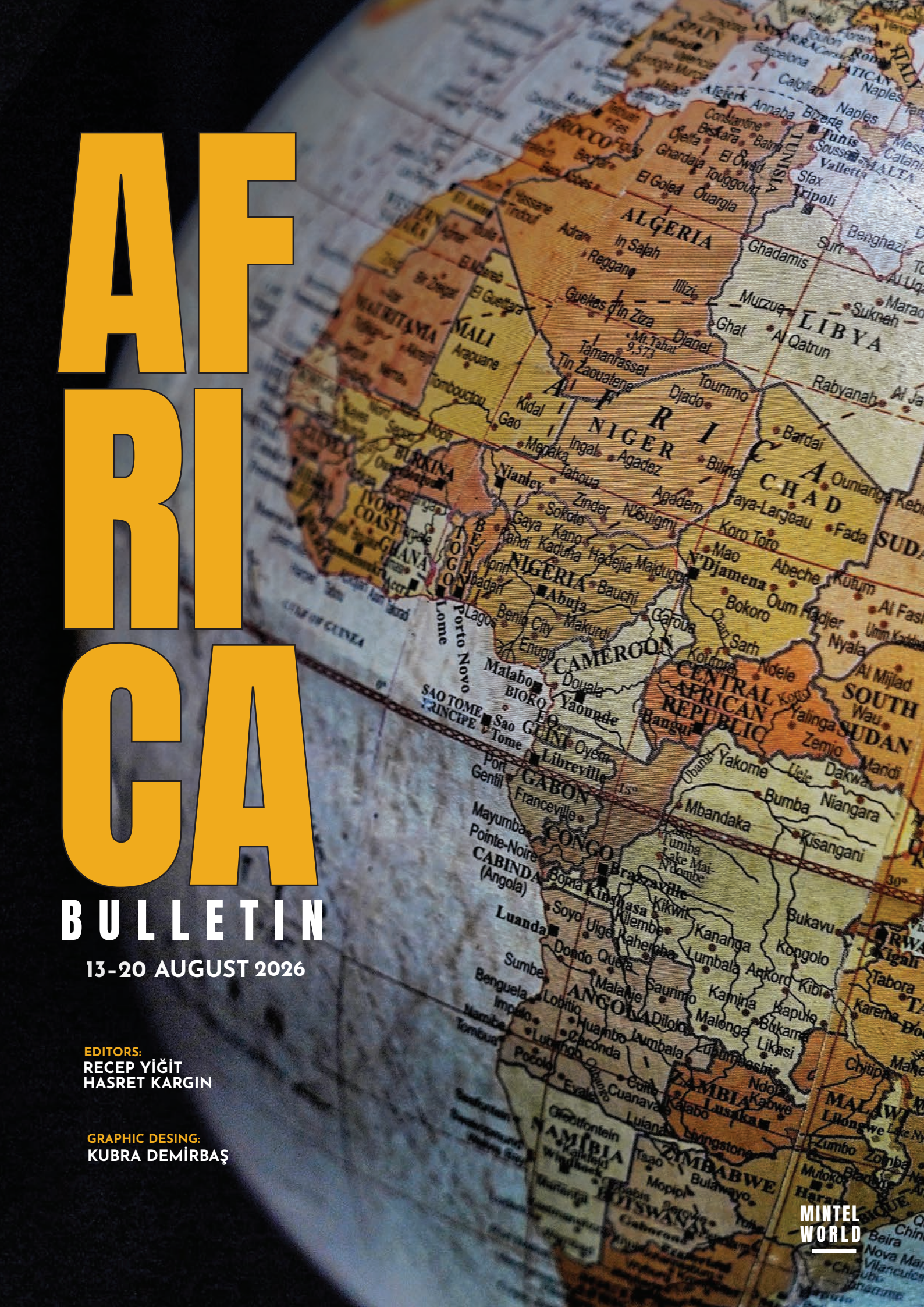


AFRICA

BULLETIN

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EDITORS:
RECEP YİĞİT
HASRET KARGIN

GRAPHIC DESING:
KUBRA DEMİRBAŞ

MINTEL WORLD



EDITOR'S NOTE

Africa is increasingly becoming one of the world's most strategically important regions, yet it remains one of the most underexamined in international media and policy debates. Across the continent, conflicts, political transitions, energy competition, critical mineral projects, and major infrastructure investments are unfolding simultaneously. These developments are no longer regional issues alone; they are directly connected to global supply chains, energy security, migration patterns, maritime security, and the evolving balance of power between major states. As this bulletin demonstrates, events in Africa often have consequences far beyond the continent itself.

A defining feature of today's Africa is the growing overlap between great-power competition and chronic instability. The United States, China, Russia, Türkiye, Gulf states, and European actors are all expanding their political, economic, military, and diplomatic engagement across different regions of the continent. At the same time, civil wars, insurgencies, terrorism, piracy, and governance crises continue to shape local realities. Rather than existing separately, these dynamics increasingly reinforce one another. Strategic competition influences conflict environments, while instability creates new opportunities and risks for external powers seeking influence, resources, or security partnerships.

Our objective is to follow these developments through a comprehensive and data-driven lens. By bringing together security, diplomacy, energy, mining, and political developments in a single publication, we aim to provide readers with a clearer understanding of the forces reshaping Africa. The continent should not be viewed merely as a collection of crises, but as a central arena where the future of global competition, resource security, and geopolitical influence is increasingly being determined.

Levent Kemal

Executive Director, MINTEL WORLD

WEEKLY OVERVIEW

This week exposed a widening gap between diplomatic process and battlefield reality across Africa's conflict zones. In Sudan, the RSF's simultaneous offensives in North Kordofan and Blue Nile pushed El Obeid toward a full siege and brought Kurmuk and Geissan under TASIS control. The same pattern held in the Democratic Republic of the Congo: even as the Washington Agreement's monitoring mechanism advanced at the negotiating table, the FARDC-AFC/M23 front reignited in Kalehe, Fizi and Masisi. Mali illustrated the war's parallel economy — the junta recovered 82 soldiers from JNIM-FLA and pardoned French national Yann Vézilier, even as a UN report showed JNIM had financed an "unprecedented" wave of attacks with a $50 million ransom payment. In Nigeria, the week's violence cut both ways: the massacre in Bin-Per village, Plateau State, killed more than 20 people, while a rare success saw 308 people rescued after six months in captivity near Lake Kainji.

On the energy and mining front, the week showed how instability is reshaping resource flows across the continent. A sixth drone attack on Zawiya pushed Libya's oil sector to the brink of force majeure, while Niger pressed ahead with its own energy ambitions, beginning drilling in the Kafra oil block with Algeria and signing a $1.9 billion Dosso refinery deal with the controversial Zimar Group. In mining, the DRC's copper-cobalt export ban sent cobalt prices soaring fourfold, and the collapse of the Zamboye gold mine in the Central African Republic became the year's deadliest mining disaster, killing more than 100 people. In Zambia, Hakainde Hichilema's re-election secured continuity in copper policy, but the post-election killing of a former minister exposed the political tension beneath that continuity.





CONFLICT AND WAR

SUDAN.

RSF Launches a Two Front Offensive in Kordofan and Blue Nile

On 13 August, the Rapid Support Forces (RSF) attacked the town of Jabrat al-Sheikh in North Kordofan with more than 250 combat vehicles advancing along three axes. The Sudanese Armed Forces (SAF) and allied Joint Forces initially announced that they had repelled the attack. The following day, however, the RSF claimed to have retaken the same town and Umm Girfa. An attack on Umm Arada, southwest of El Obeid, at dawn on 14 August killed at least 18 civilians, while more than 300 families fled to the city. Fighting that broke out again in the area on 18 August killed another dozen civilians and displaced more than 4,200 people. El Obeid itself did not fall, but the RSF is keeping the city under siege from the north, west and south, while the SAF maintains the only supply corridor leading east.

The UN reported that approximately 500,000 people remain under siege and that the risk of a humanitarian catastrophe is growing. On 19–20 August, RSF drone attacks struck El Obeid's main substation, crippling water pumping, hospital and telecommunications systems. Displacement in the Sheikan area has increased by 25 percent over the past eight months.

On the Blue Nile front, TASIS, the Sudan Founding Alliance comprising a coalition of the RSF and SPLM-N, captured three towns within a week. Kurmuk was taken on 13 August, Qeisan on 14 August, and strategic Geissan, near the Ethiopian border, between 17 and 19 August. A Sudanese military source claimed that the attack on Geissan had been "launched from Ethiopian territory". Addis Ababa has not issued an official response to the allegation. Following the attacks during the harvest season, approximately 9,000 people, or 1,787 families, fled Qeisan and surrounding areas between 12 and 17 August. Some crossed into Ethiopia, while at least 12 settlements were evacuated. The SAF and allied Islamist militias deliberately destroyed the Bakuri Bridge in an effort to slow TASIS's advance toward Damazin. The change of control in Kurmuk was not a one-off event. The SAF had retaken the town from the RSF on 8 July, while



the RSF had first captured it in March in an operation during which the Sudanese government accused Ethiopia of providing a training camp and drone runway. It has therefore become a frontline that has changed hands three times.

In Darfur, the RSF launched its largest security mobilization to date in Nyala between 18 and 20 August. The city has been under RSF control since October 2023 and has been declared the headquarters of TASIS's parallel administration. More than 300 combat vehicles were deployed at key intersections, while the SAF launched a new wave of airstrikes against the city on 20 August. In West Darfur, 5,000 people were displaced from 10 villages around Bir Sleiba and Sirba within a week, most of them crossing into Chad. Along the Khartoum-Omdurman-Bahri axis, repeated RSF suicide drone attacks between 12 and 17 August targeted military airfields and electricity infrastructure. The SAF air defence forces said they had shot down most of the drones, but falling debris killed two people in El Obeid. Cracks within the RSF are also growing. On 18–19 August, 318 RSF members, including four commanders, defected to the SAF with 50 combat vehicles. A separate 300-member unit also defected in the same direction.

On the diplomatic front, Sudanese Army Chief Burhan announced a "national dialogue" plan excluding the RSF during the SAF's 72nd anniversary. An African Union delegation visited Khartoum for the first time since the October 2021 coup. During the same week, Sudan and Saudi Arabia signed a Strategic Coordination Council agreement in Riyadh, while the Deputy Commander of the Sudanese Army Headquarters met with Turkey's Ministry of National Defence in Ankara in the context of Bayraktar and Akıncı procurement. The UN Monitoring Team's 38th report, dated 10 August, identified Sudanese-made small arms in ISWAP propaganda, providing a direct link showing that weapons flows from Sudan's civil war extend to the jihadist front in Nigeria.



DRC/ Eastern Congo.

Front Reignites in Kalehe, Fizi and Masisi as the Washington Agreement Advances at the Negotiating Table

In eastern Congo, this week provided the clearest illustration of the widening gap between the diplomatic text and the reality on the ground. In Kalehe, intense fighting that began in Lumbishi on 13 August spread to Katare, Tushunguti, Nyamugari and Kivoka on 17–18 August. Following these clashes, AFC/M23 announced that it had captured the settlements of Ku Kivocat, Katenderi, Tushunguti, Matutira, Mutale and Kashihe, with territorial control shifting in favour of AFC/M23 during the second half of the week. Although Wazalendo militias managed to retake Chambombo and Kazinga, AFC/M23 elements withdrew to the Numbi and Chamirongi hills and regrouped. In Fizi, at midnight on 19 August, a TB2-type drone attributed to AFC/M23 struck the Mwalu Hotel, seriously injuring two people, including the hotel manager. On 20 August, FARDC announced that it had shot down another kamikaze drone in the highlands. In Masisi, renewed bombardments in Musimbira and Nyamiri caused civilian casualties. Fighting between AFC/M23 and Wazalendo around Remeka and Kashovu forced hundreds of families to flee, while an M23 attack in Nkingwe on 19–20 August was repelled toward Malemo. The situation in Walikale was more complicated. Wazalendo forces repelled AFC/M23 in Kazuba and Misambo, while bombardment in Mindjendje, in the opposite direction, struck FARDC and Wazalendo positions. In Iteya, two different Wazalendo groups clashed with each other, making the internal divisions within the resistance front increasingly tangible.

In Ituri, the ADF campaign in the Mambasa area was the front with the highest civilian death toll of the week. According to a report released by APDEF on 13 August, 307 civilians were killed in 48 ADF attacks between 6 May and 13 August, while more than 100 people remain missing. On the night of 15–16 August, at least 13 civilians, some of whom were reportedly slaughtered, were killed in Banana École village. In Bandisende, five people were slaughtered and approximately 50 farmers were taken hostage. A death toll announced by Samuel Kaheni, a local civil society leader in the Bapere sector, points to more than 2,400 civilian deaths since June 2024. Although the figure has not been independently verified, it illustrates the scale of the violence in the region.

On the Washington Agreement front, concrete steps continued to follow one another between 13 and 20 August. The DRC submitted a progress report to SADC on the demilitarization of the FDLR. In Geneva, the DDR plan was presented to the Joint Security Coordination Mechanism. On 17 August, a joint communiqué was issued following the sixth meeting of the Joint



EASTERN DRC CRISIS UNSOLVED

Security Coordination Mechanism, and on the same day the DRC returned the first detainees to M23 under the peace agreement. The United States, France, Belgium and eight partner countries, however, deemed the FDLR protocol insufficient and called for a concrete neutralization timetable. Diplomatic progress and the sound of artillery in Kalehe unfolded side by side during the same week.

Discipline problems within FARDC ranks also came to the fore. In Popokabaka, a soldier was arrested for allegedly killing a civilian with a bayonet. In Lubero, another soldier shot and killed a young man in a bar. In Nyunzu, tensions between FARDC and Wazalendo resulted in the deaths of three people. According to OCHA's World Humanitarian Day statement, 243 incidents affecting humanitarian personnel were recorded in the DRC during the first half of 2026, six aid workers were killed, and more than 200 drone incidents were recorded during the same period. Drones are now being defined as a new category of humanitarian threat in eastern Congo.

NIGERIA.



Bloody Week in Plateau, Historic Rescue at Lake Kainji

Plateau State was Nigeria's deadliest security front throughout the week. On 18 August, beginning around midnight in Bin-Per village in the Mangu area, heavily armed attackers went from house to house, killing residents as they slept. The death toll was revised upward from 20 in initial reports to 25, with most of the victims being women and children. According to Zagazola Makama, the attack was a reprisal by "suspected Fulani militias" that had infiltrated from the Bokkos axis following an earlier attack. Major General Maxwell Dangana, Commander of the 3rd Division, moved his headquarters from Jos to Mangu and launched "Operation Hard Knot". On 20 August, police arrested a suspected mastermind. This was not an isolated incident. On 16 August, 45 Fulani shelters were burned in Jwak Maitumbi, while similar cycles of attacks and security-force responses were repeated throughout the week in Nyerwai, Bassa, Gana Ropp, Manja, Ariri and Langtang North. Farmer-herder violence is no longer a series of isolated incidents but has become a daily security routine.

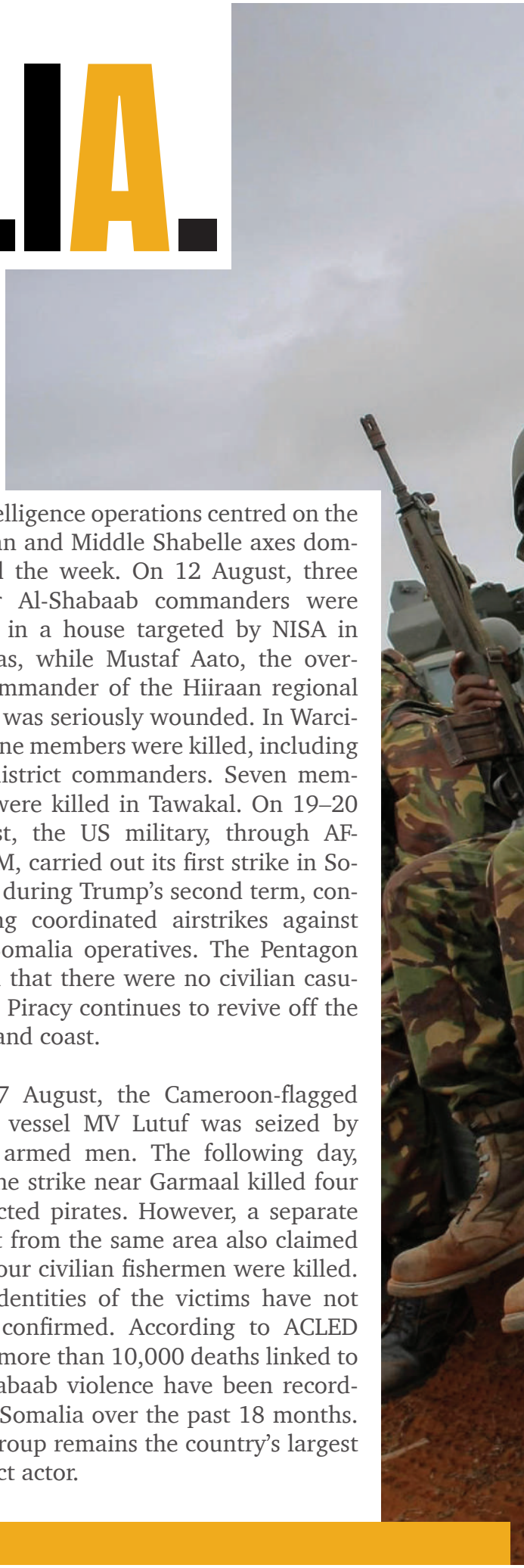
In Borno, ISWAP launched two major attacks on military bases. On 15 August, the 162 Amphibious Battalion repelled an assault in Mandaragirau. A similar attempt in Gajiram at midnight on 10 August was

again stopped by troops holding the position. In a separate ambush on 6 August between Yamtake and Bitta, four soldiers were killed. The series of ambushes between 6 and 8 August was reportedly responsible for the deaths of 14 soldiers in total. The Nigerian Air Force responded. On 8 August, the commander responsible for VIP protection within ISWAP and eight fighters were killed in the Sambisa Forest. On 18 August, another eight fighters were neutralized in the Timbuktu Triangle. Internal divisions within ISWAP are also growing. Following the theft of 40 million naira, the group seized Boko Haram's JAS position in Gazwa and executed four members of its own Shura Council amid a leadership crisis. Competition within the jihadist front is following a pattern similar to the JNIM-ISSP clashes in Burkina Faso in the Sahel.

The Sokoto-Kebbi-Zamfara triangle experienced a bloody week of banditry. On 15–16 August, during Friday prayers in Ungushi village, bandits affiliated with Lakurawa killed at least 28 civilians, including the local imam. On 10 August, police confronted a bandit group in Rafin Makuku, but the clash resulted in the deaths of 10 police officers and two civilians. Security forces also achieved several successes in response. On 18 August, 14 victims were rescued in Madaci Forest in Katsina. On 19 August, a 40-member gang was intercepted in Gidan Bawa village and 24 bandits were killed. The most striking development of the week, however, came from Kwara and Niger states. In February 2026, 308 people were taken to a clandestine camp in Kainji Lake National Park, including 163 people from Woro and Nuku villages in Kwara and 145 from Niger State. They were rescued in mid-August after approximately six months in captivity in what was announced as the "largest single-day rescue operation" in Nigerian history. At least 13 people died during the captivity, while 12 children were reportedly still being held by their abductors.



SOMALIA.



Federal Army Repels Militias in Baidoa as Piracy Resurgence Continues

Before dawn on 17 August, militias loyal to Abdiaziz Hassan Mohamed Laftagareen, the former President of South West State who was removed from office in March 2026, entered Baidoa from two directions and engaged in hours of fighting with two battalions of the federal army. The federal army announced on 18 August that it had driven the militias out of the city. According to the Ministry of Defence, at least 30 attackers were killed. A hospital official reported that four civilians were killed and 98 people were wounded. The city remained under federal control, although the Laftagareen camp continued to claim that it had partially captured the city. On 19–20 August, the South West administration announced that it had carried out overnight strikes against three Al-Shabaab bases approximately 30 kilometres outside Baidoa. The aftermath of the fighting continued. A series of intelligence operations centred on the Hiiraan and Middle Shabelle axes dominated the week. On 12 August, three senior Al-Shabaab commanders were killed in a house targeted by NISA in Maxaas, while Mustaf Aato, the overall commander of the Hiiraan regional front, was seriously wounded. In Warcise, nine members were killed, including two district commanders. Seven members were killed in Tawakal. On 19–20 August, the US military, through AFRICOM, carried out its first strike in Somalia during Trump's second term, conducting coordinated airstrikes against ISIS-Somalia operatives. The Pentagon stated that there were no civilian casualties. Piracy continues to revive off the Puntland coast.

On 17 August, the Cameroon-flagged cargo vessel MV Lutuf was seized by eight armed men. The following day, a drone strike near Garmaal killed four suspected pirates. However, a separate report from the same area also claimed that four civilian fishermen were killed. The identities of the victims have not been confirmed. According to ACLED data, more than 10,000 deaths linked to Al-Shabaab violence have been recorded in Somalia over the past 18 months. The group remains the country's largest conflict actor.



SAHEL.

Federal Army Repels Militias in Baidoa as Piracy Resurgence Continues

On 13 August, the Malian General Staff announced the release of 82 FAMa soldiers held by the JNIM-FLA coalition. The soldiers were received by Goïta in Bamako on 18 August. On the same day, French DGSE agent Yann Christian Bernard Vézilier, who had been sentenced to 20 years in prison last year for attempting to overthrow the government, was also released under a presidential pardon. The official statement did not directly describe the release as part of an exchange. The government only referred to the "secret mediation of a brotherly country", while a military source said Morocco had played a role. The fact that both releases took place on the same day strongly implies a connection between the two cases.

A report released by the UN Monitoring Team during the same week placed this development in a darker context. It stated that a $50 million ransom paid at the end of 2025 in exchange for the kidnapping of a member of a Gulf royal family had financed JNIM's "unprecedented" wave of attacks in Mali. The funds were reportedly distributed among JNIM-affiliated katibas across the Sahel, and the 9 August attack on the San military barracks may have been linked to these resources. In San, JNIM militants approached the barracks on motorcycles while wearing Malian army uniforms and temporarily occupied the facility. The number of soldiers killed was reported as 10 by Jeune Afrique, while other accounts put the figure at 12.

FAMa's Opération Dougoukoloko carried out dozens of airstrikes throughout the week in Boulkessi, Kidal, Tessalit, Sikasso, Andéramboukane, Ségou and Koulikoro. In contrast, an Amnesty International report published in August concerning an incident that occurred in Gao on 18 July documented the mass execution of at least 19 FAMa soldiers who had surrendered and described the incident as a war crime.



French DGSE agent- Yann Christian Bernard Vézilier



NIGER.

In Burkina Faso, JNIM targeted Tawori, Fada N'Gourma, Taouri and numerous VDP (Volunteers for the Defence of the Homeland) positions throughout the week. An attack on 19 August, in which dozens of soldiers and VDP fighters were reportedly killed, was described as the week's single largest loss of life. In the three-border area of Mali, Niger and Burkina Faso, JNIM carried out a targeted attack against the Islamic State Sahel Province (ISSP) on 17 August. The group announced that it had killed Abou Zeid Al-Burkinabi, described as the emir of ISSP in Burkina Faso, marking another episode in the continuing territorial and resource competition between the two jihadist organizations.

MPLJ Attack, Release of US Missionary-Pilot Kevin Rideout and JNIM Expansion in Burkina Faso

On 14–15 August, the Bazoum-aligned rebel movement MPLJ launched a dawn attack on joint security positions in Séguédine, in the far north of the country, and claimed to have killed 15 soldiers. A Nigerien security source confirmed only that there had been "several deaths and damage", while no definitive casualty figure was released. During the same week, American missionary-pilot Kevin Rideout, who had been abducted in Niamey on 21 October 2025, was released after nine months in captivity. According to an exclusive Reuters report based on five sources, forces affiliated with Khalifa Haftar in Libya played a key role in the process. Four of the sources said that an agreement had been reached, while one said that a ransom had been paid. A Haftar-affiliated source, however, claimed that they had been carrying out a military operation in Mali. The contradictions between the different accounts remain unresolved.



American missionary-pilot - Kevin Rideout


POLICE

LIBYA.

Turkish Foreign Minister was in Libya. As part of Turkey's peace efforts, he held talks with both sides.

Since 9 August, drone attacks targeting the refinery, fuel depots, power plant and substations in Zawiya increased to six during the week. One attack set fire to a fuel storage tank with a capacity of 4.5 million litres. The NOC warned that further attacks could force the refinery to declare force majeure. It remained unclear who was behind the attacks. RUSI analyst Jalel Harchaoui attributed them to tensions between the Tripoli government and militia leader Mohamed Bahroun, who controls Zawiya.

On 10 August in Benghazi, LNA military intelligence chief Brigadier General Fawzi Al-Mansouri was killed by an IED after leaving a mosque. More than a week later, no arrests had been made. This deterioration in the security environment also affected the process surrounding the release of US hostage Kevin Rideout. According to Reuters, forces affiliated with Haftar took the hostage from the Malian border and escorted him to Benghazi, where he thanked the Libyan forces. See the Sahel section on Mali and Niger.

During the same week, Turkish Foreign Minister Hakan Fidan was received at Haftar's family compound in Benghazi, marking the first visit at this level by a Turkish diplomat in more than a decade. He subsequently met Prime Minister Dbeibah and the Libyan Presidential Council in Tripoli. The visit was presented as a concrete manifestation of Ankara's "One Libya" policy. See the Diplomacy section. The energy crisis originating in Zawiya developed into power cuts, GE suspending its work at the Zawiya power plant, and protests in Tripoli calling for the government's resignation.





AFRICA

Other



Post-Election Death in Zambia, Multi-Front Tensions in Ethiopia and the Shadow of the Mining Disaster in CAR

In Zambia, Hakainde Hichilema was re-elected on 13 August with 60 percent of the vote. The following day, a joint security task force raided the home of opposition leader Brian Mundubile. Former Transport Minister and Member of Parliament Mutotwe Kafwaya was shot and killed in the crossfire. Police announced that they had arrested 11 people on accusations of planning a coup attempt. Amnesty International described the death as "deeply alarming" and called for an independent investigation. See the Diplomacy and Mining sections.



Hakainde Hichilema

In Ethiopia, more than 20 army personnel were reportedly killed in an attack by Fano militias in the Amhara region, according to a single source. The Oromo Liberation Army captured prisoners in a separate attack. Fano leader Zemene Kassie announced that different regional militias had united under a single command against the government of Abiy Ahmed. In Tigray, the TPLF claimed that the Ethiopian army had carried out a drone strike near Mekelle.

In the Central African Republic, the collapse of the Zamboye gold mine on 18 August, discussed in the Mining section, became the deadliest incident of the year with more than 100 deaths. Opposition leader Martin Ziguélé criticized the lack of state oversight and called for a parliamentary investigation.

In Mozambique, a report following UN Special Rapporteur Ben Saul's visit to Cabo Delgado concluded that a military victory does not appear imminent and that attacks against civilians have increased over the past year.

In South Sudan, a cattle raid in Tonj North County in Warrap State escalated into a wider conflict, leaving at least 50–60 people dead.

In Côte d'Ivoire, seven people were killed and 18 arrested following intercommunal clashes in Kossandji village in the southern part of the country. The incident occurred on 4 August but was reported in mid-August.

In Tanzania, an appeals court upheld the death sentences of six defendants in the case concerning the 2023 bombing of the Arusha Burka Catholic Church, which killed three people.

In Chad, in addition to the pardon of Succès Masra, discussed in the Diplomacy section, the Chad-France military partnership, which was severed in November 2024, was reportedly quietly revived.

In Cameroon, 93-year-old President Biya reshuffled army commanders during a two-month absence abroad. The commander of the Republican Guard was promoted. The changes were seen as an indication of the uncertainty that the prolonged leadership absence has created within the security establishment.

Table: Key Security Operations of the Week

Country/Region	Operation/Event	Date	Casualties/Outcome
Nigeria (Kwara/Niger State)	Kainji Lake kidnapping rescue operation	Mid-August	308 people rescued, at least 13 died in captivity
Nigeria (Plateau, Bin-Per)	Night raid	18 August	20–25 civilians killed
Sudan (El Obeid/Umm Arada)	RSF siege and attacks	13–20 August	500,000 people under siege, 30+ civilians killed
DRC (Ituri/Mambasa)	ADF wave of attacks	6 May–13 August	307 civilians killed, according to APDEF report
CAR (Zamboye)	Gold mine collapse	18 August	107+ killed
Mali (San)	JNIM attack on military barracks	9 August	10–12 soldiers killed
Somalia (Baidoa)	Laftagareen militias–federal army clashes	17–18 August	30 attackers + 4 civilians killed, 98 wounded
Nigeria (Katsina/Sokoto/Zamfara)	Counter-bandit operations	15–19 August	28 civilians killed in Ungushi, 24 bandits killed in Gidan Bawa


DIPLO
MACY

MALI.

Release Diplomacy and the Moscow Channel

Mali's most visible diplomatic moves during the week came with the release of 82 soldiers and the pardon of Yann Vézilier. See the Conflict section. The pardon fuelled speculation about a possible rapprochement between Bamako and Paris, while similar expectations of a pardon were also raised for detained activist Adama Diarra, known as "Ben le Cerveau". On 19 August, a phone call between Goïta and Putin confirmed the continuation of Russia-Mali coordination for stability in the Sahel. UN Assistant Secretary-General Haoliang Xu also visited Bamako during the same week and discussed security as well as UNDP support for health and ecological initiatives. Russia also positioned itself as a "bridge" between ECOWAS and the AES, a role that carries the risk of an escalating influence game. In Chad, opposition leader Succès Masra was released under a presidential pardon after one year in detention and "secret negotiations" with President Déby, a move interpreted as a gesture toward reconciliation.

NIGER.

Oil Diplomacy and the Release of the American Hostage

In addition to beginning drilling in the Kafra oil block with Algeria, Niger accepted the credentials of the new Nigerian ambassador on 20 August and held talks with the United States at the Ministry of Petroleum. It also signed a memorandum of understanding with UNDP and the National Institute for Diplomatic and Strategic Studies to strengthen institutional capacity. The release of American missionary Kevin Rideout, who had been abducted in Niamey, was presented as an indication of the Trump administration's renewed engagement with the Sahel juntas. Trump himself confirmed the release. See the Conflict and Libya sections. President Tiani responded to Tinubu's statement linking the deterioration of security in AES countries to the rise in terrorism in Nigeria by describing it as "simplistic and surprising". The AES bloc adopted a common diplomatic position in Ouagadougou.



DRC/ Rwanda.

Paper Progress on the Washington Agreement and Search for Regional Support at the SADC Summit

The monitoring mechanism of the Washington Agreement advanced through a series of meetings and communiqués throughout the week. See the Conflict section for comparison with the realities on the ground. On 13 August, the DRC reported progress on the FDLR to SADC.

On 14 August, two new monitoring initiatives were approved. On 15 August, the DDR plan was presented in Geneva. On 17 August, the communiqué of the sixth meeting of the Joint Security Coordination Mechanism was released, and the DRC returned the first detainees to M23.

At the 46th SADC Summit in Durban, the DRC paid its outstanding membership arrears and regained full speaking rights. Tshisekedi was represented by Guy Kabombo. Ramaphosa called for stronger solidarity over Ebola and for a ceasefire. During the same week, Tshisekedi also visited Gabon, where three agreements and a visa-waiver arrangement were signed, and Tanzania, where discussions focused on transport and regional relations, including the Kalemie-Manono road connection. In Washington, 54 Democratic members of the US Congress criticized the Trump administration over a lack of transparency in the DRC mining agreements and expressed concerns with reference to the Dan Gertler case. See the Mining section. Former President Joseph Kabila also responded to the sanctions imposed on him by the US Treasury Department.



SOMALIA.

The week revolved around President Hassan Sheikh Mohamud's tour of Galmudug and Gaalkacyo. The Puntland administration placed its security forces on alert in response to the visit, while Puntland leader Deni also visited the city around the same time and tightened control. Despite this, Mohamud proceeded with his visit, including a visit to a technical school, and travelled to Bandiradley, where he called for "unity". On 20 August, Mohamud was reported to have visited southern Gaalkacyo while Puntland prevented access to the rest of the city, marking the peak of tensions during the week. The 15th anniversary of Somalia-Türkiye relations was celebrated. Prime Minister Barre called for a deeper economic partnership, while the election of the new Speaker of the Federal Parliament was interpreted as an indication of Ankara's highest-level influence in Mogadishu. Egypt reiterated its support for Somali sovereignty and AUSSOM. Parliamentary ties with Saudi Arabia deepened. Uganda announced that it would keep its troops in Somalia despite uncertainty over AUSSOM funding, while Mohamud was separately reported to have called for the AU peacekeeping force to "leave". Two contradictory narratives regarding AUSSOM therefore emerged during the same week. The UN began preparing for a possible mission closure in Somalia and put its assets up for sale, increasing concerns over a potential security vacuum. UNSOS is seeking an auctioneer to dispose of $30 million worth of UN equipment. On the Somaliland front, relations following recognition became more concrete. Israeli and Somaliland representatives met in the UAE to deepen economic ties. The recognition has created a diplomatic dilemma for both sides. President Cirro also held talks with international representatives in Nairobi on security and development and discussed investment. Somaliland also held talks with AFRICOM on maritime security and defence cooperation. Mogadishu's bilateral diplomatic traffic intensified throughout the week. Economic partnership and new investment were discussed with Qatar. Pakistan increased its diplomatic efforts to secure the release of 10 crew members held by pirates since April and also held talks on rebuilding the Somali Air Force. Norway pledged stronger diplomatic ties in Mogadishu. The Indian ambassador took up his post. An agreement on seafood with China raised concerns over maritime exploitation ahead of duty-free trade. A US court cleared the way for the Trump administration to terminate Temporary Protected Status for approximately 1,100 Somalis, with hundreds of Somali nationals expected to face deportation. In Mogadishu, journalist Mascuud Warsame, who had been held unlawfully for 40 days, was released.



SUDAN.
South Sudan.

African Union Returns to Khartoum, Kiir Offers Mediation

An African Union delegation visited Khartoum and held its first official meetings there since the October 2021 coup. Sudan described the visit as “historic”. During the same week, however, the EU Council was also reported to have “bypassed” Burhan’s political initiative, sending a contradictory signal.

Sudan and Saudi Arabia signed an agreement to establish a High Council for Strategic Cooperation. RSF leader Dagalo met with South Sudanese President Kiir, who subsequently offered to mediate in the Sudan conflict, marking Juba’s attempt to assume a mediation role in the war. The United States signalled preparations to return to mediation over the Grand Ethiopian Renaissance Dam dispute while the Nile disagreement continues. This indicates Washington’s willingness to re-engage in a dispute that has remained unresolved between Egypt and Ethiopia for years. Sudan also discussed Japan-financed reconstruction projects through its ambassador in Tokyo. The Chinese Embassy said bilateral relations were ready for “broad prosperity”, while a Chinese company expressed interest in energy projects for the electricity grid damaged by the war. See the Energy section. Media cooperation with Egypt also strengthened.

In South Sudan, the election timetable was reported to have fallen behind schedule, while a UN Commission warned that “sham elections” could fuel conflict. Legal proceedings against Riek Machar continued. In a separate development, Juba rejected a UN report on Sudan as “false and one-sided” and also denied claims that its Nairobi embassy had been closed because of unpaid rent.



LIBYA.

Fidan's Benghazi Visit, US Unification Efforts and Revision of the UN Roadmap



Turkish Foreign Minister Hakan Fidan was received by Haftar in Benghazi, marking the first such visit at this level in more than a decade. Fidan presented the visit as a concrete manifestation of Türkiye's "One Libya" policy. The visit reportedly unsettled Israel and put pressure on a US plan based on coordination between Egypt and Türkiye. US Deputy Permanent Representative to the UN Locetta welcomed the conclusion of UNSMIL's Structured Dialogue. Following the continuation of the high-level talks held in Malta in July, a visit by a US congressional delegation was followed by reports that Libyan military leaders had committed to establishing a Joint Operations Center. UNSMIL Special Representative Tetteh announced that the political roadmap could be revised if necessary, while Guterres called for institutional unification and economic reform in a report submitted to the UN Security Council. The EU imposed sanctions on three companies for violating the arms embargo, while Egypt and Libya moved closer to an agreement worth approximately $1 billion on an oil pipeline. See the Energy section.

NIGERIA_



Strengthening Defence Ties with Washington, 2027 Election Peace Pact and Coup Allegation

Nigeria strengthened its defence and security partnership with the United States during talks in Washington. The two countries also separately discussed the protection of Christian communities. The Trump administration is reviewing whether to once again designate Nigeria as a “country of particular concern” over alleged “Christian genocide”. During the same week, Nigeria signed agreements with China on film and content exchanges as well as agricultural and export cooperation. It was also announced that Tinubu would address the UN General Assembly on 23 September. In domestic politics, Tinubu, Peter Obi, Sowore and other candidates signed a peace pact ahead of the 2027 campaign, committing themselves to opposing violence and hate speech. In the Osun State gubernatorial election, Adeleke was re-elected, although allegations of violence and vote buying came under scrutiny from EU and UK observer missions. An allegation that an officer known as Colonel “Ma’aji” was planning a coup against Tinubu was presented on the grounds of “patriotism”, but it remained only an allegation and no court proceedings were initiated. At the regional level, Ghana and Burkina Faso signed a defence agreement aimed at protecting major trade corridors. A Ghana-Sierra Leone pact covering trade, energy, mining and security, as well as Canada’s first permanent embassy in Cotonou, also took concrete shape during the same week.

The week’s most important multilateral point of tension was the United States imposing sanctions on International Criminal Court President Tomoko Akane. It was subsequently reported that two more ICC officials had also been sanctioned. The ICC strongly condemned the measures, raising questions about their potential impact on the balance of power among African states, signalling the possibility of growing polarization in relations between African states and the ICC.

Continent-Wide.

ICC-US Sanctions Crisis, UN Secretary-General Race and Early Election Maneuvering in Kenya



International Criminal Court President Tomoko Akane

In the UN Secretary-General race, the candidacy of former Senegalese President Macky Sall weakened after the first round of voting. The Zambian election remained on the agenda throughout the week. The opposition challenged the results in court, and there were unverified, single-source suggestions that the election may have been flawed and could need to be rerun.

In Kenya, preparations for the 2027 election began early. Opposition leaders Gachagua, Kalonzo and Karua held talks. Gachagua appealed to the Court of Appeal seeking to overturn his impeachment, while the IEBC opened tenders for election technology.

At the SADC Summit in Durban, anti-immigrant protesters held a march, and a South African diplomat apologized for xenophobia. In Togo, President Gnassingbé restructured the senior military command. Guinea-Bissau's new leadership made its first foreign visit to Chad.

Ethiopia's ambassador to Somalia accused Eritrea of violating Ethiopia's sovereignty. During the same week, an analysis was published arguing that the Pretoria Agreement was weakening in Tigray, with the TPLF remaining central to the issue. See the Conflict section. This should be monitored as a potential third line of tension in the Horn of Africa.

Business leaders from Ghana and the United States are due to meet at a global summit. In Liberia, the Indian ambassador emphasized growing bilateral cooperation, while the United States continued deporting migrants to Liberia, with 1,200 Liberians reportedly affected. In The Gambia, a new party manifesto was unveiled ahead of the December election. Smaller-scale diplomatic activity across the continent continued uninterrupted throughout the week despite being overshadowed by the major crises.

ENERGY

AES:

First Joint Meeting of Energy and Mining Ministers, “Energy Sovereignty in the Sahel” Agenda

The first joint meeting of the Energy, Mining, Quarries and Petroleum Ministers of the Alliance of Sahel States Confederation, comprising Mali, Niger and Burkina Faso, was held in Ouagadougou. The three countries aim to turn their natural resources into a driving force for industrialization and development.

The practical manifestation of this institutionalization became visible in Burkina Faso. The new thermal power plant in the city of Kaya officially began production, reaching a capacity of 25 MW, ten times that of the old plant. It was built with 28 engines at a cost of 15 billion CFA francs.

The SAMAO-SEMH/AES 2026 dual event, consisting of West Africa Mining Activities Week and AES Energy and Mining Week, will be held in Ouagadougou from 14–19 September. According to the chairman of the organizing committee, it “will not be just another forum” and will reflect the Sahel states’ determination to regain control over their natural resources.

Drilling resumed on 12–13 August at the Kafra Sud-Est 1 oil block in Agadez. Estimated reserves stand at 260 million barrels. A 2,000-horsepower drilling rig was transported from Algeria across the Sahara.

During the same week, Sonidep and Sonatrach completed the sale of one million barrels of Nigerien crude oil, known as “Meleck”, from the Sèmè terminal in Cotonou, Benin. Sonatrach also made its first shipment of Jet A1 kerosene from the Adrar refinery to Niger. This marked the first pilot operation involving Sonidep’s direct crude oil trading.





NIGER:

Kafra Drilling, Sonatrach Oil Swap and Controversial Zimar Agreement

During a meeting on 18 August between Niger's Ministry of Petroleum and the US Chargé d'Affaires, concrete figures were presented. One oil block is currently in production and nine are at the exploration stage. The government's target is to increase daily production to one million barrels. The local content ratio is planned to rise from 6 percent to 20 percent in 2026 and to 40 percent by 2030.

The Algerian ambassador also referred to a proposed gas pipeline project connecting Niger to Algeria. On 9 August, Algeria donated four military helicopters to the Nigerien army, indicating that the security of the emerging energy corridor is increasingly tied to diplomatic and military support.
The drone attack campaign in Zawiya (see the Conflict section) has turned directly into an energy crisis. General Electric suspended its work at the Zawiya power plant and withdrew its technical teams. On 16 August, an explosion near the plant caused widespread power outages across Tripoli and western Libya. Combined with the outages caused by faults on 18 July, total losses over the summer reached 1,350 MW.

Despite this, Libya's oil recovery continues. In June, crude oil and condensate production reached 1.48 million barrels per day, the highest level since 2013. The NOC signed its first production-sharing agreements in nearly 20 years with Repsol, TPAO, Eni, QatarEnergy and MOL Group. Between January and June 2026, Libya generated $15.2 billion in foreign-exchange revenue from oil exports, 8.9 percent above target. However, the IMF warned that Libya's 2025 fiscal deficit reached approximately 30 percent of GDP and public debt reached 146 percent of GDP, stressing that the temporary surplus in oil revenues should be accumulated.

LIBYA:

Zawiya-Driven Crisis Deepens, Production Record at Risk, Egypt Pipeline Talks



Cairo and Tripoli are actively discussing an 800-kilometre crude oil pipeline between Tobruk and Alexandria. The official preliminary cost is above $1 billion, while analysts estimate the cost at between $1.3 billion and $2.2 billion. However, because Tobruk falls within Haftar's political and security sphere, the project risks becoming an instrument of Libya's divided politics. The most realistic timeline points to 2029–2030.

President Tinubu's "Deep Offshore Oil and Gas Projects Incentives" decree, signed on 11 August, could allow greenfield deep offshore projects to begin with a 70 percent contractor and 30 percent government profit-oil sharing ratio. The key target project, Bonga Southwest Aparo, could attract $20 billion in foreign investment according to NNPC. According to NUPRC, the framework could unlock $50 billion in investment and an additional 1 million barrels per day of production over the next four to five years.

Offshore investment is targeted at $30–50 billion in total by 2030, while gas production is expected to reach 12 billion cubic feet per day and oil production 3 million barrels per day by 2030.

Dangote Refinery supplied approximately 20 percent of Europe's jet fuel imports in July alone, shipping more than 400,000 tonnes and making Nigeria Europe's leading aviation fuel supplier, overtaking the United States. The refinery is also preparing for an IPO following a financing round of approximately $1 billion. The IPO is expected to be worth $5 billion, with a valuation estimated at $40–50 billion.

NIGERIA:

Offshore Tax Incentives, Dangote's European Market Share and the Race Between Two Gas Pipelines

At the regional level, competition intensified between the Trans-Saharan Gas Pipeline, linking Algeria, Niger and Nigeria, and the African Atlantic Gas Pipeline. The Trans-Saharan project is 4,200 kilometres long and construction began on 4 June, giving it a structural advantage through its connection to the existing European network. The African Atlantic Gas Pipeline covers 13 coastal countries and stretches 6,900 kilometres. An intergovernmental agreement was signed on 19 July, although Morocco and Mauritania have not yet joined.

NNPC maintains that the two projects are not mutually exclusive. However, financial expert Dan Kunle's open letter argued that it is premature to debate gas pipelines of this scale when Nigeria itself cannot yet supply sufficient gas to its own power and industrial sectors.

According to current data confirmed through web verification, the East African Crude Oil Pipeline (EACOP) had reached approximately 91 percent completion by mid-August, with first oil targeted before the end of the year.

On 6 August in Dar es Salaam, TPDC, Vitol Bahrain and UNOC signed a memorandum of understanding to develop refining, storage and distribution infrastructure at the Port of Tanga. The project aims to reduce Uganda's approximately $2 billion annual refined-product import bill and establish an Indian Ocean route that bypasses the Mombasa/Kenya corridor, through which more than 90 percent of Uganda's imports currently pass.

Vitol's role is expanding. It is Uganda's exclusive petroleum-products supplier and has a $2 billion agreement with UNOC. In March, it acquired a 20.15 percent stake in Kenya Pipeline Company. However, there are audit concerns that many of its contracts were awarded without competitive tendering.

Kampala secured $250 million from the World Bank for the Uganda-Tanzania high-voltage transmission line, which will enable electricity trading between East and Southern Africa.

Uganda-Tanzania:

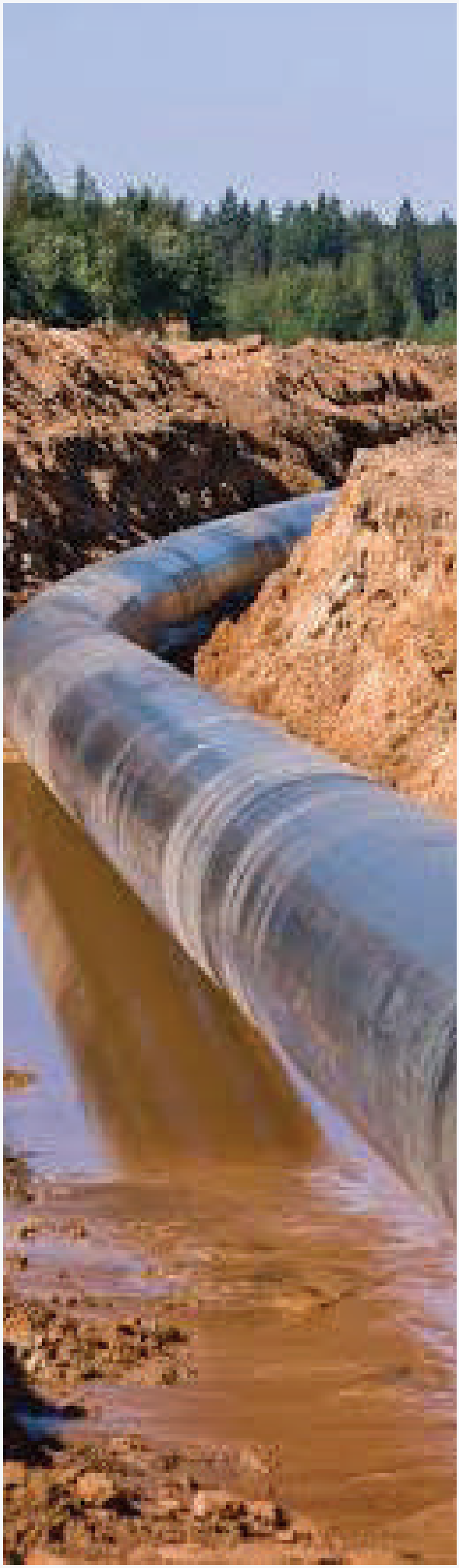
EACOP Reaches 91 Percent Completion, Tanga Hub Bypasses the Kenya Corridor

On 14 August, the Constitutional Court issued a ruling permanently preventing Shell and Impact Africa from conducting exploration activities off the Wild Coast, bringing a five-year legal battle to an end. The African Energy Chamber criticized the decision as an example of a “legal warfare model” used by Western-funded NGOs against African oil and gas projects.

The gas-to-power tender that closed on 29 May received bids totaling 2,800 MW against a target of 2,000 MW, marking the first oversubscribed tender since December 2023. Preferred bidders are expected to be announced at the end of August.

However, grid bottlenecks remain a major constraint. The government plans to add 105 GW of capacity by 2039, requiring 14,500 kilometres of additional transmission lines over the next decade. The current construction rate is only around 200 kilometres per year. During a visit to Beijing, Minister Ramokgopa announced that six Chinese companies had agreed to establish factories for transformer and pylon production.

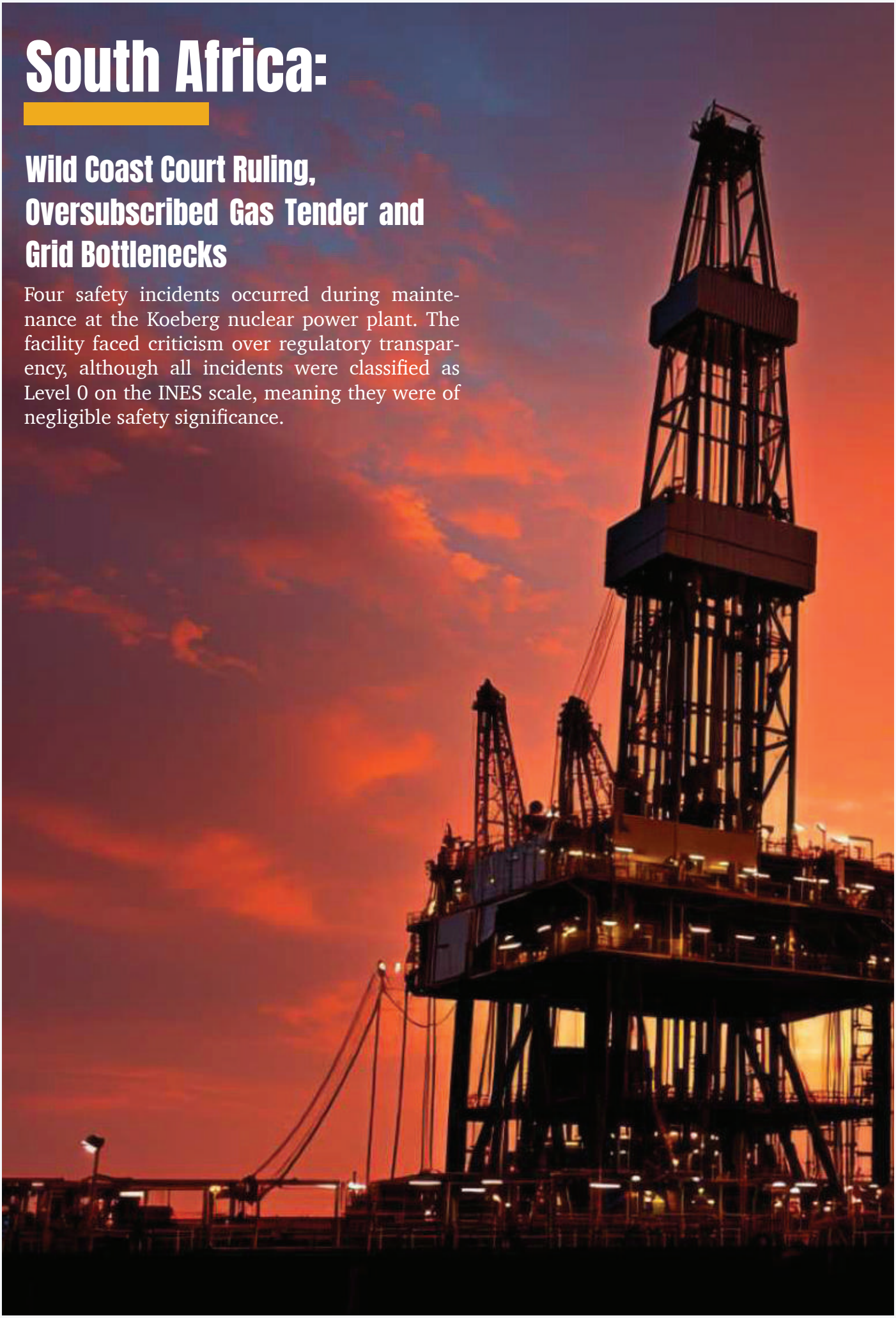
On 21 August, the largest electricity-pricing reform in 20 years is expected to be published in the Government Gazette. The reform provides for a 10-year pricing outlook and supplier selection mechanisms.



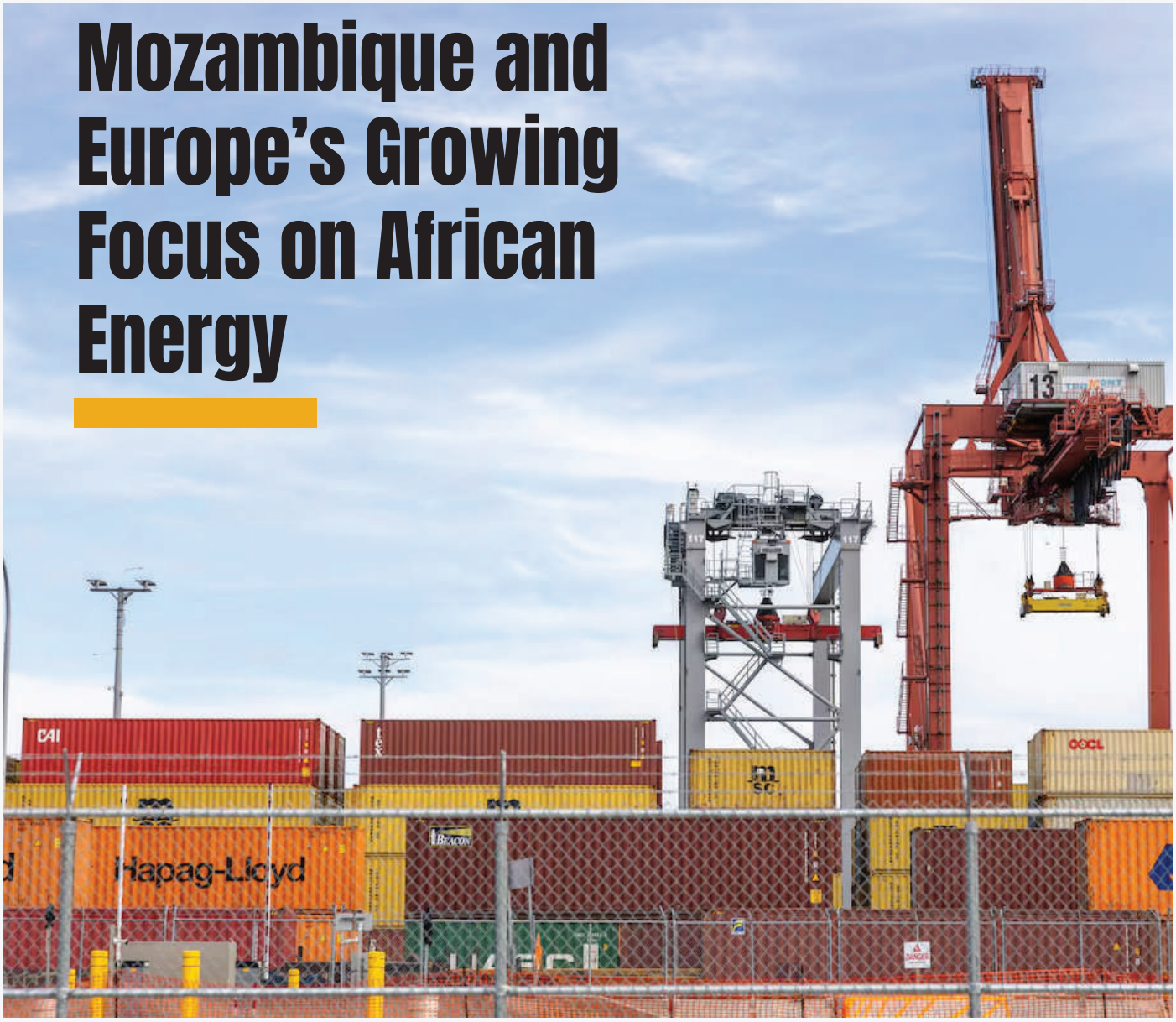
South Africa:

Wild Coast Court Ruling, Oversubscribed Gas Tender and Grid Bottlenecks

Four safety incidents occurred during maintenance at the Koeberg nuclear power plant. The facility faced criticism over regulatory transparency, although all incidents were classified as Level 0 on the INES scale, meaning they were of negligible safety significance.



Mozambique and Europe's Growing Focus on African Energy



ExxonMobil signed a $1.1 billion pre-investment contract for the first phase of the Rovuma LNG project. Final investment decision is expected in 2026, with projected government revenues of $150 billion over the project's lifetime.

The Mphanda Nkuwa hydropower project, meanwhile, has been delayed to 2034 and its estimated cost has risen to $6–7 billion.

At the continental level, a broader strategic framework is becoming clearer. Rising tensions with Russia and uncertainty surrounding the US partnership are pushing the EU toward Africa's oil, gas and uranium resources. Russia's share of EU gas imports fell from 45 percent in 2021 to 13 percent by the end of 2025. Algeria remains the EU's largest African gas supplier.

Before the coup, Niger supplied more than a quarter of the EU's nuclear uranium requirements. That supply relationship has now become part of a wider geopolitical competition as Russia's influence in the Sahel expands.

Across Nigeria, Angola, Namibia, Senegal, Egypt and Morocco, dozens of renewable-energy, wind, solar and green-hydrogen projects advanced during the week. In Namibia, Africa's first fully integrated green-hydrogen facility became operational in Walvis Bay. In Morocco, a $4.5 billion green-ammonia project in Laayoune reached the pre-FEED stage.

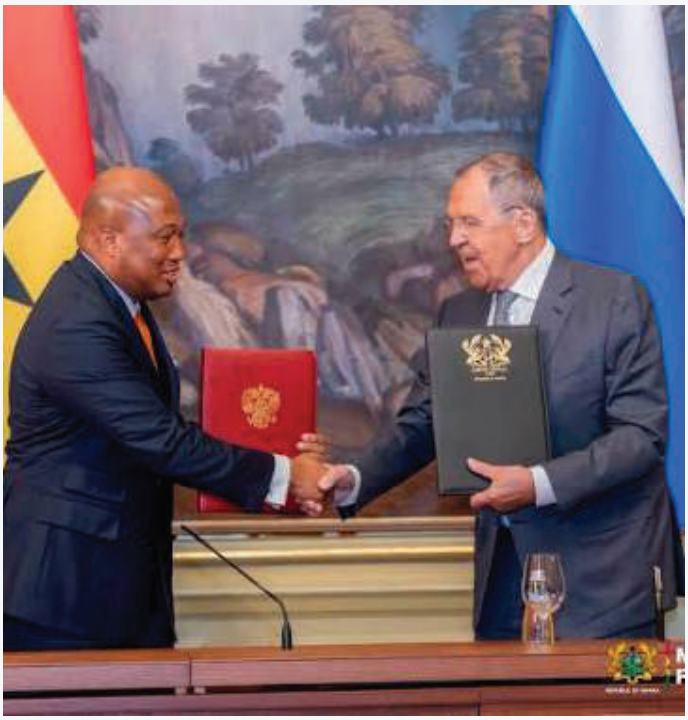
GHANA:

Nuclear Talks with Russia and GoldBod's Move Toward Independence

After meeting Russian Foreign Minister Sergey Lavrov in Moscow, Ghanaian Foreign Minister Ablakwa announced that Ghana would deepen cooperation with Russia under its approximately 700 MW nuclear-energy programme. However, this meeting does not make Russia the selected developer.

Ghana had previously selected NuScale Power and Regnum Technology Group for a small modular reactor project and China's CNNC for the large-scale reactor project. These selections have not changed, and no construction contract has yet been awarded to Rosatom.

During the same week, Ghana's state gold-buying agency GoldBod reduced its dependence on central-bank financing and secured its first $75 million commercial-bank loan. In 2025, it exported approximately 103 tonnes of artisanal gold with an estimated value of $10.8 billion. Gold's share of Ghana's total exports increased from 38.5 percent in 2004 to 63.1 percent in 2025.



Continent-Wide:

Fragmented Renewable Energy Push from Kenya to Egypt

Kenya, through KenGen, raised its long-term renewable capacity target from 1,500 MW to 5,500 MW, while also incorporating a 2,000 MW nuclear programme. However, specialists such as FSD Kenya and CrossBoundary Energy emphasized that distribution-grid losses exceeding 20 percent prevent low generation costs from translating into affordable consumer prices.

In Egypt, Voltalia signed a $24/MWh agreement for the 869 MW Zafarana wind farm, making it one of the lowest tariffs in the region. Scatec's 1.1 GW Obelisk project entered full commercial operation, while the EBRD is planning $192 million in support for Scatec's 900 MW Shadwan wind project.

In Senegal, Senelec and Huawei signed an agreement for 100 MW of solar-plus-storage capacity. During the same week, the government increased the price of petrol by 70 CFA francs per litre due to the burden of fuel subsidies on public finances. In Ghana, the IMF warned about temporary diesel subsidies. On the same day, Foreign Minister Ablakwa discussed nuclear energy cooperation in Moscow. See the Mining section.

In Malawi, Uganda, Zambia, Sierra Leone and Eswatini, small-scale solar and thermal power projects entered operation or moved into grid-integration stages during the week. These included 10 MW in Salima, 24 MW at Ituka, 27 MW at Lunsemfwa, 108 MW at Kissy and 10 MW at Nsoko. The developments show that Africa's electricity deficit is also being addressed through dozens of smaller-scale solutions that receive less attention than major projects. In Zambia, alongside Lunsemfwa's solar-hydropower hybrid integration, the Energy Regulation Board approved $972 million in new energy



projects, equivalent to 18.4 billion ZMW. This came as the country continued to face an electricity deficit, with domestic generation at 1,635 MW against demand of 2,400 MW.

In Egypt, China's Sungrow broke ground on a $50 million energy-storage systems factory in the Suez Canal Economic Zone. It was presented as the first facility of its kind in the Middle East and Africa. The IEA reported that the global LPG crisis triggered by disruptions in the Strait of Hormuz threatens Africa's progress on clean cooking. It found that 3.4 billion people who depend on LPG as their primary cooking fuel face supply disruptions and price shocks, while fewer than 35 developing countries maintain 30 days of stockpiles.

In Nigeria, the Rural Electrification Agency's DARES off-grid programme had provided new electricity access to 5.3 million people by June, with a 2028 target of 16.2 million. A separate report found that 1.93 trillion naira in electricity subsidies paid in 2025 went predominantly to middle-income groups. Approximately 70 percent went to Bands B and C. Band A, the highest service category, received no subsidy and instead paid an additional 101 billion naira, effectively cross-subsidizing the other groups. In Angola, Sonangol confirmed a major gas discovery at the Katambi-2 field in Block 24, a field BP abandoned a decade ago after determining it was not commercially viable. Preliminary results indicate production potential of more than 100 million cubic feet per day, and the field could become Angola's largest gas deposit.

In Rwanda, the Gisagara peat-fired power plant is operating at only half of its design capacity, producing 30–35 MW instead of 70 MW, because of flooding linked to climate change. Approximately $25 million in additional storage investment is required to reach full capacity. Cabo Verde signed a framework agreement with China's CMEC covering power-plant rehabilitation, desalination and smart agriculture. The value of the cooperation has not yet been disclosed. The agreement is significant for a country whose nine islands depend on independently generated and relatively expensive electricity.

Table: Week's Key Energy Investments

Country	Project/Company	Amount	Details
Nigeria	Zimar Group – Dosso refinery	$1.9 billion	100,000 barrels/day, 16-year BOT, company credibility disputed
Mozambique	ExxonMobil – Rovuma LNG pre-investment	$1.1 billion	FID expected in 2026, 18.6 million tonnes/year LNG capacity
Libya	Tobruk–Alexandria crude oil pipeline	$1.3–2.2 billion	Under discussion, FID target 2027
West Africa	Genser Energy financing	456 million Euro	Expansion of operations in Ghana/Côte d'Ivoire
South Africa	Hive Hydrogen Coega	$5.8 billion	Green ammonia, construction scheduled for early 2027
Nigeria	Dangote Refinery IPO preparations	~$5 billion target	Valuation expected at $40–50 billion
Morocco	Laayoune green ammonia	$4.5 billion	Pre-FEED stage, 560,000 tonnes/year capacity

MINING

DRC:

Copper-Cobalt Export Ban Becomes Legal, Uranium-Cobalt Controversy Continues



A decree dated 29 June 2026 immediately banned the export of copper and cobalt concentrates. Web verification confirmed that the measure effectively transformed the de facto restrictions that the DRC had applied since the mid-2010s into a formal legal framework.

The 2026 cobalt export quota was set at 96,000 tonnes. On 12 August, the regulator ARECOMS announced that it would not authorize additional volumes. The claim that cobalt prices had definitively increased fourfold could not be independently verified through web searches. However, a significant upward price pressure and the pricing-in of supply risks in global markets were confirmed.

Against the backdrop of the export ban, a much more serious allegation emerged. A peer-reviewed paper published in Nature Communications on 30 July claimed that between 2000 and 2024, cobalt hydroxide shipments exported from the DRC to China contained between 2,000 and 5,000 tonnes of uranium. The paper reported uranium concentrations of up to 1,100 ppm in some samples from Tenke Fungurume Mining, owned by the Chinese CMOC Group.

Both the DRC government and CMOC categorically rejected the allegation. Kinshasa launched a 60-day verification campaign with IAEA support. Although the scientific source is significant, the findings remain unresolved because both sides have challenged the claims.

In Rubaya, North Kivu, which is under AFC/M23 control, dozens of homes were reportedly demolished in an area where a coltan mining site was allegedly being expanded. More than 100 households were reportedly left homeless. AFC/M23 authorities did not provide a reason for the demolitions. In Manono, lithium mining advanced through concrete infrastructure developments. The first phase of the Kalemie–Manono road reached approximately 85 percent completion. On 22 July, the first vessel carrying lithium concentrate departed from the port of Kalemie toward Tanzania's Kigoma coast, marking Tanganyika's practical entry into international lithium-export networks.

At MIBA, the state-owned diamond company, workers staged two separate protests on 14–15 August over eight months of delayed salaries and blockaded the entrance to the mining area. National diamond production has continued to decline, falling from 10.78 million carats in 2022 to 8.91 million carats in 2025. In Washington, 54 Democratic members of Congress questioned whether the Trump administration was considering lifting sanctions imposed on Dan Gertler under the Strategic Partnership Agreement signed with the DRC in December 2025. The issue remains an unverified but significant concern.

In Kasaï-Central Province, MP Stéphane Muanda called for a judicial investigation on 15 August based on an investigative journalism report alleging that four companies, Oxor Capital, Shashem, Mecopane and Leta Mbawu Mining Company, were conducting unauthorized gold extraction in the Luiza area and paying bribes to local officials. Muanda argued that these activities deprived the people of Luiza of revenues needed for roads, healthcare, education and water infrastructure.

2026 COBALT EXPORT QUOTA WAS SET AT 96,000 TONNES.



Mozambique:

Islamic State's advance toward mining regions

According to a UN Security Council monitoring report, Islamic State Mozambique (ISM) grew to 400–500 fighters through increased recruitment between December and March despite ongoing multinational military operations. The group moved south toward the mineral-rich areas of Meluco and Montepuez, as well as Ancuabe and Chiúre, and began returning to coastal communities, seizing fishing boats off Macomia. This coincided with the same week ExxonMobil made a $1.1 billion pre-investment decision for Rovuma LNG, illustrating the increasingly close proximity between the security front and the energy/mining investment front. A separate investigation alleged that Chinese timber/mining trader Yu Guofa maintained close political protection networks involving former President Nyusi and former General Chipande.

Central African Republic:

107 dead in Zamboye, Wagner's tramadol-gold network

On the afternoon of 18 August, a landslide occurred during heavy rainfall at an illegal open-pit gold mine in Zamboye village, Nana-Mambéré prefecture, near the Cameroonian border. As verified through web sources, the death toll rose rapidly, reaching 107 according to official/media figures by 20 August, and was expected to continue increasing due to people still missing under the debris. This is the deadliest mining disaster of the year. Approximately 500 people were estimated to be working at the site, with at least four Cameroonian nationals among the victims.

Opposition leader Ziguélé criticized the lack of state oversight and called for a parliamentary investigation. This was the fourth deadly mine collapse in the CAR in 2026: 20 people died in Gordi in February, 7 in Ngourroum in March, and dozens in Bé-Mbari in June. Including Zamboye, the annual death toll has exceeded 140. A separate intelligence note revealed that Wagner fighters were operating an opioid network in the CAR, distributing above-standard doses of tramadol to workers at gold mines. According to a GI-TOC estimate, Wagner earns $180 million annually from illegal gold exports from the CAR, with the proceeds reportedly being used to purchase weapons and pay militias.

Mali

JNIM's gold economy and the gradual recovery of Loulo-Gounkoto

An in-depth analysis by The Soufan Center found that Mali's junta is sustained by gold exports and Russian mercenaries, while the same gold economy is also exploited by JNIM. Rather than directly controlling mines, JNIM taxes the routes through which gold is transported. During its April offensive, the group regained control of Intahaka, the largest artisanal gold mine in northern Mali. While the military regime's legitimacy-building is financed by gold revenues, the same resource is also supporting jihadist taxation, leaving state control and the insurgent economy intertwined within the same mining chain. At Barrick's Loulo-Gounkoto complex, operated with an 80% Barrick and 20% state ownership structure, production is gradually recovering following the prolonged shutdown in 2025. Its attributable production in the first half of 2026 was 152,000 ounces, while consolidated production was approximately 190,000 ounces, still well below the 723,000 ounces recorded in 2024. B2Gold, meanwhile, received a new mining license for Menankoto-Sud in the Kéniéba region. The Fékola complex produced 530,700 ounces in 2025 and contributed 4.1 billion FCFA to the Local Mining Development Fund.



Zambia:

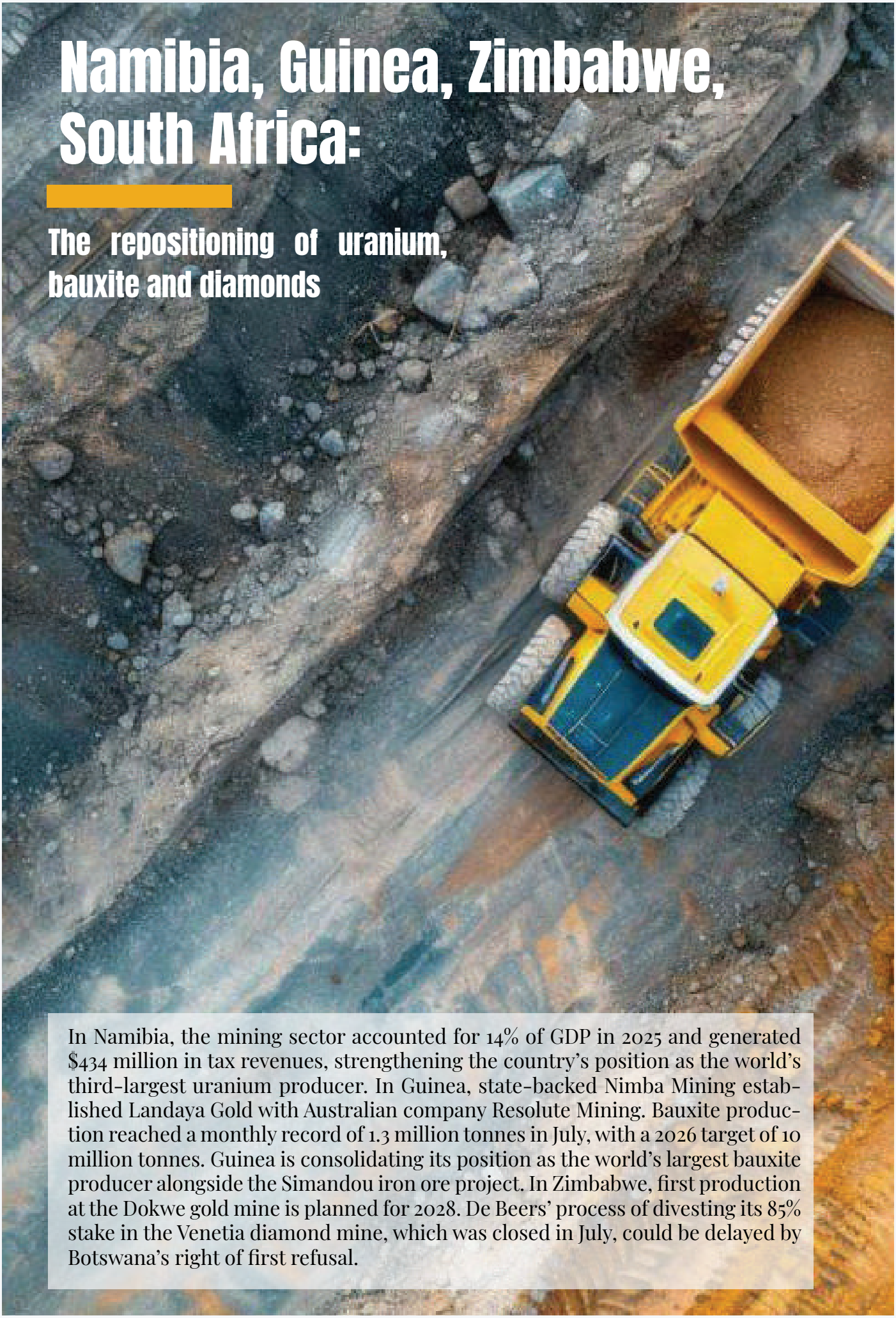
Post-election tensions, continuity in the copper target

Hichilema's re-election with approximately 60% of the vote and the death of former minister Kafwaya the following day became intertwined with the continuity of copper policy. The government maintains its target of increasing annual copper production to 3 million tonnes by 2031, roughly three times the current average. First Quantum, Barrick's Lumwana operation, and KoBold Metals, backed by OpenAI CEO Sam Altman and Microsoft founder Bill Gates, are among the main actors expected to drive this target. Lumwana's revenue increased by 32.1% year-on-year to $852 million in the first half of 2026. Zambia Army Commander Major General Zyeele deployed special forces against illegal gold mining. An analysis by Moyo warned that Zambia's proximity to the DRC and the insurgency in Mozambique are increasing the risk of gold smuggling, which could be interpreted as the potential southward spread of the JNIM–gold–terrorism pattern seen in the Sahel.



Namibia, Guinea, Zimbabwe, South Africa:

The repositioning of uranium, bauxite and diamonds



In Namibia, the mining sector accounted for 14% of GDP in 2025 and generated $434 million in tax revenues, strengthening the country's position as the world's third-largest uranium producer. In Guinea, state-backed Nimba Mining established Landaya Gold with Australian company Resolute Mining. Bauxite production reached a monthly record of 1.3 million tonnes in July, with a 2026 target of 10 million tonnes. Guinea is consolidating its position as the world's largest bauxite producer alongside the Simandou iron ore project. In Zimbabwe, first production at the Dokwe gold mine is planned for 2028. De Beers' process of divesting its 85% stake in the Venetia diamond mine, which was closed in July, could be delayed by Botswana's right of first refusal.



The Sahel:

Lithium as the new frontier, the gold-terrorism economy

In Botswana, the world's second-largest diamond, the 2,488-carat Motswedi, finally found a buyer after remaining on the market for two years, illustrating how prolonged the downturn in the diamond market has become. In South Africa, a rockfall at an abandoned mine near Rustenburg killed 14 illegal miners, most of them nationals of Lesotho, representing another recurrence of the 2024 Stilfontein disaster, in which approximately 90 people died.

In Niger, meanwhile, more than 1,000 tonnes of uranium stockpiled at Niamey airport for nine months remain at the center of a dispute between French company Orano and the government. A Romanian company was reportedly seeking to purchase approximately one-third of this stock. This is occurring as Russia signs nuclear/mining agreements in the Sahel and becomes involved in the Mkuju River uranium project in Tanzania.

An academic analysis found that Boko Haram and ISWAP have begun exploiting weak oversight of lithium mining in Nigeria and Mali as a source of revenue. More than 40,000 tonnes of lithium are currently extracted annually in Africa, and this figure is expected to rise to 500,000 tonnes by 2030. This expansion is occurring faster than security oversight. Similar vulnerabilities have been identified in Niger, Burkina Faso and Chad, with gold and arms-smuggling routes reportedly being adapted for lithium. At an AES ministerial meeting in Ouagadougou, Niger's Mining Minister Ousmane Abarchi stated that "our real challenge is no longer extracting more, but transforming more." Mali's Mining Minister Amadou Keïta said the confederation needs integrated projects in strategic sectors. This rhetoric directly contradicts the fact that, during the same week, JNIM retook control of the Intahaka gold mine.



Senegal:

Fortuna's $200 million Bambadji acquisition and the mining law drama

Fortuna Mining acquired the Bambadji gold project on the Senegal–Mali border from Barrick and IAMGOLD for $200 million in cash. The project is adjacent to the Diamba Sud mine, which Fortuna is developing and which has reserves of 1.15 million ounces. Together, the two projects give the company approximately 60 kilometers of the Senegal–Mali Shear Zone, a Tier-1 gold corridor. The acquisition took place amid Senegal's mining law reform. In March, then-Prime Minister Sonko promised to cancel 71 mining licenses and introduce a new law increasing the state's share. Ten weeks later, he was removed from office amid public-finance pressures. The new law remains in draft form after an eight-month delay, and no public document clearly establishes whether Bambadji will be governed by the new legislation or the 2016 mining law. Mining and petroleum accounted for 9.4% of state revenue in 2023. This uncertainty marks a critical point at which Dakar's revenue-sharing policy is likely to be tested in the coming weeks.



Kenya, Cameroon, Egypt, Liberia, Madagascar: :

A fragmented mining agenda

In Kenya, Tata Chemicals Magadi's license was suspended due to a lack of agreement on royalties and deficiencies in export reporting, putting approximately 500 jobs and social support for a community of 30,000 people at risk. In Cameroon, U.S. company Aeternum Resources acquired an option to purchase 51% of American Renaissance Minerals in an effort to revive the Nkamouna-Lomié cobalt-nickel-manganese deposit in eastern Cameroon. In Egypt, state-owned Sinai Manganese Company is targeting annual production capacity of 50,000 tonnes by 2028. In Liberia, a significant transparency asymmetry was identified in ArcelorMittal's iron ore operations. Global mining segment sales increased from $588 million to $766 million in the first half of 2026, while Liberia's share of global output jumped from 24.5% to 38.9%. However, the company does not publicly disclose Liberia-specific revenue and profit figures, despite making a $200 million upfront signing payment to the government. In Madagascar, the U.S. Development Finance Corporation invested $4.84 million in the Ampasindava project, involving neodymium, praseodymium, dysprosium and terbium. This represents a concrete example of the United States seeking alternative supplies to China's global dominance in rare earths. In the same country, corruption networks were reportedly shifting from rosewood and vanilla to illegal gold exports. In Uganda, the government requested parliamentary approval to write off 2.3 billion Ugandan shillings in unpaid mining rents accumulated by Kilembe Mines between 2018 and 2024, as part of efforts to revive the country's former main copper producer.



Across the continent:

Botswana's shift from diamonds to copper, Guinea's FDI record, Nigeria's mining-education mismatch



Botswana is attempting to shift the center of gravity of its economy away from its long-standing dependence on diamonds toward copper. The $900 million expansion at the Khoemacau copper mine will increase annual production from 60,000 to 130,000 tonnes. At full production, the mine is expected to generate approximately $1.4 billion in annual value, equivalent to around 7% of the country's GDP. Guinea became the largest recipient of foreign direct investment in sub-Saharan Africa in 2025 due to mining, ranking second on the continent after Egypt. In Nigeria, solid mineral revenues increased from approximately 6 billion naira in 2023 to 71 billion naira in 2025. An analysis revealed a mismatch between mineral wealth and educational indicators. Zamfara and Kebbi lie in the country's main gold belt, yet both rank among the worst in educational outcomes; Zamfara's literacy rate of 19.16% is among the lowest in the country. In the same state, two separate fatal mine-pit collapses occurred in Plateau within a single week, killing at least 14 people in total, seven in Kassa and seven in Gassa. The Federal Government offered more than 4,000 abandoned mining pits to investors.

In Nasarawa State, meanwhile, West Africa's largest lithium processing plant, reportedly with a capacity of 6,000 metric tonnes per day, is operational. A major Chinese lithium buyer sent a private aircraft to take the governors of Nasarawa and Zamfara to China, indicating that Nigerian minerals are increasingly being viewed as strategic assets in global supply chains. The UN Office on Drugs and Crime (UNODC) called for deeper cooperation with the Nigeria Security and Civil Defence Corps' "Mining Marshals" unit, highlighting the links between illegal mining, organized crime and terrorism. In Côte d'Ivoire, illegal gold mining continues to expand despite increased enforcement. More than 8,500 sites have been cleared since 2021, but SWISSAID estimates 30–40 tonnes of undeclared production annually. Most of this is believed to be smuggled through Burkina Faso and Mali, with part of it passing through the border region where JNIM derives resources. In Mauritania, SNIM's $2 billion Al-Aouj iron ore project reached a final investment decision. In Malawi, the Kangankunde and Kasiya projects are attracting Western investor interest as alternatives to China in rare earth element and graphite supply chains.

Table: Key Mining Data of the Week

Country	Development	Figure
DRC	Cobalt export quota (2026)	96,000 tonnes
DRC	National diamond production (2025)	8.91 million carats, declining trend
CAR	Zamboye gold mine collapse	107+ dead
CAR	Wagner's annual illegal gold revenue	$180 million, GI-TOC estimate
Mali	JNIM ransom revenue	$50 million
Mali	Loulo-Gounkoto first-half production	152,000 ounces, well below 2024
Zambia	2031 copper production target	152,000 ounces, well below 2024
Guinea	Bauxite production, July record	3 million tonnes/year
Namibia	Mining tax revenue, 2025	$434 million, +39%

REGIONAL ANALYSIS


LIBYA
EGYPT
AFRICA
NIGER
CHAD
NIGERIA
CAMEROON
CENTRAL AFRICAN REPUBLIC
Ghat
Marzuq
Al Jawf
Siwa
Cairo
Giza Pyramids
Asyut
Farafra
Luxor
Aswan
Abu Simbel
Dongola
Pic Zoumri
Adrar
AIR MTS
Faya-Largeau
Faya
Abeche
Ati
Sudan
Agadez
Zinder
Maradi
Maiduguri
Ndjamena
Am Timan
Bongor
Sarh
Kano
Kaduna
Abuja
Benin City
Aba
Douala
Yaounde
Malabo
Moundou
Sangha
Bangui
Nola
Gemena
Lisala
Kisangani
Libreville
Sao Tome
Mbandaka

The Intersection of Sovereignty Rhetoric and Resource Taxation

The four themes of the week converge along a single line: the military regimes in the Sahel base their legitimacy-building on the rhetoric of natural-resource sovereignty, yet the same resources also form the backbone of jihadist economies. In Niger, General Tiani's statement that "France lost free uranium in Niger, free gold in Burkina Faso, and Mali's gold and lithium" was voiced in the same week as AES ministers emphasized in Ouagadougou that "the challenge is no longer extracting more, but transforming more." Yet during precisely the same week, JNIM retook control of Intahaka, northern Mali's largest artisanal gold mine. According to the UN's report on $50 million in ransom revenues, these funds financed the group's "unprecedented" attack capacity, while the San military barracks was also attacked that same week. As The Soufan Center found, Mali's junta is sustained by gold exports and Russian mercenaries, but the same gold routes are also taxed by JNIM. State legitimacy and the insurgent economy are therefore feeding into each other at opposite ends of the same mining chain. This pattern is not limited to the Sahel: in Nigeria, Boko Haram and ISWAP exploit weak oversight of lithium mining; Zamfara's gold belt is home both to some of the country's worst educational indicators and its most intense banditry crisis; in Sudan, revenue from RSF-controlled Jebel Amir gold mines turned Hemedti into "an army with a bank account"; and in Zambia, a security analyst warned that a similar infiltration could spread into southern Africa through extremist groups originating from the DRC and Mozambique.

The second line concerns the widening gap between diplomatic texts and realities on the ground. The monitoring mechanism of the DRC–Rwanda Washington Agreement advanced through five separate meetings and statements during the week, and the DRC returned its first detainees to M23. Yet during the same week, six settlements in Kalehe fell into the hands of AFC/M23, a hotel in Fizi was hit by a drone attack, and front lines in Masisi and Walikale shifted on a daily basis. The same gap is visible in Sudan: while an African Union delegation paid a "historic" visit to Khartoum, El Obeid was simultaneously trapped under an RSF siege involving 500,000 people, and the EU Council reportedly bypassed Burhan's political initiative. In Libya, while the UN Security Council welcomed UNSMIL's Structured Dialogue, Zawiya was hit by a sixth drone strike and protests calling for the resignation of the government expanded in Tripoli. The picture is therefore one in which the number of signed texts is increasing without a corresponding decline in violence on the ground, which continues at essentially the same pace.

"The monitoring mechanism of the DRC-Rwanda Washington Agreement advanced through five separate meetings and statements during the week, and the DRC returned its first detainees to M23; yet during the same week, six settlements in Kalehe fell into the hands of AFC/M23."

The third line materializes in competition over energy corridors. The rivalry between the Trans-Saharan Gas Pipeline and the African Atlantic Gas Pipeline follows the same logic as the competition between Lamu and Tanga: multiple external actors are building competing corridors for



the same hydrocarbon potential across the continent, including Algeria's structurally advantageous connection to Europe, Morocco's search for U.S. financing, and Vitol's position as Uganda's exclusive supplier. None has fully closed its financing. Europe's post-Russia energy-security drive is accelerating this competition: Algeria's gas share, Niger's uranium and Libya's oil are simultaneously becoming more prominent in the EU's diversification agenda, while Russia is moving into the same vacuum through nuclear and mining agreements in Mali, Burkina Faso, Niger and Tanzania. The fourth line is the same intensity of external-actor competition along the diplomatic axis. While Türkiye celebrated 15 years of partnership with Somalia, it also hosted Fidan at Haftar's family compound in Libya. While the U.S. Congress questioned the transparency of mining agreements involving the DRC, AFRICOM conducted the first strike of the Trump era in Somalia. China supplies weapons both to the DRC government and to Rwanda, which supports M23. There is no single consistent alignment for any external actor. Each is simultaneously investing in multiple sides within its own sphere of strategic competition.

The relationship between the electoral cycle and security was also a prominent theme of the week. In Zambia, an opposition leader was targeted the day after Hichilema's re-election, while a former minister was killed in crossfire. In Nigeria's Osun State, a by-election was overshadowed by allegations of violence. In Kenya, preparations for the 2027 election have already become increasingly tense. These three cases point to a regional trend in which post-election security operations become intertwined with pressure on the opposition, while the rhetoric of "stability" effectively turns into an increasingly hardened mechanism of control.

"China supplies weapons both to the DRC government and to Rwanda, which supports M23."

CONCLUSION

This week's evidence points to a single conclusion:

Security and resource economies in Africa can no longer be analyzed separately, because in case after case the same revenue stream is financing both state authority and the forces contesting it. In Mali, the causal chain is direct — a ransom payment financed the attack on a military barracks, the ransom itself flowed from a gold economy, and control over that economy passes through both the junta and JNIM. The same structure recurs beyond the Sahel: in Sudan, revenue from RSF-controlled Jebel Amir gold mines has turned Hemedti into what analysts describe as "an army with a bank account," and that same financing base is now sustaining the very siege of El Obeid. In Nigeria, Zamfara's gold belt is simultaneously home to some of the country's worst educational indicators and its most intense banditry crisis, a pairing that is no longer coincidence but a documented pattern of resource wealth converting into insecurity rather than development.

A second, equally consistent line runs through the gap between diplomatic text and battlefield reality. In the DRC, the number of signatures on the Washington Agreement keeps rising — five separate meetings and communiqués this week alone, plus the return of the first detainees to M23 — yet control on the ground does not shift, because the economic core of the fighting in Kalehe, Fizi and Masisi remains rooted in coltan and lithium routes that no negotiating table has touched. Sudan shows the same disconnect from another angle: an African Union delegation paid a "historic" visit to Khartoum in the same week that El Obeid fell under an RSF siege affecting roughly 500,000 people, and the EU Council was separately reported to have bypassed Burhan's political initiative altogether. Libya completes the pattern — the UN Security Council welcomed the conclusion of UNSMIL's Structured Dialogue even as Zawiya absorbed its sixth drone strike of the week and protests calling for the government's resignation spread through Tripoli. In each case, the volume of diplomatic output is rising without a corresponding decline in violence, which continues at essentially the same pace it did before the agreements were signed.

A third thread runs through the competition for energy corridors and external influence. The gap between Algeria's structural advantage — a pipeline route already tied into the European network — and Morocco's continued search for financing will determine which country captures the larger share of Europe's post-Russia supply diversification, a competition playing out in parallel along the Trans-Saharan and African Atlantic gas pipeline projects and in the Lamu-Tanga corridor rivalry in East Africa. No external power is choosing sides consistently: China arms both the DRC government and Rwanda, which backs the M23 rebellion it is nominally fighting; Turkey courts Haftar in Benghazi in the same week it marks fifteen years of partnership with Mogadishu; and Washington presses Kinshasa on mining-contract transparency while AFRICOM simultaneously opens a new front in Somalia. Layered on top of this is a fourth, more domestic pattern — in Zambia, Nigeria's Osun State and Kenya, electoral cycles are increasingly producing security crackdowns rather than resolving political competition, suggesting that "stability" rhetoric is becoming a mechanism of control as much as a description of conditions on the ground.

Four concrete thresholds should be monitored next week: whether the DRC's 60-day uranium-cobalt verification timetable holds and what it finds; whether the siege of El Obeid tips from a humanitarian emergency into a full-scale catastrophe; whether Zambia's post-election tensions escalate from an investigation into a broader crackdown on the opposition; and whether the widening gap between diplomatic signatures and battlefield control in eastern Congo and Sudan begins to narrow, or instead confirms that resource geography, not negotiating tables, is what ultimately sets the terms on the ground.



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Istanbul, Turkey
contact@mintelworld.com
https://www.mintelworld.com/