

MOZAMBIQUE News reports & clippings

572 5 October 2021 Editor: Joseph Hanlon (j.hanlon@open.ac.uk)

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Total says LNG will go ahead, but three years late

TotalEnergies expects Mozambique LNG to go ahead and to be producing in 2026 or 2027 - two or three years delayed from the expected start of 2024. It will play a part in TotalEnergies' planned doubling of LNG sales between 2000 and 2030. The other contributors to the growth are Russian arctic, Papua and US, according to the TotalEnergies Strategy and Outlook document presented at the 28 September shareholders meeting: https://totalenergies.com/system/files/documents/2021-09/2021_TotalEnergies_Strategy_Outlook.pdf On 6 September Total signed a \$27 bn gas, oil, and solar deal with Iraq.

Publishing it in an investor document makes it a firm commitment. But Patrick Pouyanné, TotalEnergies CEO, clarified that 2026 is dependent on staff returning to Mozambique in early 2022, but that is not guaranteed. "There are some positive evolutions on the ground but they have to be consolidated". If remobilisation is delayed further, first gas could be pushed to 2027, reported Tom Wilson, Acting Senior Energy correspondent of the *Financial Times*. (28 Sep [@thomas_m_wilson](https://twitter.com/thomas_m_wilson)) This was confirmed by Finance Minister Adriano Maleiane who told an African Development Bank conference on 29 September that it would take a year to restart work, meaning production only in 2027. (*O Pais* 1 Oct)

Total is explicitly betting that the 26th UN Climate Change Conference (COP26) in Glasgow on 1-12 November will not crack down hard on fossil fuels, and allow gas consumption to grow. He is also betting that proposals for Rwandan troops to provide long term security will be confirmed quickly to allow work to restart. It also seems likely that ExxonMobil, the holder of the other half of Cabo Delgado Area 1, will not go ahead, and sell its interest, probably cheaply, to Total.

The decision to go ahead will have major knock-on effects in four areas, discussed in articles below: internal politics, local climate impact, trees, and the return of war displaced people.

For political reasons, Nyusi needs Total starting sooner

Energy Minister Maz Tonela said on 30 September that government would meet shortly with Total to try to convince them that security was good enough that for a return to work early next year. (*O Pais* 1 Oct) It underlined just how much the gas and Cabo Delgado war has become part of the political battle within Frelimo.

The next Frelimo Congress will be held in just a year, on 23-28 September 2022. The Congress will select the people who will choose the next presidential candidate, thus the likely president. Mozambique has a two term limit, so Filipe Nyusi cannot stand again.

There is now an intensifying battle between the two "big beasts" - President Filipe Nyusi and former President Armando Guebuza, who are fighting for control of the party and the choice of the next president. Power over Frelimo gives economic and patronage power, and also protection against legal actions for misconduct.

Cabo Delgado is key to Nyusi's campaign. He brought in the Rwandan troops, apparently without party approval, and he wants them to "win the war" quickly enough for Total to be seriously back at work before the Congress. That will be a huge boost for his prestige. Indeed, it could be the key victory that allows the party to change the constitution to allow him a third term. So a Rwandan victory and Total's early return is essential for Nyusi keeping power.

The \$2 bn secret debt is the other big battle zone. Guebuza was president and his people organised the loan, but Nyusi was his Defence Minister and some of the money for both party and military equipment probably passed through his hands. All of those on trial are part of Guebuza's entourage, including his son Ndambi. But many of them have used the televised trial to ask why Nyusi is not on trial. The state TV station, TVM, has stopped its live broadcast of the trial - probably because of the challenges to Nyusi. But it is still live on STV.

The battle is also in print and social media, with Nyusi's big retinue of praise singers on social pushing for a third term. But the other side this year sit up the newspaper *Evidências* to attack Nyusi. The struggle will get nastier in coming months, and a clear win on Cabo Delgado and gas would be the boost Nyusi needs.

COP26: gas and cyclones?

Much hinges on a very tiny number. The 2016 Paris agreement "to limit global warming to well below 2°, preferably to 1.5° Celsius, compared to pre-industrial levels" was a political fudge. Half a degree seemed too small to argue about. But in 2018 the Intergovernmental Panel on Climate Change (IPCC), the official and highly respected research agency, issued a report comparing 1.5° and 2° and it found the impact is unexpectedly huge. IPCC said 2° would bring higher land and sea temperatures, hotter extremes in most inhabited regions, as well as heavy rain in some places and drought in others.

The fossil fuel industry has opted for the high 2° target, which allows a major increase in LNG (Liquefied Natural Gas) production. The International Energy Agency (IEA) published a dramatic report on 18 May which showed that to reduce global carbon dioxide (CO₂) emissions to net zero by 2050 and to limit the long-term increase in average global temperatures to 1.5° C, requires that "beyond projects already committed as of 2021, there are no new oil and gas fields approved for development." Gas has hit its peak and there can be no increase. The IEA is part of OECD and thus represents establishment, mainstream thinking. So when it says gas is done, that carries significant weight. Only two Cabo Delgado projects fit within the window - ENI's floating LNG plant and Total's suspended project.

It seems likely that the COP26 will back 2° and leave it for their children to try to return to 1.5° if they want to. There will be a crackdown on coal but not gas and oil, and back the gas and oil industry line on 2°. Indeed Total sees Mozambique as part of a huge increase in gas production.

A chart comparing likely gas consumption with 1.5° and 2° targets along with many more details and explanations of the difference, is in our special report on <https://bit.ly/Moz-Gas-Future>

Most recent forecasts are that global 2° compared to 1.5° will make Mozambique hotter and drier, leading to droughts and reduced food production in the south, and there will be much more intense cyclones. Cyclone Idai which hit Beira in 2019 was the deadliest tropical cyclone ever recorded in the Southern Indian Ocean basin and is now accepted as a cyclone made worse by climate change. This is the new normal. Mozambique will receive little revenue from the gas until 2040, but the climate crisis costs of drought and worse cyclones are already here. (see this newsletter 567, 570)

In 2015 at the Paris COP 21, the rich countries which have caused the climate emergency agreed to a system of jointly providing \$100 billion annually by 2020 to poor countries for mitigation and adaptation. But it did not happen. And Mozambique received aid of only half the cost of the damage of Cyclone Idai, and two-and-a-half years later there are still 93,000 people displaced.

Agreeing on the 2° target means a huge increase in gas production, and a huge increase in climate damage in Mozambique.

And the children will pay

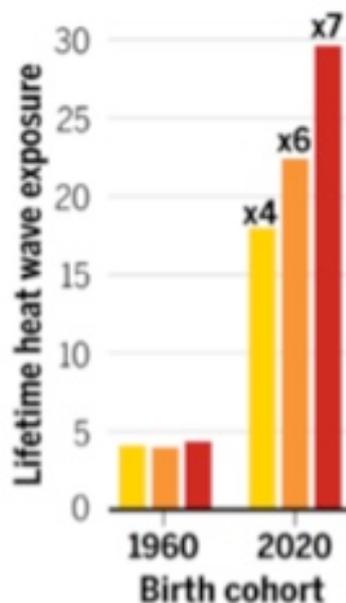
Mozambique's children will already pay a higher price for climate change, even if we commit to 1.5°C, but accepting 2°C raises the price, according to a 26 September article in the prestigious journal *Science*. And if the children decide they have to go for 1.5°C to reduce the damage, they will pay a massive price in living standard changes,

The article "Intergenerational inequities in exposure to climate extremes" is on <https://www.science.org/doi/10.1126/science.abi7339> The main article is behind a paywall but the supplementary material which has more detailed data and maps relating to Mozambique can be downloaded free.

The study looked at six types of extreme events. Global heating has a major impact on three of them in Mozambique - heat waves, river floods, and droughts. Global heating has a significant but smaller impact in Mozambique on cyclones and crop failures. Their sixth extreme event, wildfires, does not seem an issue in Mozambique. (Supplementary Figure 8)

"Changes in extreme event frequencies have relatively little effect on lifetime exposure for cohorts above age 55 in 2020, but this rapidly changes for younger cohorts as they experience increasing extreme events in the coming years and decades," the report says. The diagram compared the group born in 2020 across the world with the group just born, in 2020. The over 60 group has 4 extreme heat waves in their lifetime and for most no more will occur.

But for those born last year, it depends on current decision makers, mostly in the over 60 group. If global heating is kept to 1.5° (left, yellow bar), then last year's child will face 18 heat waves



Science, Thiery et al

- 4 times as much as their grandparents. If heating is kept to 2°, this jumps to 22 events, 6 times as much (middle, orange bar). And if we stick to current pledges, that child will experience 30 heat waves in its life (7 times as much).

For sub-Saharan Africa, the over 50s get off easy, the 20 to 50 age group gets hit, but those born in the last 20 years will be really hammered. The authors have maps comparing all countries and for a single type of event and all events combined. For Mozambique for all events, with 1.5° someone born in 2020 will see twice as many extreme events as someone born in 1960. And at 2° it will be 3 times as many as the now 60-year-old.

Cyclone Idai showed Mozambicans what an extreme event looks like. But it will get much worse. Only those aged under 40 years today will live to see the consequences of the choices made on emissions cuts. Those who are older will have died before the impacts of their choices become apparent in the world.

The research group [Carbon Brief](#) says that today's children will need to emit eight times less CO₂ over the course of their lifetime than their grandparents, if global warming is to be kept below 1.5°C. That means the G7 decision to accept 2° and leave 1.5° to their children means their children will need to make massively larger lifestyle changes to prevent the climate crisis. When current leaders will be retired or dead.

What does 'net zero' mean for Mozambique

Total in its presentation commits to "net zero" CO₂ emissions. Gas is billed as a "transition energy" and Total plans to use continued oil sales to ensure "strong cash generation to fund the transition and return to shareholders".

"Absolute zero" means no greenhouse gas emissions. But another compromise in the 2015 Paris agreement was the call for "net zero" by 2050. The "net" means that for any greenhouse gas emitted, an equal amount must be removed. The idea is controversial because it is based on deciding on equivalences and is organised through carbon trading, which up to now has been unregulated and corrupt. Carbon credit prices have risen from €5 per tonne of CO₂ in 2017 to €65 last week.

The biggest way to do carbon offsets is by planting trees. Total in its 2020 report "Getting to Net Zero" talks about using carbon credit from tree planting. So the carbon in trees is likely to become a major export crop for Mozambique. Tens of millions of trees will be planted, in giant plantations.

Giant forestry projects in the past two decades have largely failed and have come into huge conflict with local people. And a high profile pilot project in Gilé, Zambézia has proved highly controversial. Set up in 2015 with support from the World Bank and UN Redd+ programme, it is to reduce deforestation and degradation jointly with local communities. And it has received substantial publicity from its backers as a model carbon credit project. Agriculture Minister Celso Correia said on 12 August that Mozambique would get \$50 mn from the carbon credits. But who does that money go to? Natacha Bruna of the Rural Observatory (OMR) presented a paper at the August IESE conference which showed a different picture.

Bruna found that in order to be registered for Redd+ and carbon credits, the projects had restricted local people from their traditional access to forests and they could not gather forest products that were part of their normal life. Their access to farmland and water was reduced, and food insecurity increased. The money they received did not compensate for the losses. Local people also complained about the way the money was distributed.

And what are the implications for IDPs

Northern Tete province has 1.6 mn hectare available for agricultural investors, the Provincial Secretary Tete Elisa Zacarias, told the Maputo International Trade Fair on 2 September. Governor

Domingos Viola went further and said 4 mn hectares of farmland were available. (*Diario Economico* 3 Sep) It was, again, a mark of senior Frelimo and government officials offering land to foreign investors. It feels like ProSavana again, when 11 mn hectares was offered to investors in the 2010s - and that project was defeated by the peasants who already occupied the land.

Thus the biggest obstacle for developing carbon credit plantations will be accommodating and relocating the people already on the land, who have in the past opposed such projects because they would lose out. Which suddenly makes Cabo Delgado interesting. Nearly the entire war zone of five districts has been cleared, with 745,000 war displaced people. This leaves more than 400,000 hectares empty of people, and some senior people seem to be discouraging their return.

Anadarko (now Total) has onshore exploration rights for 13,580 sq km (1.4 mn ha) in that zone which has blocked mining licences and major agriculture development in Macomia, Mocimboa da Praia, Nangade and Palma districts. There is no useful onshore gas or oil, but there appears to be a wide range of minerals including gemstones, gold and graphite. And a huge amount of unoccupied farmland.

It does appear that the Cabo Delgado oligarchs want to keep that land empty in order to make deals, in partnership with foreign companies, for mining and plantation agriculture. Palm oil and carbon credits would both be attractive export crops.

Other news

Demonstration for fair elections

Thousands of people [demonstrating for free and fair elections](#) - but not in Maputo - in Luanda 11 September. Are Mozambicans afraid to march on the National Elections Commission? Or do they not care? We have many elections NGOs, but none organised a march to protest stuffed ballot boxes and fraudulent electoral rolls in 2019.



Two BBC reports

"Mozambique's tuna corruption scandal puts justice on trial" (BBC 3 Oct) is a good summary of the secret debt trial to date, and its avoidance of Nyusi and Guebuza.

<https://www.bbc.co.uk/news/world-africa-58733063>

"Sons of Mocímboa: Mozambique's terrorism crisis" (BBC 3 Oct) is a 13 minute film showing that insurgents are identified local people from Mocimboa da Praia.

<https://www.bbc.co.uk/news/av/world-africa-58767659>

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To cite for academic purposes, treat as a blog or a newspaper. Normal citation format would be:

"Mozambique News Reports & Clippings, number XXX", DATE, bit.ly/Mozamb, accessed XXX.

\$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 STV <https://play.stv.co.mz/>

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.caboligado.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)
Beggars 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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