



EAST AFRICA: 2025 Q1 SITUATION REPORT

EIGENRAC

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Key Events and Findings

Somalia saw a sharp resurgence in Al-Shabaab activity, reversing recent security gains. Militants launched coordinated offensives in Hiraaan and Middle Shabelle, briefly seizing towns and attempting to assassinate the president. While Somali forces, with U.S. and Turkish support, have countered some attacks, the group remains operationally strong, especially as AU forces draw down. The northern Las Anod conflict also persists, fracturing the country further ahead of elections.

Ethiopia remains tense as the peace deal in Tigray falters amid leadership splits. Renewed clashes in Tigray and persistent violence in Amhara and Oromia reflect a fragile security environment. While Addis Ababa signed a ceasefire with one Oromo Liberation Army faction, others remain active, and Eritrea's troop mobilization near the border sheds light on the risk of escalation.

South Sudan faces growing instability. The extension of its transitional government to 2026 has sparked discontent, and major fighting in Upper Nile displaced over 50,000 people. The arrests of opposition figures and Uganda's air support to Juba highlight the state's fragile power-sharing framework and rising regional entanglement.

Kenya remained comparatively stable but faced sustained threats from Al-Shabaab. The government postponed border reopening with Somalia after attacks in Garissa and escalated military coordination. Politically, tensions eased somewhat after Ruto's power-sharing outreach to the opposition, though economic pressures linger.

Uganda intensified operations against ADF rebels in DRC and cracked down hard on opposition at home. The abduction of Kizza Besigye in Nairobi and mass arrests reflect growing authoritarianism. While security is maintained through force, underlying political tensions are rising.

Tanzania maintained internal stability and made measured political reforms, but continues to monitor jihadist spillover risks from Mozambique. Security operations and intelligence-sharing remain active, especially along the southern corridor tied to regional energy infrastructure.

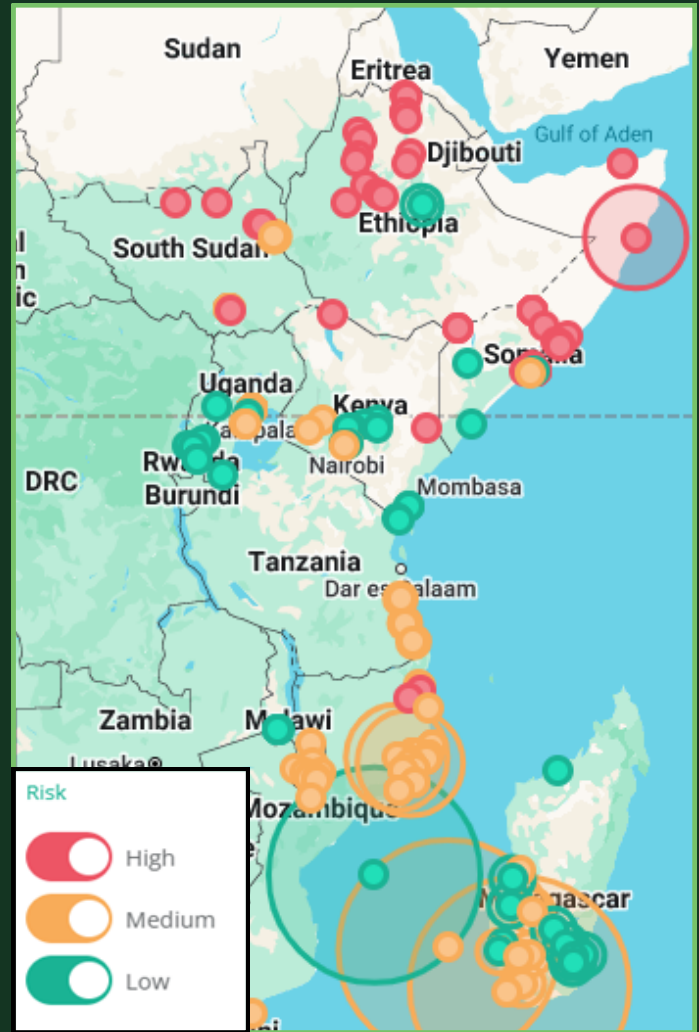
Rwanda and Burundi are internally stable but regionally exposed. Both are deeply entangled in eastern Congo's conflict, backing rival factions. A diplomatic flare-up in March saw Burundi accuse Rwanda of plotting an attack, though tensions were later dialed down. Domestically, both regimes retain strong internal control despite simmering dissent.

Mozambique is navigating a two-front crisis. Post-election unrest since late 2024 has led to over 250 deaths and large refugee flows to Malawi. Simultaneously, the Islamist insurgency in Cabo Delgado continues at a lower tempo but remains unresolved, straining military and political bandwidth.

Madagascar experienced post-election tensions after a disputed vote in late 2023. Protests were met with repression, and the opposition remains marginalized. While calm has returned, the state's heavy-handedness has deepened divisions and weakened public trust.

Malawi has faced growing economic unrest and pressure from refugee inflows due to Mozambique's crisis. Inflation, unemployment, and protests have stressed the state's response capacity, though the political scene remains stable for now.

Djibouti remained secure but authoritarian. President Guelleh's regime maintained tight control, suppressing dissent. The country's geopolitical importance as a military hub and port remains high, with foreign basing continuing to anchor its external relevance.



Assessment

In early 2025, East Africa's security outlook has been defined by the reactivation of unresolved conflicts and new waves of political unrest. From Somalia's militant resurgence to Ethiopia's unraveling federal cohesion, internal fault lines are reopening at speed. South Sudan's fragile peace has fractured, and Mozambique's election-triggered upheaval adds to the region's instability. Most conflicts are driven by internal political rivalries, ethnic grievances, or unmet promises of power-sharing – often worsened by weak institutions and economic fragility. Importantly, several of these crises are cross-border in effect, drawing in neighbors either militarily (e.g. Uganda in South Sudan, Rwanda and Burundi in DRC) or through refugee flows (e.g. Malawi from Mozambique). Militant threats – notably Al-Shabaab and the ADF – remain durable, exploiting governance vacuums and logistical terrain to reassert themselves.

Still, there are anchors of stability and containment. Countries like Tanzania, Djibouti, and to some extent Kenya have preserved relative calm and positioned themselves as regional buffers. Ongoing cooperation between AU and regional governments has preserved critical military operations (e.g. ATMIS in Somalia, Shujaa in DRC). Mediation efforts – particularly via IGAD and the East African Community – have helped de-escalate flashpoints, even if permanent resolution remains elusive. Political restraint in some quarters, like Tanzania's gradual opening or Kenya's détente, suggests lessons are being learned. Yet, East Africa's security balance remains fragile: governance reforms are partial, conflict fatigue is rising, and economic challenges risk inflaming unrest in already-vulnerable areas.

There is also a growing geopolitical dimension to East Africa's instability. Countries such as Djibouti, Kenya, and Somalia are becoming increasingly important to external powers due to their port access, energy corridors, and strategic location near global trade routes. As a result, the region has seen an uptick in foreign military basing, infrastructure investment, and diplomatic posturing – particularly by Gulf states, China, and the U.S. While this brings in resources and security support, it also adds complexity. Some local conflicts risk being internationalized or influenced by foreign competition. The sustainability of foreign-backed development and security projects will depend on how well regional governments can balance sovereignty with external dependencies.

Impact

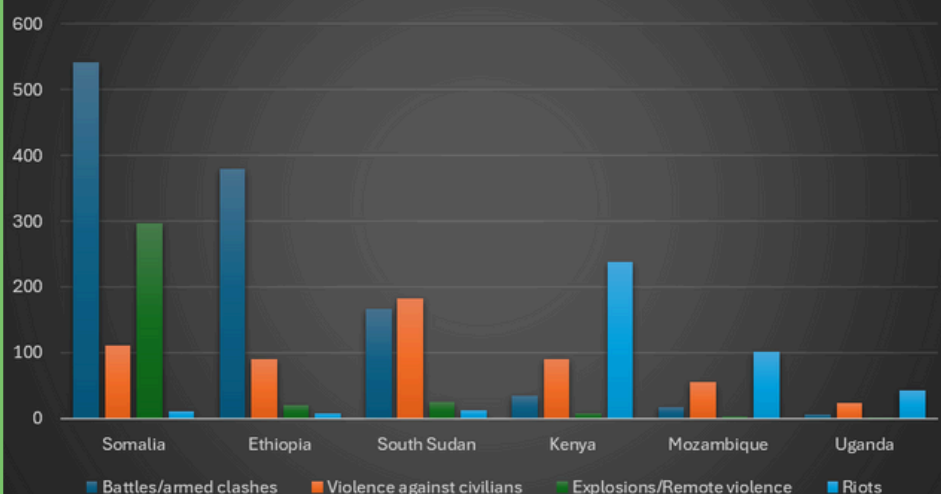
The fluid security environment across East Africa is introducing operational and financial pressures for international businesses – including those in the financial services and extractives/natural resources sectors. Conflict-related disruptions and governance instability are delaying projects, inflating security costs, and reshaping market risk calculations. While stable markets like Kenya, Tanzania, and Djibouti remain attractive anchors, firms with exposure across multiple jurisdictions must recalibrate their strategies to reflect persistent volatility.

At the same time, the risk-return calculations are shifting across the region. Investors are becoming more selective, channeling capital toward states demonstrating credible reform or political maturity. At the same time, international lenders and insurers are tightening thresholds for high-risk environments, which could constrain access to financing or increase reliance on multilateral guarantees. For extractives, this could mean project slowdowns or renegotiation in conflict-prone zones. For financial services, the operational footprint is increasingly shaped by political risk models, cyber exposure linked to instability, and shifting regulatory pressures – especially in countries navigating sanctions, insurgencies, or capital controls.

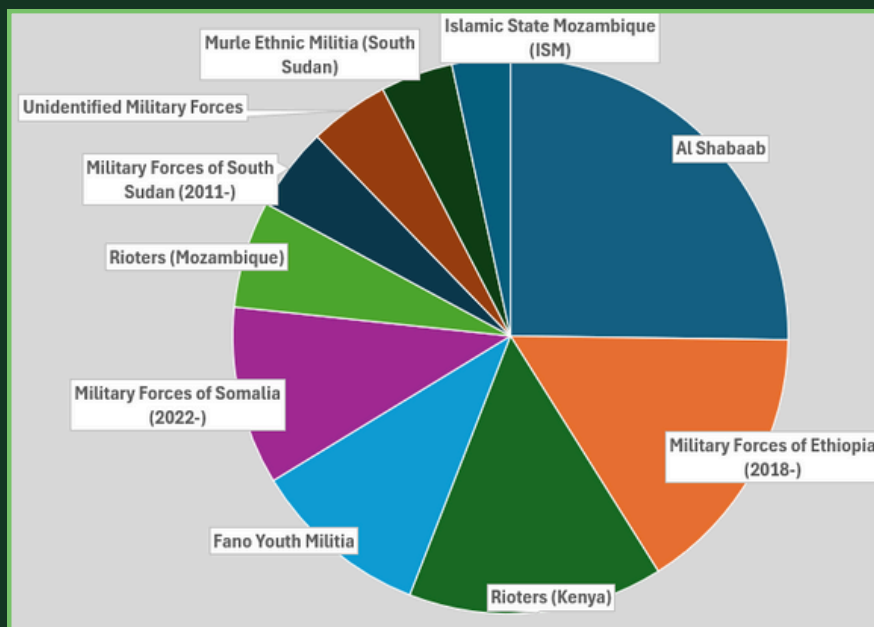
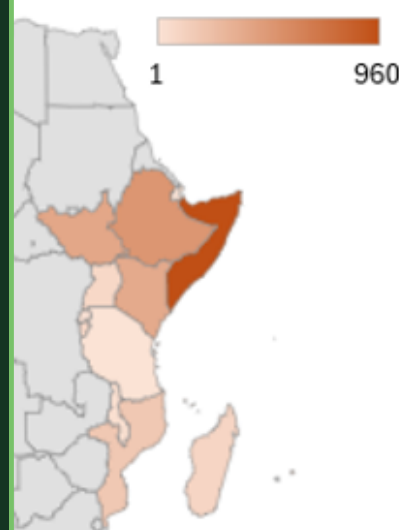
Sectoral considerations:

- Oil and gas operations in South Sudan face repeated disruptions, with recent fighting and infrastructure insecurity threatening output and transit continuity.
- Mining and LNG projects in Mozambique are again under review as election-linked unrest and jihadist threats undermine investor confidence and raise operational risk.
- Financial institutions in Ethiopia, Sudan, and South Sudan face rising credit and political risk, while cross-border lenders (especially in Kenya and Uganda) must account for exposure to regional shocks.
- Infrastructure projects, including the EACOP pipeline and regional trade corridors, face reputational and logistical risks in areas adjacent to unrest.
- Insurance and risk premiums are rising across border regions, with providers reassessing cover for energy, transport, and commercial assets exposed to militia activity or state instability.

Incidents of political violence: 5 most affected in East Africa [Jan - Mar 2025]



Incidents of political violence: Eastern Africa [Jan - Mar 2025]



Top 15 Primary Conflict Actors: East Africa [Jan-Mar 2025]