



NORTH AFRICA: 2025 Q1 SITUATION REPORT

EIGENRAC

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Key Events and Findings

Sudan's Conflict

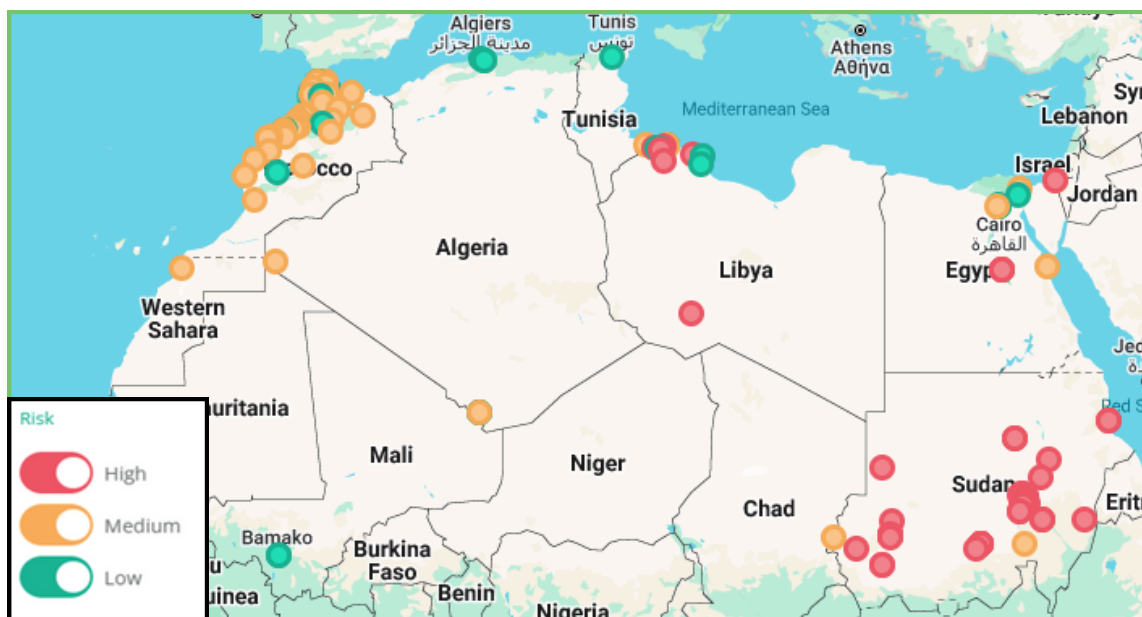
The war between Sudan's army (SAF) and the Rapid Support Forces (RSF) intensified, with the army scoring major gains by late March 2025. SAF drove RSF fighters out of central Khartoum, reclaiming the presidential palace and airport. Despite this turning point, the conflict is far from over, with RSF still entrenched in Darfur and fears of a de facto east-west partition of Sudan. The humanitarian toll is catastrophic – over 10 million people have been internally displaced and millions more need aid.

Tunisia's Unrest and Migration Crisis

President Kais Saied's government escalated its crackdown on dissent. A mass trial of some 40 opposition figures began in March, drawing condemnation from rights groups as a "politically motivated" purge. Public discontent simmers: on January 14 (the revolution's anniversary), protesters in Tunis demanded the release of political prisoners and restoration of freedoms. Meanwhile, Tunisia faces an unprecedented migration crisis – authorities dismantled camps housing thousands of sub-Saharan migrants and began mass deportations in April, after previously preventing many from crossing the Mediterranean. Local NGOs slammed the crackdown as fueled by racist rhetoric even as European partners praised Tunisia for stemming migrant flows.

Libya's Stalemate and Militia Volatility

Libya remained divided between rival authorities in Tripoli and the east. The long-delayed elections are still stalled – in February the UN formed a new advisory panel to break the impasse and resolve disputes blocking national polls. On the ground, security is fragile: armed militias continue to jockey for power. Notably, on January 22, heavy clashes erupted between rival militias in western Tripoli, terrifying residents (though no civilians were reported killed). The Tripoli-based Interior Ministry vowed to use force to rein in rogue militias and reassert state control over the capital. Sporadic fighting over resources also flared in other areas of western Libya, underscoring the persistent risk of violence.



Egypt's Security Posture

Egypt maintained relative internal stability amid regional turmoil, but faced security pressures on multiple fronts. In late January, thousands of Egyptians, along with officials and lawmakers, protested at the Rafah crossing to reject any plan to permanently resettle Palestinians from Gaza in Sinai – underscoring Egypt's firm stance against spillover from the Gaza war. In North Sinai, the military continued counterinsurgency operations against Islamic State-affiliated militants, with no major terrorist attacks reported in early 2025 (a sign that the Sinai insurgency has been largely contained). However, Cairo's deepening economic crisis has fueled public frustration, raising concerns about potential unrest. Egypt also grappled with refugee inflows from Sudan's war and worked to secure its borders with Libya and Gaza.

Algeria and Morocco – Tensions Simmer

Algeria and Morocco remained on uneasy footing, with diplomatic relations still severed. A notable incident occurred on April 1, when Algeria announced it had shot down a reconnaissance drone that entered its airspace from Mali. Algiers accused Mali (ruled by a junta aligned with Wagner mercenaries) of flying the armed drone near Tin Zaouatine, an Algerian border town, calling it a serious provocation. The incident highlights Algeria's growing concern about Sahel insecurity and foreign (Russian) mercenaries on its doorstep. Meanwhile, Algerian-Moroccan rivalry persisted: Algeria, newly on the UN Security Council, signaled it would press Morocco over Western Sahara, and condemned planned France-Morocco military exercises near its border as an "unjustified escalation." In Western Sahara, low-intensity hostilities between Morocco's military and the Algeria-backed Polisario Front continued into 2025. While full-scale war is unlikely, occasional flare-ups – such as the Polisario's deadly rocket attack on the city of Smara in late 2023 – have shed light on the risk of escalation.

Assessment

The first quarter of 2025 has reinforced the fragmented nature of North Africa’s security environment. Sudan’s civil war entered a new phase as the army reclaimed most of Khartoum, but territorial division and humanitarian collapse persist. Libya remains in political limbo, with militia volatility in Tripoli and no clear electoral roadmap. Tunisia and Egypt have leaned on authoritarian controls to preserve internal order, though both face mounting socio-economic pressure. Algeria and Morocco remain locked in strategic hostility, with renewed frictions over military activity near contested borders.

Security threats are increasingly shaped by spillover risks from the Sahel, where instability in Mali and Niger is testing Algeria’s southern posture. Libya’s southern regions and Sudan’s western frontiers are similarly exposed to cross-border arms flows and transnational movements. While terrorism inside North African states has largely been contained, the proximity of ungoverned spaces and foreign mercenary activity has kept national security forces on high alert. Low-intensity insurgency in Western Sahara and the unresolved Sudan conflict continue to strain regional crisis management mechanisms.

Despite this, several stabilizing factors are holding. Regional powers have so far exercised restraint, and international diplomatic frameworks—particularly the UN-led process in Libya—have kept some pressure on political actors. Economic and security partnerships with Gulf states and Europe are central to regime survival in Egypt and Tunisia. However, without structural reforms or conflict resolution progress, the region risks further entrenchment of security fragmentation and eroding public trust in institutions.

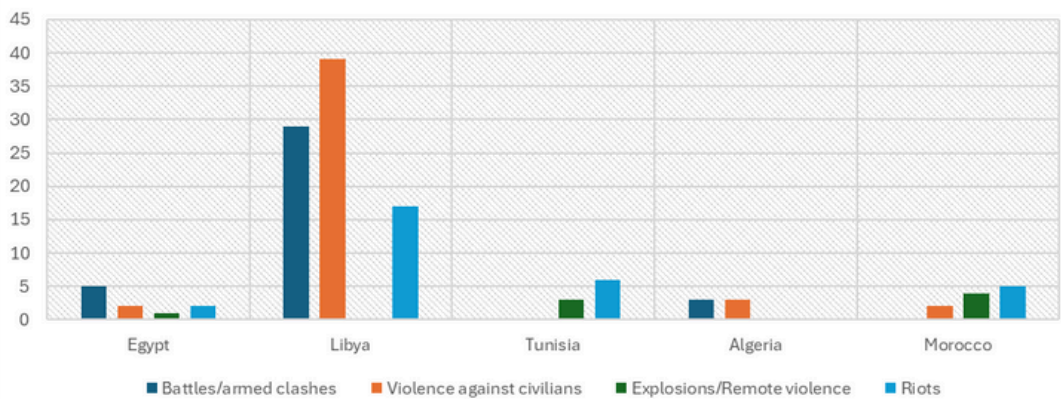
Impact

Instability across North Africa is shaping a cautious operating environment for international stakeholders, including those in the financial and extractive sectors. Tunisia and Egypt’s deepening economic stress raises concern for financial services providers exposed to sovereign risk, currency volatility, or public debt. In Sudan and Libya, armed contestation around resource zones and trade routes continues to challenge extractives and infrastructure actors, with access, security guarantees, and logistics under persistent review.

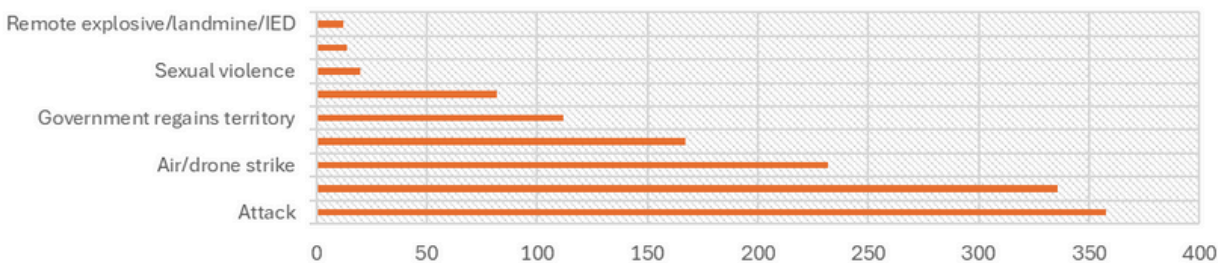
Operational considerations:

- Prolonged unrest in Sudan is likely to further delay foreign and domestic re-engagement in its gold and mineral industries, while significantly increasing risk exposure for logistics hubs and supply corridors in border states.
- Libya’s hydrocarbons sector remains operational, but it is increasingly vulnerable to entrenched political gridlock and recurring localized clashes, particularly around critical export terminals and energy infrastructure nodes.
- Algeria’s persistent concerns over Sahel spillover may prompt a tightening of military posture and surveillance around its southern energy infrastructure corridors, potentially complicating regional supply coordination and transit security.
- Tunisia’s deepening fiscal distress and growing reputational concerns—particularly around migration enforcement—may weigh more heavily on sovereign lending terms, foreign exchange stability, and the broader trade finance outlook.
- Egypt’s complex economic trajectory—anchored in part by strategic Gulf financial support—carries significant implications for the pacing of infrastructure investment and the viability of subsidy-sensitive sectors such as energy and food.
- Morocco’s strategic energy and mining sectors may face moderate disruption from Western Sahara tensions and strained ties with Algeria, potentially affecting cross-border project coordination and investor confidence in contested zones.

Categories of political violence incidents across North Africa: Jan - Mar 2025



Categories of political violence incidents: Sudan [Jan - Mar 2025]



[The selection of countries reflects the United Nations geoscheme for North Africa. Sudan is shown separately due to its significantly higher volume of incidents, which would otherwise distort regional comparisons.]