFax* 14 Sep) There are serious worries about the insurgency spreading to Niassa. Cabo Delgado and Niassa are the only provinces with a majority Muslim population and share many of the same political and economic problems.

There have been insurgent attacks in Quissanga district. In Namaluco, Quissanga, insurgents on 16 September waylaid six civilians who were involved in brewing nipa, the local alcohol, killing five of them. One was able to escape and report the attack. Five others were killed in Quissanga on 22 September. (Pinnacle News 23, 24 Sep, Carta de Moçambique 21 Sep; *Cabo Ligado* 21 Sep)

Four people have been killed and an unknown number are missing after insurgents attacked two villages in Nangade district on 21 September

Troops rescued 60 women and 27 children and killed five insurgents who had been guarding them in a base in the forests of Quiterajo, Macomia. A young insurgent captured in fighting said he had killed at least one person, and was fighting for a better future with a Koran in one hand and a weapon in the other. (Pinnacle News 23 Sep)

Landmines and IEDs are being used by insurgents claims *Business Day* (19 Sep) and other South African press. *Business Day* shows a photo of an improvised explosive device (IED) connected to a mortar which used fertilizer - ammonium nitrate - as an explosive and a remote detonator triggered by a radio signal. The Rwanda Defence Force (RDF) confirmed that a Ratel mine-resistant vehicle on 12 September hit a landmine south of Mbau but the mine only destroyed the vehicle's tyres. Nobody was injured and the vehicle could move on after the tyres were replaced. *Business Day* says "sources in the security sector in Mozambique told Sunday Times Daily that more IEDs had been discovered in the same region as the landmine incident." <https://www.businesslive.co.za/bd/world/africa/2021-09-19-sadc-forces-tread-dangerous-ground-in-mozambique/>

Until now, insurgents have only used snipers to attack vehicles. Using landmines and IEDs would be a major increase of insurgent capacity.

There is confusion with the military labelling people as insurgents who may not be. Mozambican naval forces captured 20 men they alleged to be insurgents off the coast of Mocimboa da Praia town on 13 September. The men denied the allegations, saying that they were on their way to Palma. (*Cabo Ligado* 21 Sep) And an investigation by Nampula newspaper *Ikweli* (19 Sep), found that a group of alleged insurgents that Mozambican forces had captured in July and displayed for a television news broadcast were not insurgents at all. Instead, they were civilians from Monjane, Palma district, who were caught up in a roundup as Mozambican forces prepared for the arrival of Rwandan troops in Palma. Some of those shown on Mozambican national television in July have since been released, but others remain in custody. <https://ikweli.co.mz/2021/09/19/dificuldades-em-distinguir-civis-de-terroristas-periga-vida-de-nativos-nas-areas-de-conflito-em-cabo-delgado/>

Ikweli (22 Sep) also reports that local militias are executing suspected insurgents, including two local young men in Chai, Macomia, in July, and that the executions were videoed. <https://ikweli.co.mz/2021/09/22/milicianos-podem-estar-a-matar-inocentes-em-cabo-delgado/>

Electricity returned to Mocimboa da Praia 22 September and should be restored to Palma today (26 Sept). Insurgents destroyed the major substation and transformer at Awasse, which served northern districts, as well as doing major damage to power lines. The Awasse substation has been bypassed and lines now link directly to a substation in Macomia, and 80 km of lines and their low voltage transformers have been repaired by Electricidade de Moçambique (EDM) technicians.

"Mozambique militant attacks: 'So much destruction' " - Video of BBC's Deputy Africa Editor Anne Soy travelling into Mozambique with Rwandan troops, and filmed in Mocimboa da Praia. (24 Sep) <https://www.bbc.co.uk/news/av/world-africa-58671942>

Other news

Britain halving aid to Mozambique. The UK is cutting in half its aid to Mozambique, from £51 mn in 2020-21 to just £28 mn in 2021-22. The percentage cut is larger than of total aid, and aid has already been falling, according to the UK Foreign, Commonwealth and Development Office annual report issued 23 Sept.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1019938/FCDO annual report and accounts 2020 to 2021 accessible.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1019938/FCDO_annual_report_and_accounts_2020_to_2021_accessible.pdf)

This suggests the UK has lost interest in Mozambique. Programme aid peaked at £68 mn in 2018. Total aid reached £104 mn in 2019, but that included £36 mn in humanitarian aid; more humanitarian aid might be expected this year.

Antibiotic resistance in Maputo chicken. "There is a high circulation of antimicrobial-resistant *Campylobacter* in the broiler meat supply chain of Maputo, Mozambique, representing sources for human infections and highlighting the need for measures regulating antibiotics use in livestock production." This comes from the misuse of antibiotics by simply adding them to chicken feed. *Campylobacter* bacteria is the most common bacterial cause of diarrheal illness, and is most commonly spread by undercooked chicken. The study found high percentages of chicken from supermarkets, informal markets, and a slaughterhouse in Maputo had *Campylobacter* which was resistant to the most common antibiotics, such as tetracycline, doxycycline and penicillin. "Antimicrobial Resistance of *Campylobacter* spp. Isolates from Broiler Chicken Meat Supply Chain in Maputo, Mozambique". Joao Joao Matsimbe, et al. 9 Sept 2021 *Foodborne Pathogens and Disease* <http://doi.org/10.1089/fpd.2021.0001> (abstract with more data, free)

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\$2bn secret debt trial: Daily press clippings in English (and a few in Portuguese) on <https://bit.ly/Moz-secret-debt>. The trial is being broadcast live on TV; STV <https://play.stv.co.mz/> (click **Assista aqui**) and TVM <http://online.tvm.co.mz/site/emdirecto/tvm1>

Important external links

\$2bn secret debt trial (Aug-Oct 2021) press reports <https://bit.ly/Moz-secret-debt>
Exchange rates 2006-21 & minimum wages 1996-2021 <https://bit.ly/Moz-Exch-wage-2021>
Covid-19 daily updated data <https://www.facebook.com/miguel.de.brito1> and <https://covid19.ins.gov.mz/documentos-em-pdf/boletins-diarios/>
Daily flood and monthly dry season reports - <http://bit.ly/Moz-flood21>
Cyclone trackers, <https://www.cyclocane.com/> and <https://www.metoc.navy.mil/jtwc/jtwc.html>
Cabo Ligado weekly report on civil war <https://www.cabologado.com/>
Previous editions of this newsletter: <http://bit.ly/MozNews2021> and bit.ly/MozNews2020
Downloadable books: <http://bit.ly/Hanlon-books> Election data: <http://bit.ly/MozEIData>
My Mozambique archive: <http://bit.ly/Mozamb>

Cabo Delgado

Archive with reports, detailed maps, and census data <https://bit.ly/Moz-CDg>

Special reports on the war

Evolution of the war: global vs local. 27 Feb 2020 <http://bit.ly/CDelgadoOrigins>
Religion is shaping Cabo Delgado civil war. 30 April 2020 <https://bit.ly/CDelgadoReligion>
Intensifying argument over roots of war. 28 June 2020 <https://bit.ly/Moz-492>
Are the drums of war silencing any hope of peace? 26 July 2020 <http://bit.ly/Moz-496>
A history of violence presages the insurgency. 13 August 2020 <http://bit.ly/Moz-498>
Military & economic intervention. 3 Sept 2020 <https://bit.ly/CDelgadoIntervene>

Mozambique heroin transit trade

English - LSE - 2018 - <http://bit.ly/Moz-heroin>
Portuguese - CIP- 2018 - <http://bit.ly/HeroinaPT>
2001 first article- *Metical* - English and Portuguese <https://bit.ly/MozHeroin2001>

Gas for development?

Gas_for_development_or_just_for_money?_2015 bit.ly/MozGasEng
Gás_para_desenvolvimento_ou_apenas_dinheiro?_2015 bit.ly/MozGasPt

Background reading

Special reports

Social protection report - 2017 Mozambique - <http://bit.ly/MozSocPro>

Special report on four poverty surveys: bit.ly/MozPoverty

\$2bn secret debt - in English

Secret debt trial (Aug-Oct 2021) press reports <https://bit.ly/Moz-secret-debt>

Kroll - Full report on \$2bn debt - <http://bit.ly/Kroll-Moz>

Kroll report summary - <http://bit.ly/Kroll-sum>

Key points of Mozambique parliament report - Nov 2016 - <http://bit.ly/MozAR-debt-En>

Following the donor-designed path to Mozambique's \$2.2 bn debt - <http://bit.ly/3WQ-hanlon>

In Portuguese:

Parliamentary Report on the Secret Debt (complete) bit.ly/MozAR-debt

2018 Constitution - <http://bit.ly/2KF588T>

Election study collaboration: We have detailed election data from 1999 through 2014 and are inviting scholars to use this data collaboratively. <http://bit.ly/MozEIData>

Election newsletters are on <http://bit.ly/2H066Kg>

Nine books by Joseph Hanlon can be downloaded, free: <http://bit.ly/Hanlon-books>

Bangladesh confronts climate change (2016)

Chickens and beer: A recipe for agricultural growth in Mozambique (2014) is on <https://bit.ly/Chickens-Beer>

Há Mais Bicicletas – mas há desenvolvimento? (2008)

Moçambique e as grandes cheias de 2000 (2001)

Mozambique and the Great Flood of 2000 (2001)

Paz Sem Benefício: Como o FMI Bloqueia a Reconstrução (1997)

Peace Without Profit: How the IMF Blocks Rebuilding (1996)

Mozambique: Who Calls the Shots (1991)

Mozambique: The Revolution Under Fire (1984)

Apartheid's 2nd Front (1986) <available shortly>

These are still available for sale:

Galinhas e cerveja: uma receita para o crescimento (2014) (free in English)

Zimbabwe takes back its land (2013)

Just Give Money to the Poor: The Development Revolution from the Global South (2010)

Do bicycles equal development in Mozambique? (2008) (free in Portuguese)

Beggar Your Neighbours: Apartheid Power in Southern Africa (1986)

Mozambique media websites, English:

Club of Mozambique (free): <http://clubofmozambique.com/>

Zitamar (paywall): <http://zitamar.com/>

Mozambique media websites, Portuguese (all with partial paywall):

Notícias: www.jornalnoticias.co.mz

O País: www.opais.co.mz

@Verdade: <http://www.verdade.co.mz>

Carta de Moçambique <https://cartamz.com>

Mozambique think tanks and pressure groups, Portuguese:

Centro de Integridade Pública: CIP <https://cipmoz.org/>

Observatório do Meio Rural: OMR <https://omrmz.org/>

Instituto de Estudos Sociais e Económicos: IESE <https://www.iese.ac.mz/>

Centro Para Democracia e Desenvolvimento CDD <https://cddmoz.org/> (some CDD in English)

Also CDD now controls Fórum de Monitoria do Orçamento - FMO (main debt group) <http://www.fmo.org.mz>
and RMDDH - Rede Moçambicana dos Defensores dos Direitos Humanos (a human rights group).

To subscribe to all CDD publications: <http://eepurl.com/gO9l6v> (English or Portuguese).

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