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EDITOR'S NOTE

The African agenda for the week of 29 August – 3 September 2026 highlights the stark contrast between global competition across the continent and deepening security vulnerabilities. In West Africa and the Sahel, the suppression of a mutiny attempt in Niger with Russian and Algerian interventions demonstrates how security guarantees are shifting along the East-West axis and how state fragility is being managed by external actors. Simultaneously, Africa has become an open arena of struggle among global powers for critical minerals and energy resources; from copper diplomacy in Zambia and Simandou iron ore shipments in Guinea to Chinese investments in Nigeria and Angola's steps toward strengthening local energy ownership, major players including the US, China, India, and Gulf states are actively expanding their market share. Although positive institutional milestones were recorded in the economic and infrastructure spheres—such as Senegal's IMF agreement and Nigeria's market records—ongoing crises including mass kidnappings in Plateau, escalating conflicts in Eastern DRC and Sudan, and an Ebola outbreak show that the divide between the continent's raw material wealth and its on-the-ground security and governance deficits continues to widen.

Levent Kemal

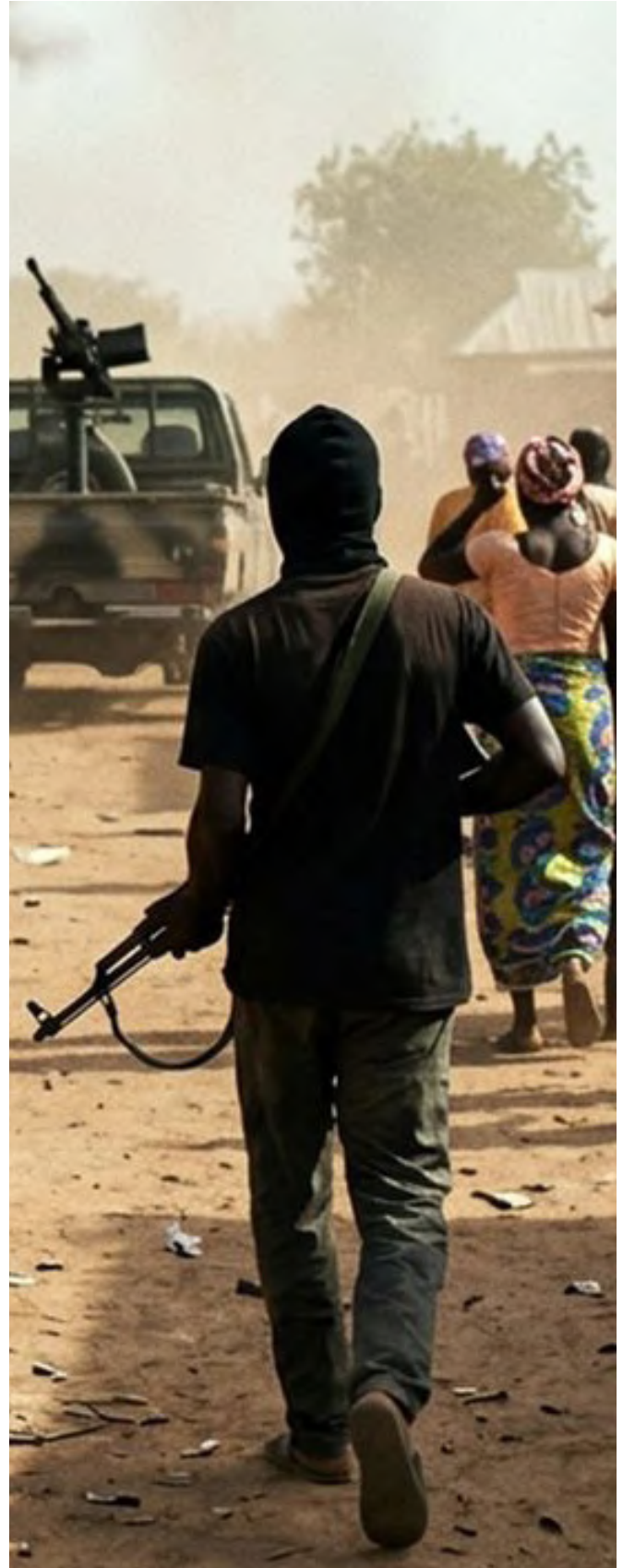
Executive Director, MINTEL WORLD

OVERVIEW

The dominant West African agenda this week was shaped not by a single capital but by developments unfolding between Abuja and Niamey. Nigeria's Defence Headquarters announced that 1,487 terrorists and insurgents had been killed and 777 hostages rescued during operations conducted across the country between July and August. At the same time, Plateau State recorded attacks by Fulani herders on an almost daily basis, while new mass kidnapping incidents were reported in Kogi, Zamfara and Niger states. In neighbouring Niamey, an attempted mutiny at an airport base was reportedly suppressed with direct assistance from Russia's Africa Corps, according to Moscow's ambassador, while Algeria simultaneously delivered Su-30 fighter aircraft to the same government. The developments demonstrated how many external security guarantors are now competing for influence in the same Sahelian capital.

Senegal's week was shaped more by financial developments than by weapons. On 1 September, Dakar secured a three-year IMF programme worth \$2.2 billion. The agreement came one day after Moody's downgraded Senegal's sovereign credit rating by one notch to Caa2, while the government decided to exclude CFA-denominated debt from its restructuring plans. In South Africa, the competition for critical minerals began translating into clearly defined positions. India resumed talks with Zambia on copper on 26 August as part of its objective of securing 50 overseas mining assets by 2031. The move came days after Hakainde Hichilema began his second term in Zambia, despite his main rival remaining in prison on treason charges.

US Assistant Secretary of State for the region Frank Garcia is expected to raise the issue during his own Lobito Corridor diplomacy. Guinea's Simandou iron ore project shipped its first cargo through the new Morebaya port. This Chinese-financed logistics chain could reshape global iron ore supplies as directly as an OPEC decision can affect the global oil market. Angola hosted the African Union's extraordinary Peace and Security Summit in Luanda on 29 and 30 August, while quietly completing a \$260 million Etu Energias-Chevron agreement. The deal gives an Angolan company operatorship of a deepwater offshore block. It represents a small but significant indication of the broader continental trend toward gaining greater ownership over resource extraction rather than merely hosting foreign extraction activities.



CONFLICT AND WAR

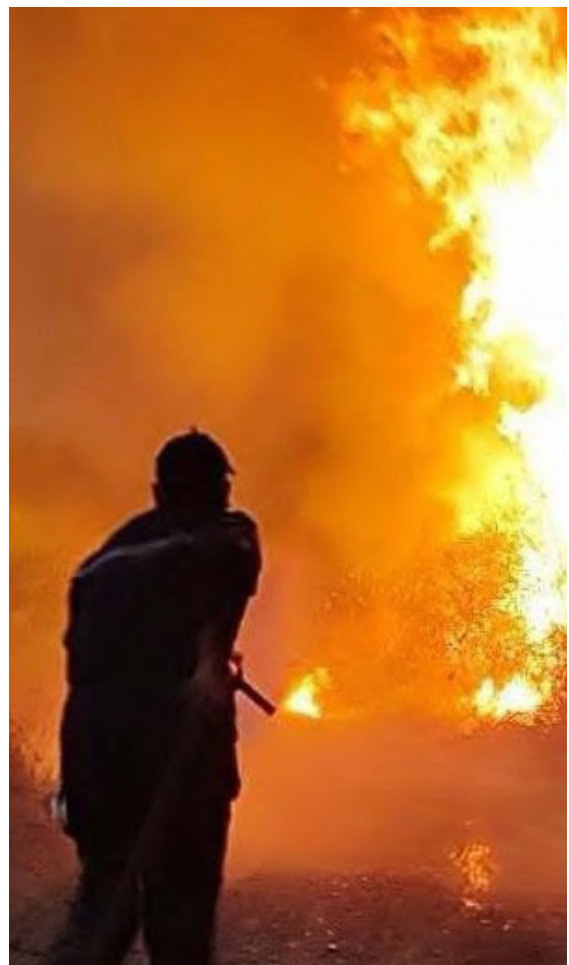
ALGERIA.

President Abdelmadjid Tebboune ordered the Penal Code to be amended by 15 September to introduce the death penalty for those found to have deliberately started forest fires. The fires caused at least 12 deaths and left 54 people injured, including 6 in serious condition, across northern, central and eastern Algeria. The army was deployed alongside civil protection teams in Jijel and El Taref, while Tebboune launched an investigation into whether the fires had been deliberately started.

Meanwhile, following the attempted mutiny during the night of 28 to 29 August in Niger, Algeria sent four Su-30 fighter aircraft, one Il-76 transport aircraft and one Il-78 aerial tanker to Niger's Base 101 on 30 August. The deployment came weeks after the delivery of four helicopters. According to Algerian analysts cited by Jeune Afrique, the move marked the first time Algeria had militarily intervened in another state's internal crisis since independence in 1962. It therefore represented a departure from a diplomatic-first approach that had been maintained for more than six decades.

The military deployment intersects with Ankara's own drone diplomacy in the Sahel, as Mali and Niger are already operating the same Bayraktar systems. Algeria's shift from mediator to military actor, combined with Russia's decisive intervention in Niger, demonstrates the extent to which Western security guarantees in the Sahel are being replaced by an emerging Moscow-Algiers axis. Washington and Paris are now watching these developments from the outside.

"FOR THE FIRST TIME SINCE INDEPENDENCE IN 1962, ALGERIA HAS MILITARILY INTERVENED IN ANOTHER STATE'S INTERNAL CRISIS."



LIBYA/ MOROCCO.

Behind the diplomatic manoeuvring, the Haftar and Dbeibah camps continue to compete for influence across the Sahel through the Fezzan corridor extending toward Niger and Chad. According to a report by Jeune Afrique this week, Saddam Haftar is managing his father's network amid internal family rivalries and defections. The crisis in Tripoli is more routine but no less restrictive, as an emergency over bread and flour supplies prompted the government to hold its first crisis committee meeting this week. Fuel distribution also remains under pressure because of delayed shipments, according to the marketing arm of Libya's National Oil Corporation.

Libya represents Turkey's most direct military and political interest on the continent. Since 2019, Ankara has maintained a defence cooperation agreement with the Tripoli-based government and continues to arm and train forces affiliated with the Government of National Accord. This makes the durability of the 4+4 process a direct Turkish security interest. Libya's prolonged failure to achieve political reunification remains the central obstacle that external powers ranging from Washington to Moscow and Ankara continue to manoeuvre around rather than resolve.

Morocco is deepening its own security relationship with Washington. On 31 August, the US Air Force awarded CAE Inc. a \$42.1 million contract for two F-16 Block 72 full-mission simulators, which will be built in part at Sidi Slimane Air Base. The contract forms part of a programme approved in 2019 that includes 25 new F-16C/D Block 72 aircraft at an estimated cost of \$3.8 billion.



NIGER.

Young officers, including members of Niger's special forces, attacked the presidential palace, the state television station and Air Base 101 next to Niamey International Airport during the night of 28 to 29 August. This was the third similar incident at the base since January. General Abdourahamane Tiani retained control of the presidential palace through the support of a loyalist guard unit, while the mutineers became confined to the air base. Uncertain about which units still remained loyal to him, Tiani directly appealed to Russia's Africa Corps for assistance. The force's local headquarters is located close to the airport.

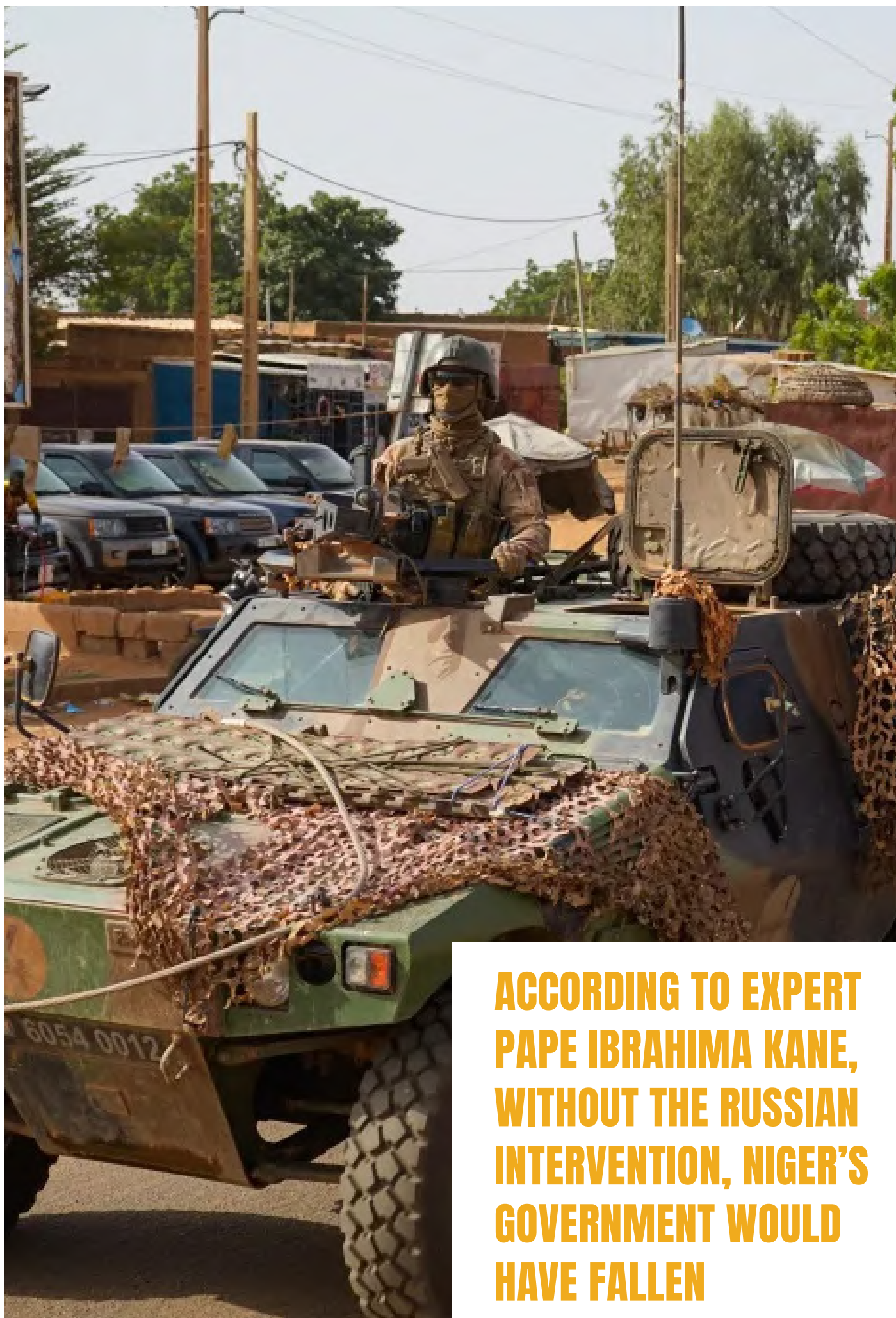
Russian Ambassador Viktor Voropayev confirmed that Africa Corps personnel intervened that evening at Niger's request and used drones carrying explosives against rebel positions armed with 12.7mm and 14.5mm machine guns. As their ammunition supplies dwindled, the mutineers eventually surrendered. Three presidential guards were killed and given a military funeral at Air Base 101 on 1 September. Dozens of mutineers were killed or detained, although there is no independently verified casualty figure.

Algeria followed the intervention one day later with what has been described as its first military intervention outside its borders. Niger's AES partners Mali and Burkina Faso, meanwhile, limited their response

to political solidarity even though the alliance's joint force is also based at Air Base 101. This exposed the limits of the AES's collective defence capacity, as analysts described to Jeune Afrique.

The competing interpretations of the night's events are as significant as the fighting itself. The AES bloc described the incident as an act of "betrayal". The armed opposition movement Patriotic Liberation Front praised the "courage" of the mutineers and called on other military units to move against the CNSP junta that came to power in July 2023. Nigerien paratrooper Captain Roger Gabriel later told state television that he had been contacted by a Chadian officer. According to Gabriel, the officer claimed that Chad was preparing an intervention, "led by its own authorities and French special forces", to support the mutineers.

Separate contacts also suggested that a Benin-Côte d'Ivoire-French intervention was being considered. Chadian President Mahamat Idriss Déby Itno appeared to reject the allegations indirectly by sharing a Quranic verse warning against mixing truth with falsehood rather than issuing a formal denial. Governance expert Pape Ibrahima Kane told DW that without the Russian intervention, "there would be a new government in Niger today". This dependence leaves Tiani's junta more, rather than less, vulnerable.



**ACCORDING TO EXPERT
PAPE IBRAHIMA KANE,
WITHOUT THE RUSSIAN
INTERVENTION, NIGER'S
GOVERNMENT WOULD
HAVE FALLEN**

MALI.

Four years after severing its ties with France, Bamako is quietly calculating the cost of its replacement security partnership. Since 2023, approximately \$900 million has been paid to Wagner and subsequently to the Africa Corps. Of this amount, Wagner received approximately \$681 million between 2023 and mid-2025 based on an estimated monthly payment of \$10 million, while \$202 million was paid for the Africa Corps' initial contingent of 1,000 personnel.

According to ACLED data cited by the US-based Africa Center for Strategic Studies, civilian deaths attributed to Islamist militants in southern Mali increased by 87 percent between 2023 and 2024, rising from 168 to 314. The United Nations, meanwhile, recorded more than 19,000 human rights violations during the first half of 2024, compared with approximately 5,000 during the same period of the previous year.

Researchers at West Point concluded at the end of 2024 that there was “little evidence” of concrete security gains resulting from the deployment of the Africa Corps. The researchers described the primary success of the deployment as deterring coups rather than protecting the population. There is also no trace of financial transfers that could be linked to Russian-affiliated mining networks in the gold revenues that reached 835 billion CFA francs in 2024.

Regional analysts compare this situation to the Central African Republic model, where resource extraction has taken place without generating corresponding benefits for the state. This reassessment is increasingly visible in Bamako's diplomacy.

Separately, a Malian military court sentenced Colonel Alpha Yaya Sangaré to 20 years in prison on 3 September for publishing an article on terrorism.



BURKINA FASO.

Burkina Faso reduced its budget deficit from 5.8 percent of GDP in 2024 to 1.8 percent in 2025, comfortably below the regional ceiling of 3 percent. According to economist Salifou Ouedraogo, tax authorities collected 448 billion CFA francs in July 2026 alone against a target of 369 billion CFA francs.

This represented an achievement rate of 121 percent, driven by gold revenues and a new digital payment platform. Customs authorities also collected 124 billion CFA francs in August, exceeding the target by 6 billion CFA francs. Bassolma Bazié, President of the CN-CES, used these figures this week to deliver a different message. Bazié called on civilians to support the army and VDP volunteer fighters “through actions rather than slogans”.

He invoked the 1998 assassination of journalist Norbert Zongo as a warning against political complacency amid the continuing jihadist insurgency and proposed that officials take oaths on their native soil as an anti-corruption measure.

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CHAD.

SUDAN.

The Sudan Founding Alliance, a coalition led by the RSF, continued advancing toward Damazin, the regional capital of Blue Nile, after capturing Geissan, Kurmuk, Bakori and Sarkam. These gains could also give RSF commander Mohamed Hamdan Dagalo greater leverage over the Roseires Dam, one of Sudan's most important hydroelectric and irrigation assets.

Yale University's Humanitarian Research Lab detected a sixfold increase in the number of vehicles at the ENDF base in Asosa, Ethiopia, between 23 and 28 August. The increase involved approximately 100 new light technical vehicles with a combined capacity of transporting up to 1,000 personnel. The laboratory assessed this as a brigade-scale reinforcement. The deployment may be linked to an imminent RSF assault on Damazin, while it could also have been intended to allow army forces to be redeployed away from North Kordofan at the same time.

The army commander, Abdel Fattah al-Burhan, visited Damazin on 3 September to inspect the Fourth Infantry Division. Separately, he ordered airstrikes against sus-

pected RSF positions near Tina, close to the Chadian border. Meanwhile, the TISIS Leadership Council concluded its fourth session in Nyala between 26 and 30 August under the chairmanship of Dagalo.

The council approved a framework for "just and sustainable peace", a commitment to establish a new national army and the 2026 interim budget. These institutional steps indicate that the alliance is preparing for a prolonged parallel state rather than a negotiated settlement.

A UN Fact-Finding Mission told the Human Rights Council on 3 September that foreign-supplied drones and personnel had produced "a definitive shift toward advanced air warfare" since 2025. The mission documented more than 1,000 civilian deaths from drone strikes alone between January and 11 May.

The attacks struck hospitals, markets and weddings. The findings were presented as potentially constituting "war crimes". The mission traced RSF supply networks through the UAE, Chad, southeastern Libya and Puntland in Somalia. This geography directly overlaps with Chad's own militarisation of its borders.



SOMALIA.

Security tensions surfaced on several fronts this week. Somali forces repelled an attack on Baidoa on 3 September by militias loyal to Abdiiaziz Hassan Mohamed Laftagareen, the ousted governor of South West State. Somalia's Ministry of Defence said the militias were operating alongside al-Shabaab fighters.

Meanwhile, Somalia's intelligence agency NISA announced on 30 August that a joint operation with international partners had killed Abdullah Hashi Labajir in Jilib on 23 August. Labajir had served as al-Shabaab's intelligence chief, bringing his 13-year tenure at the head of the group's internal security apparatus to an end. Uganda's Chief of Defence Forces, Muhoozi Kainerugaba, announced a firm withdrawal date of 1 August 2027 for all Ugandan troops. Kampala's Ministry of Defence, however, insists that a bilateral agreement will keep some forces in Somalia regardless of the fate of AUSSOM.

Turkish and Somali forces raided the MV Lutuf cargo vessel, which had been hijacked on 29 and 30 August. Fourteen pirates were killed and the vessel was rescued. Ankara said the ship was carrying Turkish military and communications equipment intended for the training base in Mogadishu when it was seized off the Puntland coast on 17 August. The dispute emerged at the same time as Turkey deployed two warships, TCG Kemalreis and TCG Yzb. G ng r Durmus, to conduct operations from Djibouti in support of Somalia's federal maritime forces.

Puntland President Said Abdullahi Deni warned that the deployment could become a pretext for foreign access to Somalia's fishing grounds and offshore resources. Somalia is now Turkey's deepest and most contested security relationship on the continent. A major training base, a naval deployment and a dispute over an alleged ransom payment involving a Turkey-linked cargo vessel are all unfolding simultaneously, testing Ankara's ability to manage both Mogadishu and a sceptical Puntland.





ETHIOPIA.

Days after Ethiopia's national dialogue, which brought together more than 4,000 delegates, concluded on 22 August, fighting resumed in western Tigray between federal and Tigrayan forces. Drone strikes were reported around Mekelle and southern Tigray. Territorial disputes, unresolved accountability for wartime atrocities and allegations of forced recruitment remain unresolved on both sides. Major opposition parties boycotted the dialogue entirely, while armed groups were excluded.

A parallel and less examined wave of violence has been affecting Oromia's Orthodox Christian community since late February. An attack on a market in Arsi killed at least 20 Orthodox worshippers and one Muslim security guard. In May, a more than century-old Saint Gabriel church was burned down, with between 37 and 40 people reportedly killed in surrounding villages. The Ethiopian Human Rights Commission attri-

butes much of the violence to fighters from the Oromo Liberation Army.

The Ethiopian Inter-Religious Council, however, found that the motive for the February attack remained unclear. Patriarch Abune Mathias of the Ethiopian Orthodox Tewahedo Church described the violence as a "chain of violence" that the government had failed to address. Four suspected UAE-origin IL-76 cargo flights to Ethiopia were also detected this week.

Analysts warn that the Blue Nile is "now the target of a mini-state while also protecting Ethiopia from Tigray". This claim overlaps with Yale's satellite findings concerning the buildup at the Asosa base, as referenced in the Sudan section. The same assessment also corresponds with reports that Addis Ababa is supporting the RSF as a counterweight to the ties between Sudanese army commander Burhan, Eritrea, Egypt and the TPLF.



SOUTH SUDAN/ UGANDA.

South Sudan's ceasefire monitoring body warned that despite a reduction in major fighting, localised violence, abductions and forced recruitment continue.

The opposition SPLM-IO's own leadership crisis deepened in parallel. Acting chairman Oyet Nathaniel Pierino dismissed interim Secretary-General Regina Joseph Kaba and seven senior officials on disciplinary grounds.

Kaba responded by issuing a counter-order dismissing Oyet. Party leader Riek Machar has been detained in Juba since March 2025 over allegations linked to the Nasir clashes. The party now faces two competing centres of authority ahead of elections that both factions claim to support.

Uganda confirmed this week that it will withdraw its troops from Somalia by 1 August 2027. Kampala's Ministry of Defence nevertheless insists that a bilateral security agreement will keep some forces in Somalia regardless of what happens to AUSSOM.

According to diplomatic sources speaking to the publication Ayin, Sudan's war is becoming increasingly intertwined with the older Ethiopia-Eritrea rivalry. Ethiopian officials are growing increasingly concerned about army commander Abdel Fattah al-Burhan's deepening military ties with Eritrea, Egypt and Tigrayan forces. Addis Ababa interprets these relationships as interference in its own security affairs. Prime Minister Abiy Ahmed declared in July that Ethiopia had "no fear of any alliance involving Eritrea, the TPLF and Sudan".

There are allegations that Eritrea's Massawa airport is serving as an entry point for weapons shipments destined for the Sudanese army and TPLF fighters. Jonas Horner of the European Council on Foreign Relations said Eritrea was providing training camps and shelter to the Sudanese army, while Ethiopia appeared to be hosting rear bases for the RSF. Horner warned that "a conflict between Eritrea and Ethiopia would immediately regionalise Sudan's own war".

Former Sudanese intelligence chief Salah Gosh is reportedly being relocated from Cairo to Asmara. Sources link the move to a UAE legal case concerning intercepted weapons shipments and to Egypt's own deepening coordination with Eritrea. Burhan is also reported to have met with Gosh during his most recent visit to Asmara.

ERITREA.

DRC, RWANDA AND BURUNDI

The situation on the ground is genuinely two-sided. The AFC/M23 accused FDLR fighters of killing four civilians and abducting two women near Rutshuru on 1 September. Separately, FARDC forces, Wazalendo fighters and the Burundian army reportedly attacked M23 positions in Mwenga and Fizi using 120mm and 82mm mortars as well as kamikaze drones. Days later, FARDC's Sukola 2 operational sector announced that it had retaken four settlements in the high plateaus of Uvira and Fizi, namely Malimba, Masango, Ruhua and Rubarati. FARDC also reported that it had neutralised 23 fighters from what Kinshasa described as the "RDF-M23-Twirwaneho-Red Tabara terrorist coalition" and discovered a civilian mass grave in Masango.

Confirmed cases in the Bundibugyo-type Ebola outbreak surpassed 6,000, with 2,911 deaths recorded across 60 health zones in six provinces as of 1 September. The World Health Organization said the outbreak was on course to surpass the 2014-2016 West African outbreak, which remains the deadliest Ebola outbreak on record.

UN emergency relief coordinator Tom Fletcher warned member states on 1 September that "time is not on our side". According to Fletcher, the response is struggling to keep pace with transmission amid insecurity and a strike by health workers.



Nigeria's Defence Headquarters announced during a National Counter-Terrorism Centre briefing on 2 September that troops had killed 1,487 terrorists and insurgents, rescued 777 hostages and arrested 354 suspects during 7,062 operations conducted between July and August. However, detailed reporting from Plateau State tells a parallel story that is obscured by the aggregate figures.

Berom militia cattle raids, attacks by Fulani herders and retaliatory killings were recorded almost daily throughout the reporting period in the Riyom, Bassa, Mangu, Wase and Barkin Ladi local government areas. Separate mass kidnapping incidents meanwhile targeted National Youth Service members in Kogi State, worshippers in Borgu Local Government Area of Niger State and communities across Sokoto and Zamfara.

NIGERIA.

DIPLOMACY



TUNISIA.

German Foreign Minister Johann Wadepuhl signed financing agreements worth more than €100 million euro in Tunisia on 31 August. A further €40 million euro is under discussion for green economy projects. Bilateral trade reached a record €5.3 billion euro in 2025, generating a €1.1 billion euro surplus for Tunisia. More than 320 German companies are now operating in Tunisia, primarily in automotive components and electronics, employing more than 93,000 people.

President Saied used the visit to pressure Berlin and Brussels to renegotiate the EU-Tunisia partnership agreement, arguing that Tunisians had never benefited

from the loans taken out in their name. Tunisia's water and prison crises are directly feeding into the EU's calculations over migration containment.

The same 2023 EU-Tunisia agreement that Saied is currently challenging represents a model that Brussels is seeking to replicate elsewhere in the Maghreb. As the number of deaths among prisoners increases, defending the human rights conditionality attached to this financing will become increasingly difficult.

For Ankara, Tunisia is less a bilateral market than a host venue for Libya diplomacy. The Rome and Tunis rounds of the Libya 4+4 talks that produced Sunday's agreement in Tripoli were conducted through Tunisian and Italian channels. This demonstrates that Maghreb capitals continue to serve as neutral ground for the Libya file, where Ankara has a direct military interest.

LIBYA.

Libya's rival political camps signed an agreement at the UNSMIL headquarters in Tripoli on 30 August under UN mediation. The agreement was the product of talks held in Rome and Tunis. The signing took place in the presence of Presidency Council member Moussa al-Koni, representatives of the House of Representatives and the High State Council, the Government of National Unity and the international follow-up group. The agreement covers the first two steps of the UN roadmap, including the restructuring of the High National Election Commission and the establishment of a 24-month timeframe for presidential and legislative elections.

However, these provisions are conditional on Libya having "a single executive authority and unified national institutions". That condition has not yet been met. On the same day, Presidency Council President Mohamed al-Menfi issued a decree appointing Imad al-Shadhili al-Saeh to chair the restructured commission. High State Council President Mohamed Takala boycotted the signing ceremony, arguing that the mini-dialogue format did not have a sufficient level of representation to decide electoral and constitutional questions. House of Representatives member Saeed Emghib, meanwhile, accused the High State Council of attempting to prolong Libya's division. The EU mission welcomed the agreement as a step toward unifying state institutions.



MOROCCO AND ALGERIA.

The kingdom's continuing dispute is also agricultural. The EU's 2025 decision to allow tomatoes grown in Dakhla to carry a Moroccan regional label is viewed by Rabat as another normalisation of its claim over Western Sahara. The decision continues to face legal challenges from French and Spanish producers. Morocco intercepted 201 migrants in a single boat off the coast of Dakhla this week.

Ankara is closely watching the Moroccan file as an indicator of how the European far right and the information competition surrounding Israel and Russia operate along Europe's African frontier, particularly given Turkey's own history of disputes over migration leverage agreements. The episode has become a live case study in how what appears to be a spontaneous migration wave can be rhetorically weaponised. This has occurred independently of what Spain's own intelligence services can actually establish about who organised it. Allies of Trump described it as an "invasion", Jordan Bardella called it an "unprecedented flood", while Vox described it as "an act of war".

Algeria's military support for Niger reflects a broader rapprochement with the Alliance of Sahel States that predates the mutiny. Meanwhile, Mali's Prime Minister Abdoulaye Maiga visited Algeria this week in an effort to restore high-level talks following tensions over regional security. Algeria helped secure the release of approximately 60 Malian soldiers held by Tuareg rebels and JNIM-linked fighters. Algeria is positioning itself as a Mediterranean anchor for the military-led governments of the AES bloc, whose dependence on Russia is increasingly coming under scrutiny.

Chinese President Xi Jinping arrived in Cairo on 1 September for his first visit to Egypt in a decade. He met President Abdel Fattah el-Sisi, marking the tenth anniversary of their comprehensive strategic partnership established in 2014 and highlighting bilateral trade currently worth approximately \$10 billion.

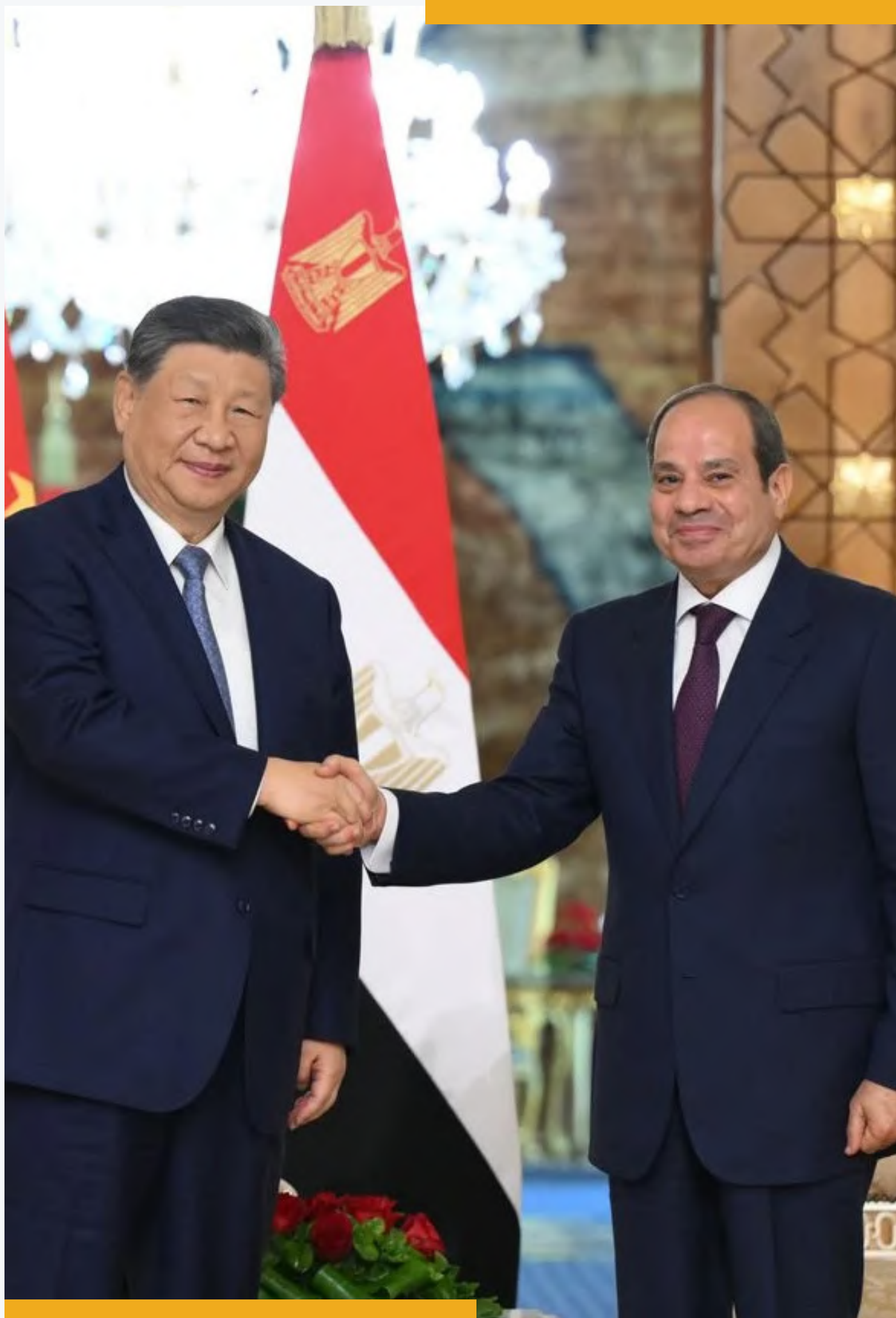
The visit capped weeks of joint air exercises known as "Eagles of Civilization", involving Chinese J-16 fighter aircraft and Egyptian Rafale jets at bases across the country. China's Ministry of Defence said the exercises would conclude in early September. A joint Egyptian-Chinese statement called for Red Sea security to remain primarily the responsibility of the littoral states.

This formulation seeks to reduce the footprint of external naval powers along the corridor. Beijing also supported a \$67 million medical manufacturing facility in Egypt this week. On the financial front, the Egyptian cabinet halted a proposal for domestic debt put forward by a prime ministerial adviser on 31 August.

The proposal would have involved exchanging state assets, potentially including the Suez Canal, in return for reducing the Central Bank's liabilities. The cabinet described any transfer of the canal as "unacceptable" on grounds of national security and sovereignty.

The Cairo-Beijing rapprochement is unfolding against the backdrop of Ankara's post-2023 normalisation with the Sisi government. Even as Egypt deepens military cooperation with a third power, Turkey continues to consolidate its position on issues involving Libya and the Eastern Mediterranean.

EGYPT.



BURKINA FASO.

The internal cohesion of the Alliance of Sahel States appears more fragile at the leadership level than official communiqués suggest. According to a satirical but well-sourced Sahel news report published this week, Captain Ibrahim Traoré privately complained that he learned about Mali's rapprochement with Algeria from the press rather than from Bamako itself.

The report also noted that when Burkina Faso severed its ties with France, neither Mali nor Niger publicly supported the move. Traoré himself had previously condemned Mali's break with Algeria in strong terms, meaning that this one-sided pattern of solidarity weakens the AES narrative of fraternity.

Separately, Libya's state-owned Libyan Foreign Bank filed an ICSID arbitration claim against Burkina Faso on 17 August. The case stems from the nationalisation of Banque Commerciale du Burkina in May 2024.

The dispute concerns a 50-50 joint venture that the government says Libya failed to support adequately, while Tripoli maintains that it fulfilled its obligations.

Uganda's plan to withdraw from Somalia by 2027, combined with the uncertain financing of the AUSSOM mission and the parallel withdrawal of UNSOS, is increasingly being interpreted in the Kenyan press as a sign of growing regional frustration.

Somalia is pursuing a parallel diplomatic campaign against Israel's December decision to recognise Somaliland. The recognition has led to discussions over an intelligence presence at Berbera airport and the possibility of an Israeli military base. Mogadishu is seeking to prevent a broader wave of recognition through 15 Arab and Muslim states, including Turkey.

Ethiopia's national dialogue, which brought together more than 4,000 delegates before concluding on 22 August, approved a proposal to merge the offices of prime minister and president into a single executive presidency. Parliament could consider the proposal when it reconvenes in October. Analyst Befekadu Hailu argues that this could allow Prime Minister Abiy Ahmed to consolidate power following his party's overwhelming electoral victory.

SOMALIA, ETHIOPIA.

KENYA.

Kenya's banking sector saw notable consolidation this week. South Africa's Nedbank cleared the final regulatory hurdle to acquire a 66 percent stake in NCBA Group, with 80 percent of the transaction to be paid in shares. The deal expands Nedbank's East African footprint through one of the region's most profitable banking groups.

US Deputy Assistant Secretary for African Affairs Frank Garcia is visiting Zambia, Ethiopia and Kenya this week to "strengthen key bilateral relationships". The tour follows his July visits to Nigeria, Côte d'Ivoire and Mali and forms part of the State Department's broader effort to secure commercial agreements across the continent.

SOUTH SUDAN.

South Sudan's third Deputy Speaker of Parliament, Kornelio Kon Ngu, announced over the weekend at a National Alliance of Political Parties summit in Juba that he would challenge President Salva Kiir in the December elections. Ngu accused the ruling SPLM of "operating more like an armed group than a traditional political party". The SPLM rejected the characterisation.

The US Embassy in Juba said this week that it recognises South Sudan's "sovereign right" to determine the timing of its elections. This recognition is conditional on the elections being domestically financed and conducted peacefully. The vote will be the country's first election since independence, which explains the carefully limited nature of the endorsement.



DRC, RWANDA AND BURUNDI.

President Félix Tshisekedi's national dialogue initiative, intended to address the war in the east and the fragmented political landscape, was completely rejected by the C64 opposition coalition only days after its framework was announced. Meanwhile, Tshisekedi travelled to Jerusalem on 31 August for his second official visit to Israel, where he held talks with President Isaac Herzog and Prime Minister Benjamin Netanyahu on security, defence, agricultural and technological cooperation. This is a partnership on which Kinshasa is relying as it diversifies its security relationships beyond a weakened FARDC.

TANZANIA.

President Samia Suluhu Hassan swore in former Energy Minister Deogratius Ndejmbi as vice president on 29 August following his unanimous approval by Parliament with 324 votes. At 43, Ndejmbi became one of the youngest people to hold the position in Tanzania.

The appointment represents Hassan's direct response to youth unemployment grievances that have fuelled unrest following the 2025 elections. Ndejmbi replaced Emmanuel Nchimbi, who resigned on 25 August. Nchimbi had been expelled from the ruling CCM on disciplinary grounds less than ten months after taking office.

Moody's maintained Nigeria's B3 rating while upgrading its sovereign outlook to positive on 28 August. S&P had already upgraded Nigeria to B. FTSE Russell confirmed the country's reclassification from Unclassified to Frontier Market status effective 21 September. NGX Group described this as a significant milestone following the rebuilding of reserves to approximately \$44.4 billion as of June after the naira's volatility. Real GDP grew by 4.43 percent in the second quarter, led by services and agriculture.

The government is targeting 4.68 percent growth for the year. None of this has yet translated into improved household conditions. The removal of the fuel subsidy, the depreciation of the naira and persistent inflation, which remained close to 15.4 percent in July, mean that Bola Tinubu is entering the 2027 re-election campaign with stronger headline indicators than lived economic experience. Nigerian commentators themselves have directly pointed to this gap.

Huawei's launch of agentic AI cloud infrastructure and Abuja's \$750 million target for local cloud and data capacity under Project BRIDGE point to a parallel push for digital sovereignty. In this drive, Chinese infrastructure providers currently hold a first-mover advantage over Gulf, Turkish and Western entrants.

Nigeria's diplomatic energy this week was directed toward Southern Africa rather than the Sahel. Vice President Kashim Shettima said at the African Union's 21st Extraordinary Assembly in Luanda that Nigeria would no longer "tolerate" xenophobic and Afrophobic attacks against its citizens in South Africa. The statement came after President Tinubu formally lodged a complaint and called for the issue to be placed on the EU's January 2027 agenda.

NIGERIA.

SENEGAL.

The IMF and Senegal reached a staff-level agreement on 1 September for a \$2.2 billion, 36-month Extended Credit Facility programme. This concludes nearly three years of negotiations that began after the government of Bassirou Diomaye Faye uncovered undisclosed debt that had led to the suspension of the previous IMF arrangement. The agreement came one day after Moody's downgraded Senegal's sovereign credit rating by one notch from Caa1 to Caa2. Moody's attributed the downgrade to the absence of a new IMF programme and rising refinancing pressures. As of the end of 2024, public debt stood at 132 percent of GDP.

Dakar's Finance Ministry simultaneously launched a Debt Treatment Plan under an enhanced G20 Common Framework, while explicitly keeping CFA-denominated debt outside the restructuring scope. This decision protects roughly one-third of the debt stock and preserves the regional market's role in government financing. However, as *ecofinagency.com* noted, the decision also indirectly protects some foreign creditors holding CFA franc bonds through Total Return Swaps. Senegal raised 721 billion CFA francs through this mechanism in 2025.

Senegal's regional diplomacy has also become more strained. The Senegalese army's demolition of a Gambian wall in Bullock in July triggered an almost diplomatic crisis with Banjul. A joint commission is now attempting to clarify the border, which was "roughly" drawn by colonial powers in 1889. Senegal is also facing a local backlash against local beggars. Malian media outlets describe the reaction as reviving xenophobic currents. This echoes the South African pattern on a smaller scale.



Côte d'Ivoire cut its guaranteed farm-gate cocoa price for the 2026/27 main crop season by 57 percent, from 2,800 CFA francs per kilogram in the previous year to 1,200 CFA francs. This effectively halves the typical farmer's income per tonne even as New York cocoa prices reached an 11-month high amid disease and El Niño-related crop risks in both Côte d'Ivoire and Ghana. The Ghana Cocoa Board is indicating a 13 percent decline in production for 2026/27, to 650,000 tonnes.

The first US-Cameroon Bilateral Economic and Trade Dialogue was held in Yaoundé on 27-28 August despite actual 2025 trade amounting to only \$704.6 million and Cameroon remaining excluded from AGOA.

GHANA, GUINEA, CÔTE D'IVOIRE AND CAMEROON.



SOUTH AFRICA.

The more politically charged story concerns migration policy and its economic feedback loop. The trade regulator ITAC raised the sugar import reference price to \$785 per tonne on 28 August. The decision came weeks after producers said the 30 June migrant labour deadline had disrupted harvesting crews. The agriculture and manufacturing sectors each lost 15,000 jobs in the quarter through June. Clothing factories in Newcastle are reportedly operating at CMT rates as low as 11.50 rand per pair of jeans.

Nigerian President Bola Tinubu formally reported recurring xenophobic and Afro-phobic attacks against Africans in South Africa to the African Union on 30 August. Tinubu called for the issue to be placed on the EU's January 2027 agenda after the matter was largely absent from the Luan-da summit's focus on conflict prevention.

The diplomatic complaint sits uneasily alongside South Africa's own 8.5 million unemployed people and a domestic narrative that frames migrant labour as displacing rather than complementing the local workforce.

South Africa also continued its case against Israel at the International Court of Justice. On 29 August, Pretoria submitted an evidentiary dossier documenting Israel's non-compliance with three binding ICJ rulings under the Genocide Convention. Amnesty International called on other states to reinforce this position.

In terms of global positioning, Chinese automakers now account for two-fifths of newly financed vehicles in South Africa. This represents a sharp rise from a negligible share in 2016. The increase demonstrates how rapidly China's consumer and industrial influence is displacing established Western and Japanese suppliers even in Africa's most developed economy.



MOZAMBIQUE.

Mozambique and the United States established a permanent trade and investment dialogue mechanism. The mechanism builds on President Daniel Chapo's 2025 visit to Washington.

An unusual turn took place in domestic governance. President Chapo appointed Waldemar de Sousa as governor of the Central Bank of Mozambique, then reversed the decision within 24 hours and replaced him with Felisberto Dinis Navalha. The presidency described the reversal only as resulting from "emerging issues".

Zitamar linked the reversal to a criminal case reportedly opened against de Sousa in 2020 in connection with the country's hidden debt scandal. Separately, Mozambique's Supreme Court summoned opposition leader Venâncio Mondlane to stand trial on five charges linked to post-2024 election demonstrations. Mondlane and the Anamola party are seeking a live broadcast of the proceedings. The party wants to turn the trial into a public referendum on the disputed election itself.

Angola hosted the African Union's 26th Extraordinary Executive Council and 21st Extraordinary Assembly sessions in Luanda on 29-30 August. President João Lourenço presided in his role as the AU's champion for peace and reconciliation. AU Commission Chairperson Mahmoud Ali Youssouf used the meeting to push for an "urgent" overhaul of the bloc's peace and security architecture.

Youssouf identified Sudan, eastern DRC, Somalia, the Sahel, Libya, northern Mozambique and Madagascar as crises that are putting pressure on a system the AU wants to finance through a genuinely functional Peace Fund. The AU seeks to reduce dependence on external financing through this mechanism, but the objective is further complicated by the US plan to end UN logistical support financing for the AUSSOM mission in Somalia.

National carrier TAAG added 57 Brazilian destinations through a LATAM codeshare partnership. This forms part of a strategy to position Luanda as an Africa-South America aviation hub.

ANGOLA.



ZAMBIA.

Hakainde Hichilema was sworn in for a second term in Zambia on 2 September. His rival Brian Mundubile remains in prison on treason charges that he denies, despite receiving 38 percent of the vote in the 13 August election. African observers and Zambian civil society described the outcome as damaging to the “democratic reputation of the copper-rich country”.

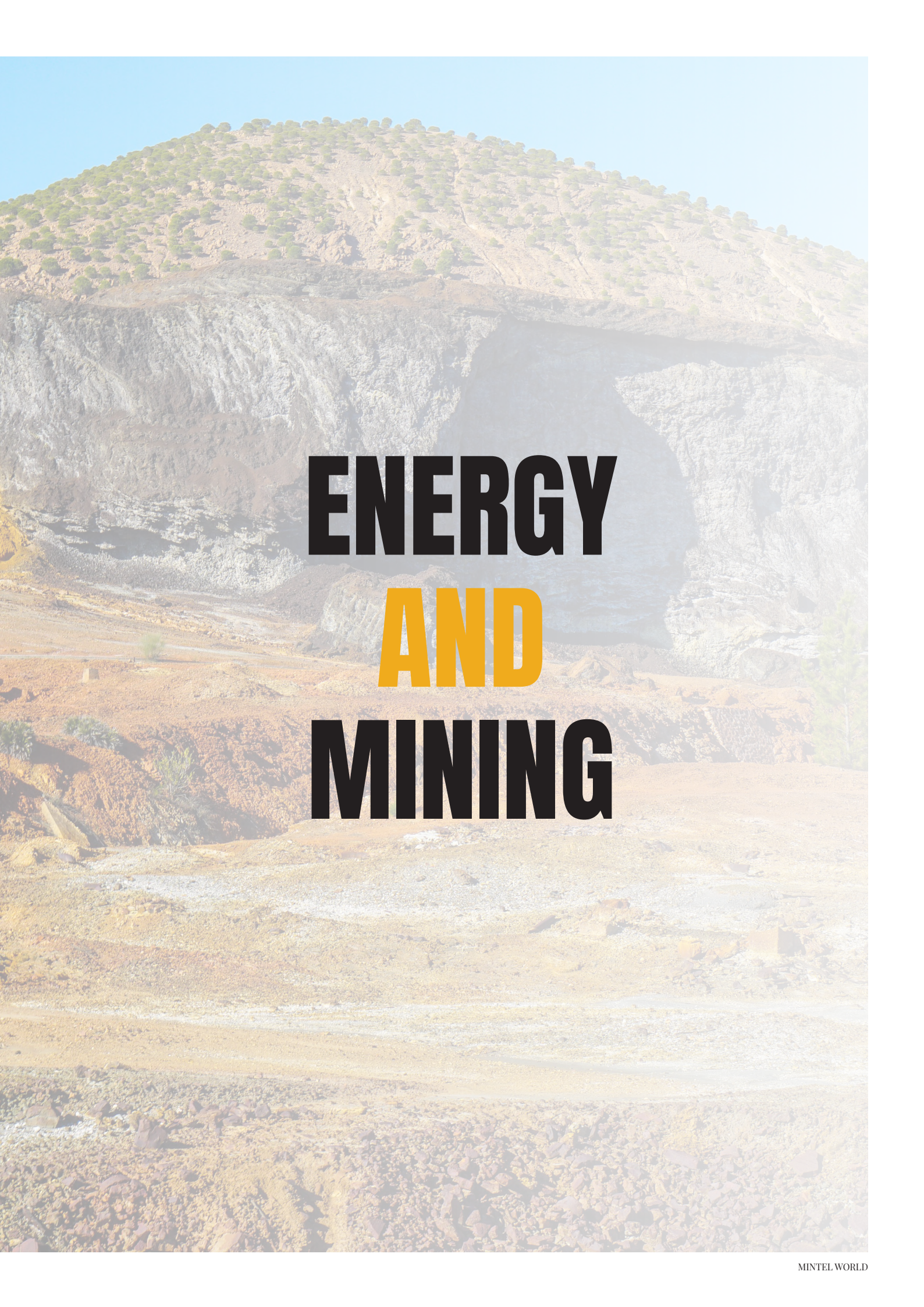
The Zambia leg of US Deputy Assistant Secretary for African Affairs Frank Garcia’s Africa tour is explicitly aimed at recalibrating Washington’s relationship with a Lobi-to Corridor partner that has clashed with the Trump administration. The relationship is reportedly being shaped around the pursuit of preferential access to minerals.

BOTSWANA/ GABON.

Botswana is attempting to contain an outbreak of foot-and-mouth disease. The outbreak has closed access to the EU fresh beef market across all previously authorised export zones and directly threatens a sector that generated 2.36 billion pula in exports between 2020 and 2025.

Gabon, where the Bongo family’s assets remain under scrutiny and which is governed by President Brice Clotaire Oligui Nguema, launched “Gabon Infini” with The Nature Conservancy. The initiative is a \$200 million, ten-year conservation and rural development financing mechanism.





ENERGY AND MINING

Algeria, Egypt

Sonatrach has moved beyond the exploration phase into field development at the Bilma oil block in Niger. Nigerien authorities say the field could produce more than 20,000 barrels per day for two decades.

Sonatrach also signed a memorandum of understanding with China's Sinopec in Beijing this week as part of a \$60 billion energy investment programme. The programme is drawing Chinese oilfield services companies such as Anton toward Algeria as their business in Iraq weakens. Algeria remains an important gas supplier for Turkey as well.

The larger structural story is the reshaping of Egypt's upstream gas sector. UK-based Energean is in exclusive talks for approximately \$1 billion worth of BP's Egyptian assets. These include BP's West Nile Delta fields and its 50 percent stake in the Temsah concession, which contains the newly discovered Denise West field with estimated gas resources of 2 trillion cubic feet. BP is retaining its stake in the giant Zohr field through its Arcius Energy joint venture with Abu Dhabi's ADNOC. This forms part of a broader debt-reduction effort. Energean, meanwhile, is diversifying away from Israel's Karish field, which saw quarterly revenue fall by 29 percent following a 41-day shutdown this year.

Uganda

President Yoweri Museveni presided over the naming of Uganda's crude oil grade at the Kingfisher production facility on the shores of Lake Albert on 2 September. This is the final procedural step before the country's estimated 6.5 billion barrels of oil in place, of which 1.4 to 1.7 billion barrels are recoverable, can be priced, marketed and shipped by international refiners. The CNOOC-operated Kingfisher field and TotalEnergies' Tilenga project are jointly expected to produce 230,000 barrels per day at peak production.

The output will be transported to Tanga on Tanzania's coast through the 1,443-kilometre East African Crude Oil Pipeline. The pipeline is now more than 90 percent complete, with first oil still targeted before the end of the year. This follows the 2022 Final Investment Decision that unlocked approximately \$15 billion in investment.

ACCORDING TO NIGERIEN AUTHORITIES, THE FIELD IS EXPECTED TO PRODUCE OVER 20,000 BARRELS PER DAY FOR 20 YEARS.



Tanzania

Tanzania has become locked into a simultaneous infrastructure competition with Kenya. Italian financial media this week linked the rivalry to a diplomatic rupture. Kenyan President William Ruto reportedly unilaterally designated Tanga in Tanzanian territory as the location for the Dangote refinery without consulting President Hassan.

The project eventually shifted to Kenya's own \$17 billion, 700,000-barrel-per-day Lamu refinery. This prompted a Tanzanian response. In early August, Tanzania signed a competitive \$20 billion memorandum of understanding with Uganda and trading giant Vitol Bahrain for a Tanga hub directly connected to the East African Crude Oil Pipeline.

The rivalry draws on a decades-old contest for regional primacy dating back to independence. It is now being played out through parallel multibillion-dollar energy and logistics investments along both countries' coastlines. Kenya's Lamu project has attracted environmental objections from Swahili coast activists even as the Nairobi government promotes it as a crown jewel of national infrastructure.

Nigeria

The oil and gas sector remains the structural anchor of Nigeria's macroeconomic recovery. According to Industrial Info Resources, Nigeria is positioned to capture \$30-50 billion of the continent's \$221 billion oil and gas investment pipeline through 22 offshore projects by 2030.

Meanwhile, Dangote Petroleum Refinery's threat to restrict petrol sales to importer-distributors reflects a domestic refining sector that is now asserting market power in response to the 207 percent surge in petrol imports between May and June.

South Africa

Eskom doubled its annual net profit to 30.3 billion rand (\$1.9 billion) in the year to March. This marks its second consecutive profitable year after eight straight years of losses. Improved plant availability has ended load shedding and reduced diesel expenditure by 10.6 billion rand. Electricity Minister Kgosientsho Ramokgopa backed board chairman Mteto Nyati remaining beyond the end of his term in October.

Business Leadership South Africa and Eskom jointly endorsed the establishment of an independent Transmission System Operator with 110 billion rand in grid assets, even as they continue to disagree over implementation.

Municipal debt arrears of 111.6 billion rand could rise to 358 billion rand by 2031. This debt overhang remains the central vulnerability of the recovery, alongside a 6.2 percent decline in electricity sales as industrial demand weakens and self-generation expands. Anglo American, Sibanye-Stillwater and Exxaro are all now pursuing power purchase agreements, wheeling arrangements and direct solar generation to reduce their dependence on Eskom.

Sudan, Mozambique, Namibia, Angola

US institutions are already financing Mozambican LNG and ExxonMobil holds a stake in Rovuma LNG. This framework will become more important as security conditions stabilise in Cabo Delgado. The long-awaited Mozambique-Malawi 400kV interconnector was commissioned on 8 August. This represents a concrete step toward integrating Malawi into the Southern African Power Pool through Mozambique's grid.

Angola-based Etu Energias signed a \$260 million deal with Chevron subsidiary CAB-GOC to acquire a 31 percent working interest in offshore Block 14 and a 15.5 percent interest in Block 14K. Once regulatory approval is finalised, the agreement will make Etu the majority stakeholder and operator, with part of the transaction financed through a Shell Western Supply and Trading credit facility. The African Energy Chamber explicitly welcomed the deal as a step toward greater African own-

ership of the continent's own energy resources. Angola's Oil Minister Diamantino Azevedo said the government now regards production above 1 million barrels per day as a baseline rather than an aspiration. Recent projects by TotalEnergies and Azule Energy are helping stabilise output after years of decline.

Namibia's petroleum ministry began direct cooperation talks with Libya's National Oil Corporation on the sidelines of Norway's ONS 2026 conference.

Sudan's gold economy in Darfur is fed by RSF-controlled mines, including Jebel Amer, which are linked to the Al-Junaïd conglomerate of the Dagalo family and operate through smuggling routes extending into the Central African Republic and beyond. This economic geography directly overlaps with the UAE, Chad, southeastern Libya and Puntland corridor through which the RSF's foreign supply networks are being tracked.



DRC, Rwanda and Burundi

A comprehensive regional analysis published this week argues that the Great Lakes crisis is best understood as a form of state capture. The FDLR, a Hutu militia organisation whose chain of command dates back to the 1994 genocide, has become so deeply embedded within FARDC units, Wazalendo militia formations and Burundi's CNDD-FDD security apparatus that Kinshasa and Bujumbura now depend on it to fight AFC/M23.

The analysis describes this as a “hostage” relationship that no government can easily reverse. The FDLR draws its own resources from eastern Congo's gold, cassiterite, coltan and coal economies, which resemble the illicit economies seen in Darfur. This gives the group the means to sustain a political project without becoming entirely dependent on external patrons.

Nigeria, Cameroon, Guinea

China is now seeking to replicate the Simandou financing model in Nigeria. A Chinese-linked buyer has agreed to acquire the Agbaja iron ore project for \$5.67 million. This signals Beijing's intention to extend its raw-materials-to-steel strategy beyond Guinea into West Africa more broadly.

In Cameroon, meanwhile, the ongoing takeover battle for Canyon Resources, which controls Minim Martap, one of the world's richest bauxite deposits, continues to complicate financing for the country's first industrial-scale bauxite mine.

Guinea's Simandou iron ore project moved this week from promise to operational reality. First shipments are now reaching global markets through the new Morebaya port. Rio Tinto's SimFer subsidiary appointed Kox Gomba as its new managing director.

BMI forecasts that Simandou could push annual output to 120 million tonnes and become the “main driver” of global iron ore growth by 2030. Separately, Asara Resources increased the resource estimate for its Kada gold project by 125 percent to 2.08 million ounces.



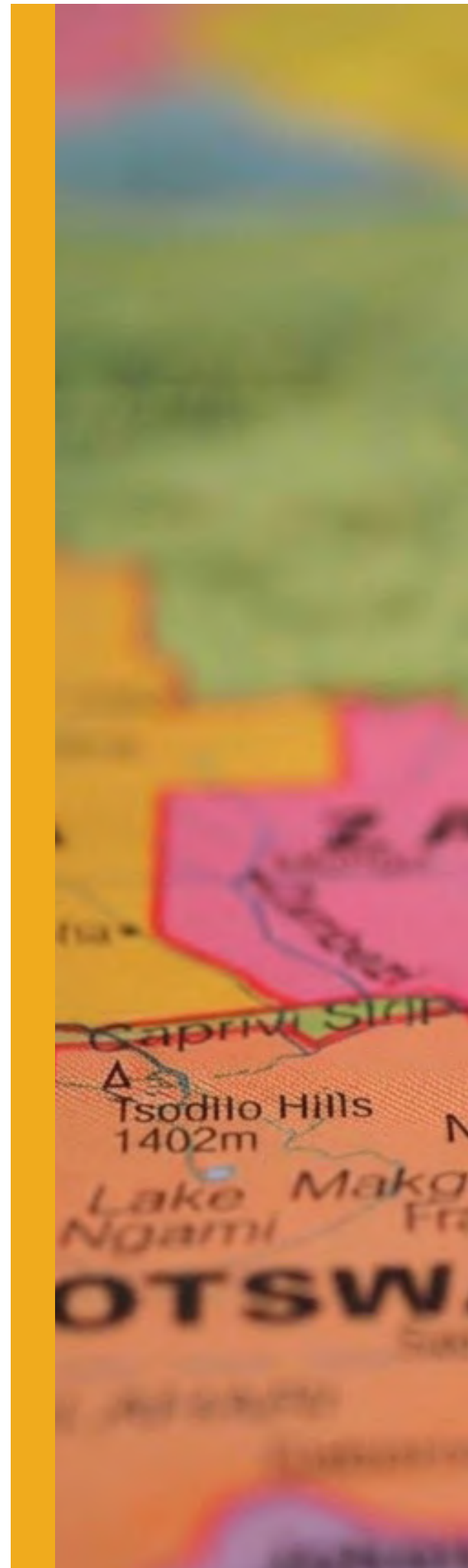
Zimbabwe, Namibia, Botswana, Zambia

Zimbabwe's platinum sector attracted new financing commitments. Tharisa is issuing an initial \$300 million five-year bond to complete financing for the \$545 million Karo Platinum project. Valterra Platinum's Unki mine passed its first renewal audit under the Initiative for Responsible Mining Assurance standard. Rockwell Automation is helping modernise the Mimosa platinum group metals mine. Namibia's Uis project, operated by Askari Metals, is advancing toward drill-ready pegmatite targets for tin, tantalum, lithium, rubidium and caesium. Elevate Uranium's Marenica project reported 79 percent uranium recovery from its U-pgrade pilot plant.

In Botswana, Epiroc won a major equipment order from Chinese Minmetals-backed MMG for the expansion of the Khoemacau copper mine.

India's Ministry of Mines held preliminary talks with Zambian officials on 26 August to restart stalled discussions on copper investments. This forms part of New Delhi's search for 50 overseas critical mineral assets by 2031 under the National Critical Mineral Mission. The mission also targets Malawi, DRC, Zimbabwe, Mozambique, Mali, Morocco and Côte d'Ivoire.

State-controlled ZCCM Investments is meanwhile considering a share sale to meet Lusaka Securities Exchange listing requirements. This would partially open Zambia's equity stakes in copper mines to new capital.





STRATEGIC SYNTHESIS



CONCLUSION

The week's material resists a single narrative, but converges around a recurring structural tension. African states are simultaneously becoming more attractive to external capital while possessing less capacity to guarantee the security or governance conditions on which that capital ultimately depends. Nigeria's reclassification to Frontier Market status, Angola's consolidation of operatorship in its own oil blocks and Zambia's progress on debt restructuring all represent genuine institutional achievements.

Yet each sits, sometimes within the same news cycle, alongside evidence of entrenched insurgency, contested elections or dependence on external security guarantors whose interests do not always align with those of the host government. For Turkey, whose African engagement relies heavily on defence industry exports and maritime cooperation in the Horn of Africa, this week's anti-piracy operation in Somalia and the ASELSAN exhibition in South Africa demonstrate real capacity. However, the near-total absence of Turkish capital from this week's critical mineral transactions, compared with active Indian, Chinese, Gulf and American positioning, shows that Ankara is competing on a narrower front than the states that are actually delivering the largest strategic openings.

Globally, the critical minerals contest has moved from implicit to explicit. India's Ministry of Mines named seven target countries. Washington's own diplomats de-

scribed a tour in terms of “preferential mineral access”. China visibly exported a successful financing template from Guinea to Nigeria within the same reporting window. Taken together, these three developments indicate that the era of quiet resource diplomacy in Africa has effectively ended.

The contested question is no longer whether external powers will compete for African copper, lithium, platinum and iron ore. The central question is which African governments will succeed in converting that competition into local processing capacity, employment and fiscal leverage rather than merely hosting extraction on someone else’s terms. This week’s Simandou shipments and Etu Energias’ operatorship in Angola suggest that a small group of states are beginning to manage this process. Most remain at the earlier and more extractive stage of the relationship.

Meanwhile, the security picture across the West African and Sahel corridor offers little basis for optimism, regardless of which external guarantor a government currently prefers. Niger’s dependence on Russian forces to suppress a domestic mutiny overlaps with Algerian arms deliveries and a jihadist threat that predates both relationships. This demonstrates that external security partnerships are treating the symptoms of state fragility rather than its underlying causes.

Nigeria’s own experience demonstrates the same point on a larger scale. In the same states where military operations report the killing of thousands of militants, farmer-herder violence, mass kidnappings and a functioning ransom economy continue largely unabated month after month. Resource wealth and security fragility do not merely coexist across the countries covered by this brief. In Nigeria’s Plateau State, Mozambique’s Cabo Delgado and the Sahel’s mining corridors, armed groups are increasingly targeting the mines, roads and communities that enable resource extraction, creating causal linkages between the two. This convergence will shape which governments can turn this week’s investment headlines into durable state capacity and which cannot.



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