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## BULLETIN

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# EDITOR'S NOTE

Developments this week demonstrate that escalating geopolitical tensions, new military tools shifting the balance of power, and resource nationalism are decisive across Africa. The widespread use of cheap unmanned aerial vehicles (UAVs) in conflicts across Ethiopia, Sudan, the DRC, and the Sahel region has shortened the distance between frontlines and capitals, deepening mutual accusations among regional actors and intensifying diplomatic crises. Simultaneously, the strategic struggle for influence among the US, China, and Gulf states over the continent's mineral, energy, and healthcare infrastructures is accelerating, while steps such as gold refining in Burkina Faso, petrochemical complexes in Kenya, and raw material restrictions in Zimbabwe and Ghana highlight a drive to increase local processing capacity. However, public finance constraints, supply chain disruptions, and the presence of informal networks continue to keep a wide gap between proclaimed sovereignty moves and actual implementation capacity on the ground.

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# CONFLICT AND WAR

# ETHIOPIA AND ERITREA

Last week's rupture was sealed by the TPLF's declaration of «all-out war». This week it turned into a front that extends beyond the country's north. On 20 September the TPLF, the Amhara Fano movement, the Oromo Liberation Army and four other groups united under the name «Ethiopian People's Forces Survival Alliance». They declared that their goal is to overthrow the government of Abiy Ahmed and set up a transitional administration. The alliance made its first move on 22-23 September. Tigray forces seized three airports in the region, including Alula Aba Nega in Mekelle, and Ethiopian Airlines suspended its flights to the region. In the same days a ground assault on federal positions began in Amhara together with Fano, and the pro-government Tigray Peace Force was targeted on the Afar border. At the end of the week the TPLF took the town of Erebti in Afar and announced control of three settlements. The direction of the attack was chosen so as to threaten the main supply road linking Addis Ababa to Djibouti.

The federal army responded with a counteroffensive. Alamata, 120 kilometres south of Mekelle, fell to government forces and allied militias. As of 30 September federal troops were reported to have advanced more than 150 kilometres inside Tigray, retaken Mekoni, Wajena and Adi Gudom, and come within about 39 kilometres of Mekelle. Civilians paid the price of this advance. According to hospital sources, at least 52 civilians died in three days of fighting around Alamata. Twelve of them were killed in a single strike that hit the town market. Doctors Without Borders said the number of war-wounded arriving at Korem and Alamata hospitals rose from 180 to more than 420 in 48 hours between 22 and 25 September. It added that more than 300 wounded reached Suhul Hospital in Shire and that over 700 wounded were admitted across Tigray. The organisation suspended its work at Alamata Hospital for security reasons. Internet

and telephone services were cut in the region, and fighting was also recorded near Lalibela.

The development that changed the nature of the war took place in the capital. On 30 September the National Intelligence and Security Service declared an indefinite ban on unmanned aerial vehicles in and around Addis Ababa. A day earlier a deadly drone attack had been reported on the Air Force headquarters in Bishoftu. After the ban, explosions were heard at night in the west of the city, in Torhayloch near the general staff building and in Gotera, where intelligence facilities are located. Fighters affiliated with the opposition claimed the attacks. A diplomatic source said the explosions at the army headquarters were most likely caused by drones. In the 2020-2022 war the front never reached the capital. This time the alliance showed that it has brought the government's most protected infrastructure within range using cheap aerial vehicles.

Regionalisation now operates as a chain of official accusations rather than as a risk. Chief of General Staff Field Marshal Birhanu Julia claimed that the alliance was pushed and equipped by Sudan, Egypt and Eritrea. All three capitals rejected the accusation. On 1 October Addis Ababa closed its embassy in Asmara and forced ten Eritrean diplomats to leave the country within 48 hours. Eritrea cut relations entirely the same day. The two countries thus returned to the level of hostility seen during the twenty-year military standoff that ended in 2018. In the previous war Eritrea and Fano fought alongside the federal government against the TPLF. Today both stand on the opposite side. This reversal is the direct result of the fact that the disarmament and territorial status provisions of the Pretoria Agreement were never implemented (for the diplomatic dimension, see the DIPLOMACY section).



# SUDAN

The balance around El Obeid broke in the army's favour this week. The Sudanese army and the Joint Force, made up of Darfur's former rebel movements, captured Sodari in North Kordofan on 25 September and El Mezroub in West Bara on 2 October. According to military sources only Umm Badr and Hamrat El Sheikh remain in RSF hands in the state, and the army is preparing to declare the state fully cleared. The siege of El Obeid, watched for weeks with the question «will it fall», has thus been reversed. The capture of Sodari was not without a shadow. Local sources reported that about 17 prisoners who had surrendered and were wounded were killed on the day the town was entered. Defections from RSF ranks also continued. A commander named Tayyib al-Wahidu arrived in Omdurman with about 50 fighters and five armed vehicles and joined the army.

The RSF is trying to make up from the air for the ground it lost on land. On 27 September drones struck the Umm Alila fuel depot east of Wad Madani, and a large fire broke out at the depot that supplies the centre and east of the country. On the morning of 28 September the northern neighbourhoods of El Obeid suffered the heaviest air attack of recent times. According to the Sudan Doctors Network, five people were killed and more than 45 wounded in the attack on the student dormitory of the University of Kordofan. On the evening of 30 September the Sheikan dormitory housing displaced people was hit and 26 people were wounded. The UN Office of the High Commissioner for Human Rights documented 15 drone attacks and at least 45 civilian deaths in and around El Obeid. The army uses the same tool. A Libyan officer advising the RSF was reported killed in an air strike on Umm Badr. The UN Panel of Experts on Libya had previously recorded that the Subul al-Salam Battalion in Kufra facilitated the passage of fuel, weapons and foreign fighters to the RSF.

The spillover of the war into neighbouring countries became visible in Chad. N'Djamena regarded the air strikes carried out in recent days on the eastern Ennedi region as a violation of its territorial integrity. From the UN rostrum it announced that it will take every measure recognised by international law if they are repeated. Chad had held the Sudanese army responsible for the 20 August strike on a convoy 100 kilometres inside the border. The same week in Malawi, former Chief of General Staff Paul Valentino Phiri was arrested on allegations of facilitating illegal arms shipments in June and July 2025. An investigation published in the country had claimed, based on US intelligence, that Malawian officers acted as intermediaries in delivering heavy weapons to Sudanese rebels. The supply chain extends deep into Southern Africa. This explains why an arms embargo limited to Darfur does not work.

The economic front is getting heavier. The Sudanese pound again passed 8,000 on the parallel market, and on 29 September fuel queues returned in Khartoum and many states. A gallon of petrol sells for 37,000 pounds at the station and 60,000 pounds on the black market. The Central Bank announced that it will withdraw old 500-pound banknotes from circulation in Kordofan and Darfur within three months from 1 October. The step aims to render worthless the cash stock in RSF areas. Meanwhile the 23 gold companies that threatened last week to halt production in October got what they wanted. The Central Bank granted producers the right to sell directly to exporters and to hold their foreign currency earnings for 21 working days (see the MINING section). The humanitarian picture is deteriorating regardless of these negotiations. At least 30 children died of malnutrition in Suni, east of Jebel Marra, and the rainy season failed across Darfur. The Port Sudan administration decided to keep the Adré border crossing open until the end of the year.



# SOMALIA

Baidoa became a battlefield for the third time in six weeks. On the morning of 28 September thousands of fighters loyal to Abdiiaziz Laftagareen entered the city. Laftagareen is the former president of South West State who was removed by federal forces in March. As in earlier attempts, the attack began with a vehicle laden with explosives. A drone carrying explosives was also used, and a hotel and civilian areas were damaged. Doctors Without Borders reported that 69 wounded, five of them children, were treated at Bay Regional Hospital and that three people died. It said the real number may be higher because roads are closed. The first wave on 17 August had left 94 wounded and the second wave on 3 September had left 71. Both sides declared victory. The federal defence minister called the attackers «terrorist twins», putting Laftagareen's forces in the same category as Al-Shabaab. The Laftagareen camp rejected this claim.

Addis Ababa was reported to be planning to withdraw its more than 3,000 troops from Somalia because of the war in the north. Mogadishu said it had received no such notification. The area where Ethiopian troops are most concentrated is precisely South West State. If this gap is added to AUSSOM's funding uncertainty, the Baidoa line becomes the hardest front for the federal government to hold.

Operations against Al-Shabaab continued through a separate channel. The intelligence agency NISA announced on 26 September that it killed

12 members of the group at Buur-Saruur, two kilometres southeast of Ali-Gaduud in Middle Shabelle. AFRICOM carried out air strikes on 24 September around Qumbi, 90 kilometres northwest of Kismayo, and then at Welmaro and Cali Faarax near Jilib. Washington's main concern, however, is the group's Yemen connection. US officials said the Houthis sell weapons to Al-Shabaab and have trained hundreds of fighters in the use of drones and explosives. They said this partnership provides a foothold on both shores of the Gulf of Aden at once. The Houthis took the port of Mokha this month and advanced towards Bab el-Mandeb, which makes the warning concrete.

The piracy picture produced one success and one scandal in the same week. The Puntland Maritime Police rescued the tanker Sibu 1 on 25 September and detained 41 people. Twenty-eight of the suspects escaped during a night transfer from Garacad to Garowe. Security sources suspect that local police turned a blind eye to the escape. On 29 September the MT Honour 25 was rescued off Bandar Beyla. The vessel had been hijacked in April with 17 crew and 18,500 barrels of product. Before the operation the pirates had killed five seafarers, three of them Pakistani, one Indian and one from Myanmar. The International Maritime Organization has counted at least 15 attacks since April, the highest level since 2013. The pirate network finds protection within the local community and law enforcement. This shows that the problem cannot be solved by naval power.



# DRC AND RWANDA

Positions changed hands throughout the week along the Masisi and Walikale line. Reinforced from Ngungu, the AFC/M23 retook the centre of Remeka in the Ufamandu 1 groupement from the FARDC and wazalendo militias on the evening of 25 September. The next day it attacked positions at Kaleta and on Miko hill. Government forces responded around Mindjendje and by 28 September had recaptured the hills of Kukibingu, Kahongoboka, Tchad, Bubolwa and Luola. The new element of the fighting was its air dimension. On the morning of 28 September wazalendo positions in Kaleta and Bitoyi were hit by drone. The same day at around 9 a.m. the FARDC position at the airfield of Pinga, the strategic centre of Walikale, came under drone attack for the first time. Schools in the town were evacuated. The Nyabiondo-Kashebere-Mungazi road has been closed since 24 September. MONUSCO head James Swan told the Security Council that the AFC/M23 retains control over a large part of North Kivu and that both sides continue to use heavy weapons and drones.

A crack also appeared within the movement itself. On the night of 26 September, hours-long clashes between AFC/M23 factions in Burungu, in Masisi's Bashali Mokoto groupement, killed nine people according to local sources. The cause of the clash was not disclosed. The parallel administration, meanwhile, continues to institutionalise. The movement closed 80 of the 113 higher education institutions in the area it controls for the 2026-2027 academic year on the grounds that they were «not viable». A month earlier Kinshasa had suspended the activities of about ten universities whose boards the AFC/M23 had appointed. The same students now face closure decisions by two separate authorities. The «parallel administration» complaint that Kinshasa voiced at the Security Council has turned into a rival regulatory authority on the ground.

In Ituri a front independent of the M23 crisis is heating up. CRP militias loyal to Thomas Lubanga attacked a FARDC position in Nyampala, Djugu, on 27 September, and after being repelled they clashed with CODECO. According to security sources 16 militiamen were killed and 3,100 civilians took refuge at the MONUSCO base in Rhoo. A week earlier the same group had abducted about twenty people, including six Chinese nationals. The army regarded the CRP's unilateral ceasefire as a sham and announced a large-scale operation. In Mambasa the ADF carried out a night raid on the village of Bandisende.

This security environment overlaps with the worst Ebola outbreak in the country's history. According to government data, 8,300 confirmed cases and 4,018 deaths had been recorded in seven provinces as of 2 October. The outbreak trails only the 2014-2016 West Africa epidemic. The response is being met with violence. Marie-Celestin Karondwa, the Butembo official of the ruling UDPS party, was beaten to death on 27 September after explaining protective measures on the radio. On 1 October an eight-bed Ebola transit centre was burned at the Kigonze displaced persons camp in Bunia. Thousands of people left the camp after soldiers entered it to search for weapons. G20 foreign ministers pledged more than 470 million dollars in new funds for the outbreak, of which 267 million dollars came from the US. On 25 September a plane crashed in Kenge, the capital of Kwango, killing 17 people. The dead included Lieutenant General Joseph Mutombo Katalayi, First President of the High Military Court, and Lieutenant General Lucien-René Likulia, Chief Prosecutor of the FARDC. The government declared three days of mourning and suspended the certificate of the carrier, Tracep Congo Aviation.



# MALI, BURKINA FASO AND NIGER

In Mali, Russia's Africa Corps was a direct target for the third week in a row. On 28 September JNIM ambushed a military convoy between Tiemaba and Wewo, north of Niono. The vehicles were first hit by drone, then fighters entered the area and recorded footage. The group announced that seven Russians were killed or wounded, two vehicles were destroyed and two DJI drones were captured. Local sources confirmed that at least four Russian soldiers were killed. The General Staff made no mention of the ambush. It said that a day earlier it had struck a hideout 13 kilometres east of Niono in the same area. The Africa Corps, for its part, reported that about 30 militants were killed in a joint operation with the army in the Ségou region. The three accounts do not match. More striking is that the Dioura camp, where heavy losses were suffered on 10 September, has still not been reoccupied three weeks later. On 28 September the army limited itself to striking four points around the camp from the air.

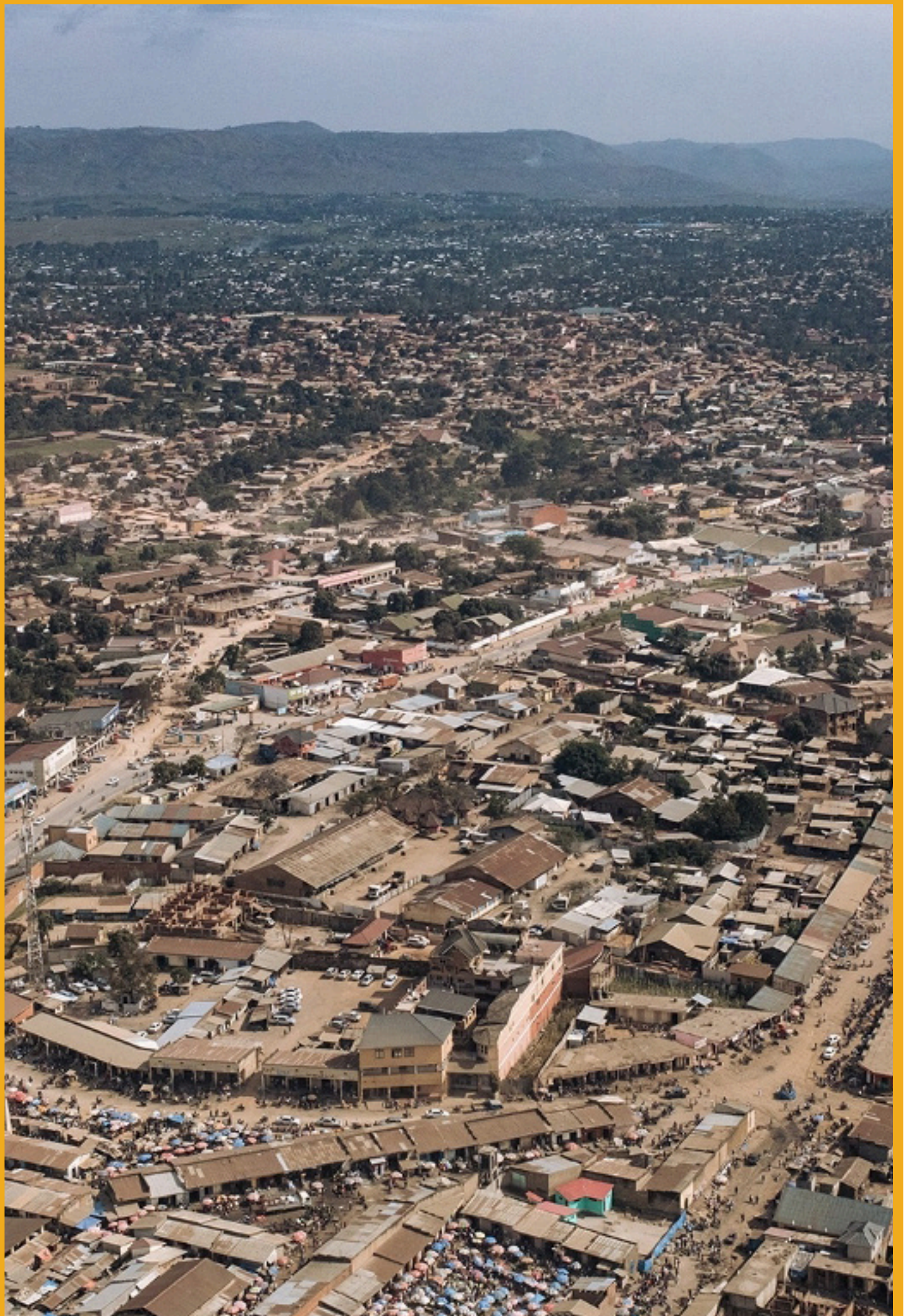
Bamako is trying to balance with air power the ground it has vacated on land. Under Operation Dougoukoloko, two hideouts east of Kidal were struck on 21 September. Positions north of Dandougou where 200-300 fighters had gathered were hit on 24 September. Assembly points 45 kilometres northeast of Abeïbara were struck on 26 September. The General Staff said that at least 50 people, including leaders, were killed in the last strike. It added that a logistics depot northwest of Kidal and a meeting point 60 kilometres northwest of Léré were also targeted. The Malian press wrote that Abdoullahi Ag Faly, one of JNIM's senior cadres, died in these strikes. In the same days JNIM claimed improvised explosive device attacks near Douentza and on the Bla-Ségou and Tamani-Baroueli roads. It also claimed a raid on the barracks at the Djenné junction in which two soldiers were killed and five vehicles and a drone were captured. The army maintained that dozens of attackers were killed in the same clash. In the north, the Azawad Liberation Front attacked army and Africa Corps positions in Goundam with kamikaze drones on 29 September.

The report published by Amnesty International on 29 September documented the civilian cost of this air and ground campaign. According to the

report, the Malian army and Wagner personnel killed at least 34 civilians in seven incidents in the Ségou, Mopti and Timbuktu regions between 2023 and 2025. None of the victims was taking part in the fighting, and some were executed after being detained. Those targeted were mainly Fulani, Arab and Tuareg herders. Torture methods such as electric shocks and simulated drowning were recorded at military facilities. The social cost of the war can also be read in school data. In the school year that began on 1 October, more than 2,400 of the country's 11,860 schools are closed and 733,000 children are deprived of education. In Kidal 84 percent of schools are not functioning. Ségou has the highest number of closed schools, at 506.

In Burkina Faso JNIM maintained its pattern of widespread and simultaneous raids. The group announced that it had captured VDP posts in Aoréma, in Solle in Loroum and in Segouena, and army positions in Ouahigouya and Kalo. It claimed that five soldiers were killed in an attack on three military posts in Niangado, Tougouri and Pensa. It also claimed the killing of one soldier in Tenkodogo, one soldier in Koulpelogo and two VDP members in Dédougou. On 27 September, ahead of the fourth anniversary of his rule, Ibrahim Traoré gave a long interview. He claimed that many settlements in border areas had been retaken. He also claimed that the RN1 highway and the roads linking Ouagadougou to Koudougou and Bobo-Dioulasso had been secured. The return of the population to retaken areas still takes place under the supervision of the security forces. That is an admission of how fragile this gain is.

Niger suffered the heaviest single loss of the week. Islamic State Sahel Province claimed an ambush on a gendarmerie convoy near Abala-Filingué on 23 September and an attack on Birni-N-Konni in the Tahoua region on 26 September. Security sources reported that total losses exceeded 50 and that more than 30 soldiers died in Konni alone. In its own statement the group claimed that 39 soldiers were killed. Tiani replaced the chief of general staff after the Base 101 mutiny, but this did not remedy the army's fragility in Tillabéri and Tahoua. In the north, 50 kilos of cocaine worth 2.5 billion CFA francs were seized in an operation in Arlit, near the Algerian border. The growth of the cocaine flow along the Saharan route shows that a second item has been added alongside gold in the financing of armed groups.



# NIGERIA

In the northeast, violence against civilians did not slow down while ISWAP was shaken by internal division. On the evening of 30 September, 18 people going to their fields and to collect firewood were ambushed in the Marte area of Borno, and 15 bodies were found. On the night of 25 September the army repelled an attempt to infiltrate the Kawuri forward operating base in Konduga. In the same area the 222 Battalion received the surrender of 43 members of ISWAP families who fled the camp at Yuwe during clashes between JAS and ISWAP. Between 19 and 25 September another 17 people surrendered to the army in Dikwa, Bama and Ngala. Behind this flow lies a rupture within the group. Yaku Buduma commands ISWAP's Buduma unit, which numbers more than a thousand and knows the islands and channels of Lake Chad. On 25 September he clashed with the group and left it in order to free relatives whom the leader Ba Shuwa had had arrested. Ba Shuwa replaced Mainok, who was killed in a joint Nigeria-US operation in May. Since then he had been purging cadres he suspected of preparing to surrender. ISWAP nevertheless announced that it executed a militia member in Monguno and killed two people in an ambush on a patrol between Logmani and Ngala. Hadin Kai forces killed 16 militants in Adamawa on 30 September and 1 October, and lost three soldiers while repelling attacks in Garkida and Garaha.

The kidnapping economy operated in three separate regions at once during the week. On 26 September, 47 farmers harvesting groundnuts, most of them women, were abducted in the Mariga area of Niger State. The attackers are demanding two million naira per person, and one of the abductees gave birth in captivity. The next day 40 women were taken in Zamfara. On the morning of 1 October two

buses coming from Ibadan were stopped on the Owerri-Onitsha road in Imo. The passengers, who included 19 university graduates heading to mandatory youth service, were abducted, and ten people were rescued. The House of Representatives called for the rescue of 116 schoolchildren, including 44 students from Mussa held captive in Borno for more than 138 days. For those abducted from four mosques in the Borgu area of Niger State on 21 August, communities released 547 names. The governor dismissed this figure as «social media exaggeration» and spoke of 63 people. Defence Headquarters announced that 367 attacks were recorded in the third quarter, 554 people were killed and 1,736 hostages were rescued. The army established three new infantry battalions in Zamfara, in Bakura, Kaura Namoda and Anka.

The trust problem within the security apparatus itself has not been closed either. The military court trying officers accused of plotting to overthrow the Tinubu administration postponed its verdict for the fourth time and set it for 5 October. On the 1 October independence day the government did not hold the traditional military parade for the second year in a row. Washington, for its part, is deepening the partnership. The US announced that it supports Nigeria's purchase of 12 AH-1Z Viper attack helicopters. The commander of the US Army's Africa task force discussed joint special forces training, intelligence sharing and countering improvised explosive devices in Abuja on 30 September. The Multinational Joint Task Force in the Lake Chad basin has a funding gap, and 72 percent of the regional burden falls on Nigeria. This explains why this bilateral support has become indispensable. On 29 September in Minna, thousands of young people gathered on a rumour that money would be distributed at the governor's residence. At least three people died in the stampede that broke out among them.



# SOUTH AFRICA

Mass shootings in three cities within one week killed 38 people. On the night of 26 September eight attackers armed with AK-47s sprayed a tavern with gunfire in Wedela, 80 kilometres southwest of Johannesburg. Seventeen people were killed and 15 were wounded. The same night 10 people were killed at a meat restaurant in Lwandle, near Cape Town. Days earlier 11 people had been shot at a house party near Durban. In the Wedela attack police are investigating the possibility of a score-settling over control of illegal mining sites. Illegal miners known as «zama zama» live in the area and powerful gangs run the illicit gold trade. The government submitted to parliament a bill that provides for up to 30 years in prison and a fine of 100 million rand for illegal mining offences (see the MINING section).

On the xenophobia front, the tension tracked since July turned into a concrete step. The Nigerian Consulate General announced that three of its citizens were killed between 18 and 21 September. The «March and March» movement had declared 30 September as the deadline for undocumented migrants to leave the country. On that day demonstrations were held in several provinces, Durban foremost among them. Nigeria evacuated another 105 citizens, and Ghana continued its own evacuation flights despite criticism. The reaction has gone beyond the level of diplomatic protest and evolved into a de facto withdrawal.

# MOZAMBIQUE

In Cabo Delgado, Islamic State activity moved closer to the coastal strip again. The group announced on 28 September that it had captured and killed two civilians in the village of Maputo, 25 kilometres north of the town of Mocímboa da Praia. Local sources confirmed that people were abducted from the village. In the village of Nangunde in Muidumbe, the Local Force, made up of former independence fighters, killed two suspects in an ambush. This activity coincides with the days when TotalEnergies employs 10,000 people on the construction at Afungi and is discussing accelerating the second phase (see the ENERGY section).



**DIPLOMACY**

# ETHIOPIA, ERITREA AND EGYPT

The war in the north brought Addis Ababa's relations with three of its neighbours to breaking point within the same week. With Eritrea came the embassy closure and the severing of relations. With Cairo, mutual expulsions of diplomats were also carried out with a 48-hour deadline. Egyptian President Sisi reiterated that he prioritises diplomacy on the dam issue but that water security is not up for negotiation. Ethiopia responded by opening a new file. The Minister of Water and Energy announced that a national committee has been set up to calculate the economic loss caused by water projects allegedly blocked by Egypt. The minister said 22 projects, including the Grand Renaissance Dam, have been identified and the legal basis for a compensation claim has been prepared. After the Nile Basin Framework Agreement entered into force without Egypt's signature, Addis Ababa is moving from a defensive position to one of making demands. The accusation that Cairo supports the Tigray alliance provides political ground for this legal move.

The African Union Commission called on the three countries to exercise maximum restraint and asked them to avoid statements that would raise tension. The UN and the African Union asked Olusegun Obasanjo, the architect of the 2022 Pretoria

Agreement, to step in again. Abiy, meanwhile, is trying to narrow the front at home. The prime minister gathered pro-government and opposition Oromo politicians at the same table and sought a common Oromo position against the Oromo Liberation Army, which has joined the alliance. The place of the Ogaden National Liberation Front in the alliance was the most sensitive topic at the meeting. The search for legitimacy also continues on the external front. In the middle of the war, Abiy attended the groundbreaking ceremony of the Lamu refinery in Kenya on 30 September. During his visit to Djibouti he also announced the 660 million dollar fuel pipeline (see the ENERGY section). In the days when the Tigray alliance is targeting the Djibouti road, these projects are part of Addis Ababa's effort to diversify its supply security.

Somali President Hassan Sheikh Mohamud toured regional capitals in exactly these days. He met Abiy in Addis Ababa on 29 September and Ismail Omar Guelleh in Djibouti on 30 September. He is then expected to travel on to El Alamein in Egypt. He is visiting two capitals hostile to each other one after the other. The reason is that Mogadishu owes the military balance in South West State to Ethiopia and its weight in AUSSOM to Egypt. If Ethiopia's troop withdrawal plan materialises, Mogadishu cannot sustain this dual balance and will have to lean more on Cairo.



# SUDAN

Washington turned the visa into an open instrument of pressure this week. The US did not grant Burhan a visa for the UN General Assembly. Massad Boulos, the President's adviser on Arab and African affairs, said this was a deliberate signal of displeasure with the army's stance on ending the war. Boulos's proposal envisages a 90-day ceasefire, followed by negotiations to end the war and a return to civilian rule. The adviser also stated openly that neither the army nor the RSF represents a legitimate and constitutional government. He said the arms embargo should be widened and gold revenues should be targeted. Port Sudan's response was harsh. Burhan's adviser Amjad Farid said the condition that the RSF withdraw from cities under international supervision was being ignored. He said the plan in its current form would push the country towards a Libya-style de facto partition. Burhan declared that he will not bow to pressure and that he is not asking anyone for a visa. Foreign Minister Mohieddin Salem called at the General Assembly for the implementation of the 1947 Headquarters Agreement.

Two parallel processes are at work on the multilateral track. On 30 September ministers met in New York at the call of the African Union, the EU, France, Germany, the United Kingdom and the US. They outlined a two-step path. The first step is negotiation of a lasting ceasefire between the army and the RSF. The second is a civilian dialogue that will determine the future of governance. The communiqué noted that 33 million people

need assistance and about 20 million face acute food insecurity. Pekka Haavisto, the UN Secretary-General's special representative, said both sides have set up a mechanism to discuss confidence-building measures such as prisoner exchanges and the release of civilian detainees. He added, however, that both are seeking gains on the ground before sitting at the table. The army's advance in North Kordofan confirms this assessment.

The Security Council will vote on the sanctions regime on Thursday 8 October. The one-month technical extension made on 11 September by resolution 2828 expires on 9 October. The US wants the embargo to cover all of Sudan as well as drones and dual-use technology. The Council's three African members, the DRC, Liberia and Somalia, together with China, Pakistan and Russia, favour a straight one-year extension limited to Darfur. In the General Assembly hall the Sudanese representative accused the UAE of supporting the RSF and objected to the UAE's use of the phrase «Port Sudan authority». There was also a verbal duel with the Chadian delegation. Saudi Crown Prince Mohammed bin Salman called Burhan and reiterated his support for the country's unity. Egypt agreed to raise the electricity it supplies to Sudan by 25 megawatts to 100 megawatts. It also brought the settlement of 140 million dollars in accumulated receivables into the talks. Ousted leader Omar al-Bashir was transferred to a military hospital in Khartoum, and his lawyer said preliminary approval had been obtained for treatment abroad. This prompted a warning from the prosecution of an «attempt to smuggle him out».



# SOUTH SUDAN

On 22 September Salva Kiir dissolved the Revitalised Transitional Government of National Unity and placed the country under a caretaker administration. The decision came immediately after the conditions tying elections to the completion of the permanent constitution and the census were removed from the electoral law. The question that arose last week with the dismissal of the chair of the electoral commission was thus answered. Kiir did not postpone the 22 December timetable. He chose to preserve it by dismantling the power-sharing architecture of the 2018 peace agreement. The opposition alliance SSOMA, led by Thomas Cirillo, called the step a coup against the constitutional order and demanded a new peace process. The summit of the African Union Committee of Five, chaired by Ramaphosa, stressed on 29 September that the 2018 agreement is the only valid framework and that an election alone will not secure democracy. At the UN rostrum the Juba delegation reiterated its commitment to the timetable, saying «the ballot box must replace the bullet».

# MALI, BURKINA FASO AND NIGER

The AES capitals turned the UN General Assembly into a joint front of accusation. Malian Foreign Minister Abdoulaye Diop said Ukraine is continuing the support it claimed in 2024 and is providing funds, equipment and drones to armed groups in the Sahel. He described Kyiv as «the tip of the iceberg». Niger's Prime Minister Ali Mahamane Lamine Zeine directed the accusation at France. Zeine claimed that the attempt to destabilise the Central Sahel is directed by Paris and carried out with Ukraine's active complicity. He claimed that the aim is to open a new front from the northeast of the country. He also pointed to two neighbouring countries without naming them. Burkina Faso's foreign minister said «we do not ask anyone for a certificate of sovereignty». The concrete basis of the accusation is the press reports this month that about fifteen Ukrainian drone specialists are working with the Azawad Liberation Front. It is Washington that mainly bears the cost of this relationship. The US is trying to rebuild relations with Bamako, and the appearance of its ally on the same field as the junta's enemies makes this opening harder.

While the rhetoric hardens, the network of relations is diversifying. In his speech Zeine referred to Algeria as a brotherly country that invests in the country's natural resources and supports its defence system. He cited the trilateral gas pipeline and the Trans-Saharan highway. He named Togo, Türkiye, Morocco, Russia and China as «true friends». In New York Diop signed a memorandum on political consultations with Azerbaijan and, together with Morocco, the African convention on child soldiers. He met the foreign ministers of Qatar and Congo, the United Kingdom's minister of state for Africa, his Iranian counterpart Abbas Araghchi and Guterres. Ouagadougou decided to consolidate its relationship with Tehran and revive the one with Algeria. It also agreed with North Korea's deputy foreign minister to speed up exchanges of delegations. Niger established diplomatic relations with Kyrgyzstan. Russia held a separate consultation meeting with the three countries on 24 September. According to the minutes of the meeting held with Germany, Italy and Switzerland on 22 September, commercial and industrial relations were discussed. There is, however, no signed agreement and no announced financing. The channel opening to the West remains at the level of intent for now.

The real movement is at the regional level. Malian Prime Minister Abdoulaye Maïga announced in Bamako on 28 September that talks had begun to

define a new framework for relations between the AES and ECOWAS. The file, pending since June, was called a formal negotiation for the first time. The fifth meeting of AES trade and industry ministers ended the same day. It agreed the foundations of a confederal single market and the basis for the bargaining with ECOWAS. The figure Maïga gave shows the starting point of this goal. Trade among the three countries stands at 351.6 billion CFA francs and makes up only 17 percent of their trade within the West African Economic and Monetary Union. Togolese Foreign Minister Robert Dussey said the AES countries are a «barrier» for the coastal states and should be supported unconditionally. The share of the port of Lomé in Sahel transit trade is the economic counterpart of this stance. On 25 September the telecommunications regulators of the three countries established the Sahel Regulators Council, and the joint broadcaster Tafouk TV went on air.

The juntas' tightening in domestic politics also continued. On 24 September Burkina Faso required civil society organisations to allocate at least 80 percent of their budgets directly to field investment and gave them a two-year compliance period. In Niger, former RFI correspondent Moussa Kaka has been missing since 31 August, and press freedom organisations took the case to the UN Committee on Enforced Disappearances. In Mali the annual update of the voter rolls began on 1 October, but there is no election date. Retired general Yamoussa Camara, permanent secretary of the National Security Council, said «the military method alone is not a lasting solution». This sentence should be noted as a rare admission from within the regime.

An unexpected extension of the Mali crisis emerged in Libya. A senior delegation from the Azawad Liberation Front met Saddam Haftar in eastern Libya. The contact goes back to the release, through Saddam Haftar's mediation, of Russian fighters captured at Tinzaouaten in 2024. It had continued with a secret visit to Ubari and Benghazi in August. Moscow's main partner in Libya is keeping a channel open with the movement that hits Moscow's soldiers in Mali. This reveals that this line running through Fezzan is driven by calculations of hostages, transit and trade more than by ideology.

## DRC / RWANDA

The Security Council's quarterly session on 29 September turned into a hearing in which the two capitals accused each other. DRC representative Zénon Mukongo claimed that the Rwandan army and the AFC/M23 govern the occupied areas in a way that is «criminal in administrative, territorial

and demographic terms». He claimed that Rwandan populations are being settled in localities emptied by massacres, and he recalled that resolution 2773 prohibits parallel administration. Kinshasa also asked that the participation of Rwandan peacekeepers in new UN operations be suspended until the withdrawal of Rwandan forces from its territory is verified. It further asked that the drone attack in Pinga be examined by the verification mechanism. Rwandan representative Martin Ngoga raised the reinstatement as army spokesman of Major General Sylvain Ekenge, who had been suspended over remarks about Kinyarwanda-speaking communities. Mukongo replied «Rwanda cannot tell us which officer to appoint». The UN recorded that the Washington and Doha processes have slowed because of weak implementation.

The card in Kinshasa's hand is the FDLR file. On 30 May the government signed a protocol on the group's disarmament, demobilisation and cantonment. The President's special representative Floribert Anzuluni presented this process to African Union mediator Faure Gnassingbé in Lomé on 29 September. On 30 September he presented it to João Lourenço in Luanda and to Denis Sassou Nguesso in Brazzaville. The aim is to take off the table the threat that Rwanda uses to justify its military presence. Kigali described the protocol as «not even an event» and found it inconsistent with the Washington Agreement. Prime Minister Justin Nsengiyumva said at the General Assembly that the roots of the conflict are political and that the solution must also be political. He thanked Trump, the Emir of Qatar and Gnassingbé. Corneille Nangaa, the political coordinator of the AFC/M23, spoke at a ceremony in Rutshuru where more than 500 cadres completed their ideological training. He rejected Kinshasa's national dialogue initiative and declared that he accepts only Doha as the interlocutor. The African Union's mediation group of five former heads of state will visit Kinshasa, Kigali and Goma by mid-October.

Three developments stood out on the external actors' front. French Foreign Minister Jean-Noël Barrot travelled to the DRC on 2-3 October and included Bunia, the centre of Ebola, in his programme. Paris wants to be visible on the file again as it holds the Security Council presidency in September. Bank of Kigali became the first East and Central African bank to join CIPS, China's yuan-based cross-border payment system, as a direct participant. It did so under an agreement signed in Xiamen on 8 September. A Congolese civil society platform applied to the US Treasury with a warning that US sanctions on the Rwandan army and on the illegal trade in Congolese minerals could be circumvented through this channel. On the Washington front the relationship is expanding through migration. Burundi announced that it will accept third-country nationals deported by the US. Rwanda also told European parliamentarians that it is open to hosting migrants transferred from European countries.

# SOMALIA

In his General Assembly speech Hassan Sheikh Mohamud said his country does not want the UN to leave. He demanded, however, that aid be delivered through Somali institutions and not through parallel structures. He argued that more than thirty years of UN engagement has made lasting institution-building harder through projects outside the national budget. He asked for predictable financing for the security transition, adequate resources for the African Union mission and a permanent seat for Africa on the Security Council. The emphasis on sovereignty was aimed at the Somaliland file. Mohamud said he rejects unilateral steps that undermine the country's internationally recognised borders, but he named no state. At the same rostrum Algerian Foreign Minister Ahmed Attaf openly accused Israel of trying to divide Somalia. A report by a Europe-based think tank conveyed what Saudi officials believe. They believe that the UAE played a facilitating role in Israel's recognition of Somaliland on 26 December 2025 and that Berbera is linked to Israel's security interests. The rivalry between Riyadh and Abu Dhabi is reflected on the opposite shore of the Gulf of Aden through this file.

In domestic politics the federal government is advancing the electoral calendar through de facto steps. On 30 September direct votes were cast for local councils and state assemblies in 11 districts of Galmudug and 10 districts of Hirshabelle. Prime Minister Hamza Abdi Barre announced that in Jubaland the election will be held in accessible areas and an alternative procedure will apply elsewhere. The national ID requirement that took effect on 1 October created new friction with Puntland. Passengers without an ID card were not allowed to board flights from Garowe to Mogadishu. Mohamud also said the disruption around the Strait of Hormuz has caused a drop of about 40 percent in customs revenues. For a government that collects most of its revenue from ports, this loss makes security spending more dependent on external financing.

# LIBYA

The path to elections opened on paper, while the rift between institutions deepened. The House of Representatives had unanimously approved the final agreement of the 4+4 committee on 14 September. On 28 September it passed Law No. 4 of 2026, which amends the law on the election of the head of state. The text provides for presidential and parliamentary elections to be held simultaneously within 24 months at the latest from the establishment of a single executive authority. It allows dual nationals and military personnel to run under certain conditions. These two provisions directly clear the way for the candidacy of the Haftar family. The High Council of State declared the law unconstitutional. It argued that substantive changes to electoral rules must pass through the joint mechanism of the two chambers. The 4+4 committee will hold its tenth meeting in Tunis on 4 October with sovereign positions on the agenda, and the outcomes will be presented to the Security Council in mid-October. The process seen in Ankara last month has thus moved to Tunis under the UN umbrella.

Washington's parallel initiative is the main factor shaping the picture. Boulos said notable progress had been made between east and west on a unified budget and on economic and security coordination, and that results could be seen soon. According to the draft reported in the press, Abdul Hamid Dbeibah will remain prime minister and Saddam Haftar will head the Presidential Council. Boulos argued that the plan is «not about families» and that it complements the UN process. After his meeting with Hakan Fidan he referred to Türkiye as an important partner. He also said the initiative will be carried out together with Türkiye and Egypt over the next two years. On 1 October Khalifa Haftar received in Benghazi more than 70 members of parliament, bringing together supporters and opponents of Aguila Saleh. According to information leaked about the meeting, he asked for the unification of the executive and for Saddam to chair the Presidential Council. Last week's attempt by 86 members of parliament to remove Saleh was thus placed under Rajma's arbitration. Saddam Haftar's plane landed in Abu Dhabi on 28 September, twenty minutes after Netanyahu's landing. The Italian press interpreted this simultaneity as a search for political support from Israel. During the same visit Saddam met the UAE's Vice President and the minister of state for defence affairs.

The maritime jurisdiction file heated up again. On 24 September Italy submitted its updated maritime baselines to the UN. Tunisia had formally objected in April to the continental shelf limits that Libya notified on 27 May 2025. Together with Greece's

objection, three capitals converged on the same point against Tripoli's map. It was also reported in the press that Israeli security institutions are closely monitoring the 2019 Türkiye-Libya memorandum of understanding and Türkiye's military presence in Libya in terms of freedom of navigation in the Eastern Mediterranean. Algeria is approaching from a different path. Air Algérie will resume Algiers-Tripoli flights on 28 October after a ten-year break.

There are two developments under the accountability heading. The EU called for an immediate halt to executions in Benghazi and Derna. On 23 August the Haftar administration had ended the moratorium that had been in effect de facto since 2010. Amnesty International documented at least 30 executions up to 9 September. The Office of the Prosecutor of the International Criminal Court confirmed that it received a request for assistance in the investigation of a «sabotage cell» linked to the drone attacks in Tripoli and Zawiya. The request was transmitted with the approval of Menfi and Dbeibah. Schools could not open across the country because of a teachers' strike, and more than 1.6 million students are deprived of education. This strike unites east and west in the same demand. It is a rare sign that the social resonance of the political division is weakening.

## SOUTH AFRICA

Pretoria summoned US Ambassador Leo Brent Bozell to the foreign ministry for the third time in nine months and handed him a note of protest. In the past two weeks the ambassador had openly criticised the government on land reform, race-based equity policies and farm murders. The US State Department spokesperson responded «we are not interested in diplomatic manoeuvres and in dialogue for the sake of dialogue». Secretary of State Rubio's announcement of visa restrictions on South Africans came at a moment when talks on mining investment were advancing. Foreign Minister Ronald Lamola said they will not retaliate but that nothing can be certain with the current administration. Trade Minister Parks Tau, meanwhile, called on US companies in New York on 24 September to invest in processing and manufacturing in platinum group metals, manganese, chrome and vanadium. He proposed a joint critical minerals working group. Pretoria is trying to separate political punishment from the minerals bargain. Washington keeps the two on the same table.

# MOROCCO, ALGERIA AND TUNISIA

In Morocco, King Mohammed VI tasked PAM leader Fatima Ezzahra El Mansouri with forming the government on 29 September. The 50-year-old lawyer became the first female prime minister in the country's history. Her party had won 97 of 395 seats in the 23 September elections. During the campaign El Mansouri had criticised conflicts of interest in fuel, desalination and public procurement. Yet she served as a minister in the same government for five years, and her predecessor Aziz Akhannouch is one of the country's richest businesspeople. Fuel prices rose again the day after she took office. Mounir Limouri, mayor of Tangier and one of the party's leading figures, was detained at the airport on 28 September on his return from Spain as part of an electoral irregularities investigation. Amnesty International documented a surveillance system that targets journalists and rights defenders and relies on spyware and on recording devices placed in homes and vehicles. Rabat devoted the New York week to the Western Sahara file. Foreign Minister Bourita reiterated that there is no solution other than autonomy. The target is the Security Council vote on 31 October. King Felipe VI of Spain is to go to Ceuta on 13 October for the first time since his accession to the throne, and this creates a new point of friction.

In Algeria, the National People's Assembly amended the penal code on 1 October. It extended the death penalty to cover those who deliberately start forest fires and those who kidnap children. The country has applied a moratorium on executions since 1993. The amendment was prepared on Tebboune's instruction after the summer fires, in which 12 people died according to the official figure. It became the legal counterpart of a discourse that attributes the fires to malicious hands rather than to the state's lack of preparedness. In New York Foreign Minister Attaf reopened the file of an «article by article» review of the association agreement with the EU. He said Algeria is ready to accompany Sahel countries in security and development and called for an end to foreign interference in Libya. The political consultation meeting with Madrid confirmed that relations have normalised. In Tunisia, Kais Saied converted the five-year prison sentence for the «fake news» offence in Decree 54, which rights groups have criticised for years, into a fine. At the same cabinet meeting he said the people are waging «a war of liberation on all fronts». Nine organisations, including the UGTT and the journalists' union, called for a march in the capital on 17 October.



# NIGERIA/GHANA

The new health agreements that Washington is offering Africa turned into political debate in three capitals this week. Ghanaian President John Mahama announced on 25 September that his country rejected the health agreement proposed to replace USAID funds. The text asked Ghana to hand over its pathogen profile and health records to the US, to make a specific co-financing commitment and to change the powers of its drug regulatory agency. Mahama found the offer «humiliating». In Nigeria, opposition candidate Atiku Abubakar then demanded publication of the full text of the five-year health memorandum that Abuja signed on 19 December 2025. In Zimbabwe, the US formally ended decades of health assistance after talks on a 367 million dollar agreement collapsed in February. Harare had not accepted the condition of access to sensitive medical and biological data. In Zambia, meanwhile, Washington removed the mineral and data clauses from the 1.5 billion dollar health pact. More than thirty countries have signed this framework. Capitals with bargaining power can change the terms, and those without it lose the aid.

# GUINEA-BISSAU /UGANDA

Ousted President Umaro Sissoco Embaló announced on 28 September that he will return from exile and run in the 6 December presidential election. Embaló has lived in Morocco since the army seized power on 26 November 2025, one day before the election results were to be announced. On 1 October the military administration headed by General Horta N'Tam refused to allow the return on grounds of national security and public order. It also announced that the ban on political demonstrations remains in place. Unrest within the presidential guard was reported the same week. The transitional administration presents the election as a return to civilian rule. By keeping the strongest candidate out of the country, however, it is drawing the limits of the race in advance.

The Ugandan army suspended military cooperation with Türkiye because opposition blogger Fred Lumbuye was not extradited. Chief of General Staff Muhoozi Kainerugaba openly voiced his displeasure with Ankara. Lumbuye has lived in Türkiye since 2013. In 2021 Ugandan prosecutors brought charges of incitement to violence and harmful propaganda

against him, and the deportation procedure was never concluded. The permanent secretary of the foreign ministry said relations are «good» and that problems will be resolved through diplomatic channels. The army is acting independently of the foreign ministry, and this is a new example of Kainerugaba's personal weight in foreign policy. In the same days the Ethiopian ambassador briefed the general in Entebbe on the war in the north.

**ENERGY**

# KENYA, NIGERIA / EAST AFRICA

Aliko Dangote and Kenyan President William Ruto broke ground in Lamu on 30 September for a 16 billion dollar refinery and petrochemical complex with a capacity of 700,000 barrels per day. Dangote pledged that the facility will come on stream within 40 months, that is in early 2030, and offered East African governments a combined 30 percent stake. The ceremony was attended by Ugandan President Museveni, Ethiopian Prime Minister Abiy Ahmed, Beninese President Romuald Wadagni and former Nigerian President Obasanjo. Honeywell will supply technology, engineering and catalysts under a deal worth about 300 million dollars. The designs developed for the Lagos facility will be reused, which will shorten the schedule by nearly two years. According to the Kenyan government's chief economic adviser, the region's annual product demand is between 20 and 30 million tonnes and almost all of it is met by imports today.

The obstacles facing the project are not of the kind that political will can overcome. On 25 September the Environment and Land Court in Malindi ordered that the status quo on the land be maintained. It did so on an application by 133 people from Chandavai who claim rights over their ancestral land, and the case will be heard on 14 October. Dangote argued that the ruling did not stop the ceremony and claimed that importers and international oil companies are behind the protests. The Ugandan press described the groundbreaking as "political". There is no publicly available feasibility, economic or environmental assessment, and Ruto faces re-election in August 2027. The source of crude oil is also uncertain. Kenya's most advanced project, South Lokichar, will start at about 20,000 barrels. The refinery was initially conceived for Tanzania's port of Tanga, because the pipeline that will carry Ugandan

crude ends there. Museveni said he will discuss Lamu with Tanzanian President Samia Suluhu. This shows that the competition between Tanga, Lamu and Hoima is not yet closed.

On the Ugandan front the timetable slipped once again. The 1,443-kilometre East African Crude Oil Pipeline was expected to open on 1 October, and its commercial production was postponed to June 2027. The Petroleum Authority attributed the delay to the war in the Middle East, which disrupted deliveries of metering, electrical and telecommunications equipment. The central processing facility at Kingfisher, operated by CNOOC, is 99 percent complete, and 22 of the 31 planned wells have been drilled. The first oil target is being postponed for the fifth time since 2018.

Dangote's second move in the region is in logistics. Together with Ethiopian Investment Holdings, a 120-kilometre, 660 million dollar refined products pipeline was announced that will link Djibouti's port of Damerjog to Dewele in eastern Ethiopia. The announcement also covered a total of 1.17 million cubic metres of storage at the two ends. The line is expected to come on stream in 18 months. Rwanda, meanwhile, switched its fuel imports back to Mombasa after routing them through Dar es Salaam for more than a decade. The first cargo of 40,000 tonnes reached the Kipevu terminal on 29 September. In Nigeria, the 2.15 trillion naira public offering of Dangote Refinery will close on 13 October. Regulators in Zimbabwe and Rwanda allowed local investors to take part. NNPC announced a net profit of 7.2 trillion naira for 2025 despite a 24 percent fall in its revenue, and average production of 1.77 million barrels per day. Public sector unions threatened a three-day warning strike from 2 October, demanding that petrol be cut to 500 naira per litre and that the minimum wage be raised. The government reiterated that there will be no return to subsidies.

# ALGERIA, NIGER AND THE TRANS-SAHARAN PIPELINE

Algeria spent the week in a series of contacts that lock Europe's search for gas in its own favour. OPEC Secretary General Haitham Al Ghais met Energy Minister Mohamed Arkab on the tenth anniversary of the Algiers Agreement of 28 September 2016. He described the Trans-Saharan Gas Pipeline as "an excellent project" that will strengthen Europe's energy security. An energy partnership covering both hydrocarbons and the green transition was established with Austria, and 23 companies accompanied the visit of the Austrian Minister of Economy. Trade in crude oil, products and liquefied natural gas was discussed with the Speaker of the Greek Parliament. The new agreements of Germany's VNG with Sonatrach and Italy's placing of Algeria at the centre of its supply strategy point in the same direction.

On 1 October the energy ministers of Algeria, Tunisia, Italy, Germany and Austria signed the Algiers Declaration on the Southern Hydrogen Corridor. The text establishes a technical secretariat supported by the UN Industrial Development Organization. Through the conversion of existing gas pipelines, the corridor will link Algeria and Tunisia to Bavaria over 3,300 kilometres and carry four million tonnes of hydrogen a year. The first results of the feasibility study conducted by Sonatrach and Sonelgaz with their European partners will be announced in 2027. The declaration contains no financing or volume com-

mitment, and it does not specify how much of the value chain will be built in the Maghreb.

The line extending south is advancing more concretely. Following Arkab's visit to Niamey on 21-22 September, Niger's Petroleum Minister Hamadou Tini announced that topographic surveys on the Niger section of the Trans-Saharan line will begin in early October. In Niger, Sonatrach is turning to Bilma after four exploration wells at the Kafra field. At the UN rostrum Zeine referred to Algeria as the country that invests in his country's resources. That is the political endorsement of this partnership. The project's rivals also stirred in the same week. At a gas fair in Bangkok, the oil ministers of Nigeria and Libya discussed preparing a joint technical team and a memorandum text for a line that would carry Nigerian gas to Europe via Libya. Morocco is targeting a final investment decision in the last quarter of 2026 for the 25 billion dollar Atlantic line that will cross 13 countries, and it is seeking support from US Eximbank and the World Bank. Three separate routes for Nigerian gas are on the table at the same time, and the financing of none of them has been closed. In Niamey, meanwhile, the energy crisis shapes daily life. On 29 September the new Energy Minister, Lieutenant Colonel Seyni Alzouma, inspected the construction site of the 30-megawatt Goudel plant. NIGELEC is carrying out the project with China's Jiangsu Jianghao, and it is financed from the state budget. The minister asked about the reasons for the delay and requested a new timetable.

# LIBYA

The crisis on the Sharara-Zawiya line showed that the country's energy infrastructure can be stopped by closing a single valve. Armed groups affiliated with the Western Southern Petroleum Facilities Guard unit and the Western Military Region forcibly closed the line's valve in Zawiya. The National Oil Corporation announced a loss of more than 942,000 barrels of production and about 95 million dollars in revenue in one week. It shut down one unit of the Zawiya refinery, which has a capacity of 120,000 barrels per day. The UN Support Mission recalled that acts targeting oil infrastructure may be grounds for sanctions under Security Council resolutions. The valve was reopened at the end of the week. On 28 September Saddam Haftar appointed Brigadier General Saleh al-Maghrabi to head the Petroleum Facilities Guard unit in the eastern and central region. He replaces Naji al-Maghrabi, who had held the post for nine years. Control over the security of oil fields remains the most valuable card in political bargaining.

In the same week the prosecution arrested the administrative head of the National Oil Corporation's abolished Strategic Programs Office and the director general of information technology. According to the investigation, sensitive data on fields, production levels, reserves and exploration projects ended up in the hands of a foreign company that was contracted in 2023 for a sector development study. The owner of the company turned out to be the spouse of the office's former director, and arrest warrants have been issued for both. The Tripoli government is also examining liquefied natural gas imports for power plants. The Misrata free zone port, the jetty of the Khoms power plant and the port of Tripoli are candidates for the floating storage and regasification unit. A country that exports gas to Europe is debating gas imports for its own power plants. This shows the point reached by the production bottleneck and by the lack of investment in the domestic distribution network. Egypt's Ministry of Electricity signed a memorandum on grid improvement and renewable energy with the Libya Reconstruction and Development Fund. At the Majid field a well that had been closed for nine years was brought back into production at 5,000 barrels per day.

# MOZAMBIQUE

In the Rovuma basin two giant projects are accelerating each other. OneSubsea, the joint venture of SLB, Aker Solutions and Subsea7, won the subsea production systems contract from ExxonMobil for the first phase of Rovuma LNG. It announced that it will set up a base in the country to serve the region. TotalEnergies chief executive Patrick Pouyanné said at the investor presentation on 28 September that the second phase of Mozambique LNG could be brought forward. This calculation rests on two things. The 10,000-strong construction team at Afungi would not be disbanded, and Exxon's neighbouring project gives access to more reserves from the unitised field. Start-up of the first phase is expected in 2029. The closure of the Strait of Hormuz increased the appeal of supply from outside the Middle East, but the same disruption also affected the project's equipment flow. The environmental organisation Justiça Ambiental and 25 organisations sent a letter to three Japanese shipping companies asking them not to finalise the project's order for 17 LNG tankers. The letter expects a reply by 6 October.

The distance between the horizon of gas revenue and the state's current fiscal position is widening. On 25 September S&P lowered the country's foreign currency rating to CCC and kept the outlook negative. The agency said the likelihood has increased that the sole Eurobond, maturing in 2031, will be restructured before principal payments start in March 2028. It said the fiscal impact of the gas project will not be felt before 2030. Concession revenues fell 62.6 percent in the first half of the year. On the fuel side the government attributed the queues in the capital to the logistical disruption of the long weekend. Vitor Timóteo was appointed head of ENAPP, the state company with sole authority over the country's purchases of petroleum products. For at least four years he ran the investment arm of Frelimo, which holds stakes in the fuel storage terminals at Matola and Beira. Petrobras signed a two-year cooperation memorandum with the state company ENH.

# ANGOLA AND NAMIBIA

On the offshore exploration front, capital commitments spread to new blocks. The National Oil, Gas and Biofuels Agency signed risk service contracts with Shell, Equinor and Sonangol for deepwater blocks 19, 34 and 35 in the Kwanza basin. The contracts grant up to five years of exploration and a 30-year production period for each commercial discovery, and they require at least one exploration well. A heads of terms document was signed with Shell, QatarEnergy and Sonangol for blocks 8 and 22, and a contract was signed with Chevron, Shell and Sonangol for block 33/24 in the Congo basin. Separate agreements were concluded for four blocks operated by TotalEnergies. The investment wave that peaked on the production side last week thus found its counterpart on the exploration side. The Gulf's entry extends to the services chain. Omani oilfield services company DSOG signed a memorandum with Sonangol. Oman's national company OQ had signed

a separate memorandum the same month covering exploration, LNG, fertiliser and petrochemicals. The US Trade and Development Agency will finance the study of hydropower and distribution investments along the Lobito Corridor. These investments will supply electricity to mines in the DRC and Zambia and to more than three million people.

In Namibia, TotalEnergies announced that the final investment decision for the Venus field is "a matter of weeks". The company foresees about 17 billion dollars for the development of the field it discovered in 2022 and expects production of 160,000 barrels per day at full capacity. The decision was initially expected at the end of July, and talks with the government on terms have been going on for months. Pouyanné said the project delivers good returns at high prices but needs to be protected against low prices. This sentence indicates that the bargaining is knotted on the fiscal regime.

# SENEGAL

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**MINING**

# BURKINA FASO AND MALI

On 28 September Ibrahim Traoré inaugurated Raffinor-BF, the country's first gold refinery, in Ouagadougou. He said "gold will no longer only be mined in Burkina Faso, it will be processed, controlled and certified here". Two days before the fourth anniversary of his rule, the facility was presented as the new symbol of sovereignty politics. Annual capacity was announced as 150 tonnes, while the presidency gave a figure of 164 tonnes. The refinery was launched in 2023 jointly with Mali's Marena Gold. Today it is wholly owned by the state company SONASP and cost about seven billion CFA francs excluding the land. The real problem is feedstock. The country produced 94 tonnes of gold in 2025. For the facility to run near capacity, industrial mines, small-scale production and probably imported ore must be directed into the same channel. Part of the informal production is under the control of armed groups, and Ghana, Guinea, Mali and Côte d'Ivoire are building their own refining capacity at the same time.

In Mali, Barrick signed a new collective agreement with the unions at the Loulo-Gounkoto complex, and the strike announced for the end of September was called off. The unions had submitted 15 demands covering overtime pay, payment of mission expenses and implementation of labour agreements. The company had returned to the country after resolving last November the two-year dispute over profit sharing and control. Production at the country's largest gold asset was thus protected once again. Washington is also turning to the sector. On 24 September the US Embassy held a closed panel in Bamako with about twenty guests made up of mining and security experts. The purpose of the meeting was to discuss how a long-term commercial presence of American companies in Mali's gold and lithium resources could be established. Russia's military presence has become a regular target in this period. This step tests whether the junta is open to separating its security partner from its economic partner. The government allocated 18.4 billion CFA francs from the mining fund to the Sikasso and Ségou regions.

## NIGER

The strategy of returning to uranium by enlarging the state's share is taking shape. Under the settlement reached in August, the state took a 40 percent stake in the Madaouela project and Australia's Atomic Eagle holds 60 percent. On 30 September the company announced that it is reassessing the project in order to develop it on a larger scale. The 2022 feasibility study had selected ore on the basis of a price of 55 dollars per pound. At the end of August the contract price indicator reached 96.5 dol-

lars. A larger plant, the combined operation of open-pit and underground deposits, and the inclusion of ore left out of the old plan are being examined. The goal is to be construction-ready within two years. The country's uranium production fell from 4,116 tonnes in 2015 to 962 tonnes in 2024. At the UN Zeine said "our uranium lit up Europe, Niger remained in the dark". Small Australian and Canadian companies are filling the gap left after Orano's withdrawal with US public financing. In return the state is raising its ownership share.

# NIGERIA

Minister of Solid Minerals Dele Alake and US Deputy Secretary of State Christopher Landau signed a critical minerals framework agreement in New York on 23 September. The text covers geological data and exploration, mineral development and processing, infrastructure and technical capacity. Alake valued the country's mineral resources at about 700 billion dollars and said Nigeria cannot remain a source of raw materials. The African organisation of the International Trade Union Confederation recalled that no details have been disclosed on projects, financing commitments, volumes, pricing or offtake provisions. It warned that dependence on crude oil must not be replaced by dependence on exports of unprocessed lithium and rare earths. The federal investigative panel on the 37 miners who died in the custody of the civil defence corps in Niger State began work in closed sessions in Minna on 29 September. Families say no one from the state government has called them.

ments. The enforcement that began with Glencore last week is thus turning into a regime that extends across the whole sector. Chinese Ambassador Zhao Bin announced that bilateral trade exceeded 19.2 billion dollars in the first seven months of the year and that the DRC ran a surplus of 10.6 billion dollars. He said the country is the number one destination for Chinese investment in Africa.

Washington is intervening in the same supply chain with a different tool. On 18 September the Ways and Means Committee of the US House of Representatives approved with bipartisan support a bill targeting forced labour and child labour in DRC cobalt mines owned by Chinese entities. The bill provides for an investigation of cobalt supply chains and a review of the indirect entry of related products into the US market. Chinese companies hold stakes in 15 of the country's 19 cobalt mines. The floor vote was left until after the midterm elections in November. Rwanda, meanwhile, reiterated its target of raising mineral export revenue from 1.75 billion dollars in 2024 to 2.17 billion dollars in 2029. Production rose 26 percent year on year in the second quarter. Separating these figures from ore of Congolese origin is the core of Kinshasa's sanctions request at the Security Council.

# DRC/RWANDA

Kinshasa is turning its regulatory power into a permanent instrument of oversight over mining companies. The director general of the subcontracting regulator ARSP announced that from 2027 large mining companies will be audited every year on their subcontracting practices and local content obligations. The new local content law takes effect on 1 January 2027, and sector-specific rules will include sanctions and mandatory three-year compliance plans. This month the agency instructed Glencore, Ivanhoe's Kipushi zinc mine and Chinese-controlled Sicomin to end non-compliant subcontracting arrange-

# SUDAN

The Central Bank's loosening of gold purchase and export rules exposed the balance of power in the war economy. Twenty-three mining companies had threatened to halt production from 1 October. The new circular gave companies the freedom to sell all of their output to the bank, to authorised buyers or to exporters, and the right to hold foreign currency earnings for 21 working days. The head of the Gold Exporters Division said the country produces more than 70 tonnes of gold a year, worth about eight billion dollars, but only two billion dollars of this reaches the treasury. He accused influential actors of taking gold outside official channels. The state mining company launched the first official shipment in Kassala that carries production directly to the state refinery. The refinery infrastructure in Khartoum was destroyed in the war, so the chain of control is being dispersed to the states. The foreign currency that was expected to stop the collapse of the pound continues to remain largely off the books.

# SOUTH AFRICA

Gold Fields made a cash and share offer worth 38.7 billion Australian dollars, about 27 billion US dollars, for Northern Star, Australia's largest gold producer. The Northern Star board unanimously rejected the offer. Gold Fields did not back down and announced its intention to go directly to shareholders. If it succeeds, the world's second largest gold producer after Newmont will emerge. The reason given for the rejection is notable. The Northern Star chair said nearly three quarters of the offer is paid in Gold Fields shares and that these shares carry a markedly higher country risk. South African capital is expanding abroad while the security and logistics picture at home drags its valuation down.

Both ends of this picture became visible in the same week. The Mining Laws Amendment Bill submitted to parliament introduces up to 30 years in prison and a fine of 100 million rand for offences linked to illegal mining. The Minister of Justice said illegal mining networks are intertwined with kidnapping, human trafficking, forced labour and murder. The Wedela massacre is the most recent example of this finding (see the CONFLICT AND WAR section). On the logistics side, manganese producers are turning to Namibia's port of Lüderitz because of the rail bottleneck. Jupiter Mines shipped 828,000 of the 3.5 million tonnes it sold in the last financial year through this port. Transnet is seeking a private partner for a 25-year project that requires investment of up to 44 billion rand for a new manganese export terminal and rail corridor at Ngqura. State defence company Denel announced that it sold Mokopa missiles for naval helicopters and Umkhonto missiles for frigates to an unnamed North African country.



# MOZAMBIQUE

Gemfields booked an impairment of 125.2 million dollars for the Montepuez ruby mine and expects a loss of 73.5 million dollars in the first half of the year. Recovery of high-quality rubies fell short of expectations. The mine is currently unable to pay management and auction fees to the group, and the company is discussing refinancing with banks. The mine had generated 1.1 billion euros in revenue since 2014. Britain's NeoTerra, meanwhile, requested a five million dollar grant from the US government for a study to expand its fluorspar project at Monte Muambe. The company had previously received 1.875 million dollars from the US Trade and Development Agency for a rare earths study at the same site. After graphite and rare earths, fluor-spar is a candidate to be the third critical mineral that Washington supports in the country. The US is entirely dependent on imports for fluorspar.



# ZAMBIA/ ZIMBABWE

Zambia's state mining company ZCCM-IH accused Abu Dhabi-based International Resources Holding of "widespread and continuous" breaches of the agreements on the transfer of the Mopani copper complex. According to a letter dated 18 September, Delta Mining, the IRH unit that holds a 51 percent stake, had spent only 62.3 million dollars of the 308.1 million dollar development budget by the end of March. It did not put in the planned capital and created high-cost debt without approval. Last year's cathode output fell short of the business plan by more than half. ZCCM-IH said it may seek compensation and go to arbitration.

President Hakainde Hichilema met IRH's chief executive in Abu Dhabi the same week, and the two countries signed memoranda covering an investment intention of 2.14 billion dollars. After the informal gold flows, Lusaka is now settling scores with UAE capital in copper as well, yet it continues to obtain new commitments from the same partner. Hichilema asked Mopani to comply with the local content law and to contribute to the national copper target of three million tonnes. According to the government this target requires 8,000 megawatts of electricity. Zimbabwe announced a ban on the export of all raw minerals and lithium concentrate. The lithium restriction expected for January 2027 thus became part of a broader ban.

# GHANA AND COTE D'IVOIRE

Ghana's draft new mining law grants the state a free "special share" in companies. This share gives a veto right over transactions such as the transfer of mining licences, voluntary liquidation and the disposal of overseas assets linked to Ghanaian operations. The draft reduces the licence term from 30 years to 15 years or to the projected life of the mine. It gives the government the power to impose local processing requirements and to restrict exports of unprocessed concentrate. The existing 10 percent free stake is retained. In the same days the Environmental Protection Agency issued a pre-closure notice to Chinese-owned Cardinal Namdini over an unreported accident. It is also reviewing the audit findings at Gold Fields' Tarkwa operation. In Côte d'Ivoire, Canada's Montage Gold carried out the first gold pour at its 712 million dollar Koné mine on 26 September. The mine targets production above 300,000 ounces a year in its first eight years. Abidjan aims to reach 100 tonnes a year within a decade and to become the continent's top gold producer in 2035.

# NAMIBIA AND BOTSWANA

China secured a long-term offtake right in Namibian uranium in exchange for capital. The overseas arm of state company China National Nuclear Corporation provided a 320.4 million dollar package to the Etango project of Australia's Bannerman Energy. In return it obtained 42.75 percent of the project's economic return and the right to purchase 60 percent of production over the life of the mine. Bannerman thereby completed its financing without resorting to bank debt. Windhoek is seeking a balance between China and the US in critical minerals, but the actual financing of projects comes from Beijing.

In Botswana the diamond crisis is squeezing the state's biggest strategic decision. On 25 September Moody's lowered the country's rating from Baa1 to Baa2. This is the second downgrade in less than a year. The agency warned that a significant increase in the government's stake in De Beers through borrowing could lead to a new downgrade. The review of the sale of Anglo American's 85 percent stake was due to be completed at the end of September. Finance Minister Ndaba Gaolathe said the stake "will be more than 15 percent". President Duma Boko said other countries and institutional investors would also take part, and he mentioned Angola. Angola is known to be targeting a 20-30 percent stake through its state diamond companies. Last December the IMF had advised the government not to increase its stake. This file, tracked since June, has reached the decision stage, but the fiscal cost of the decision is now being priced by the rating agencies.

# KENYA AND EGYPT

Kenya's Mining Minister Hassan Ali Joho said talks with the US on developing a critical minerals processing industry are at a "very advanced" stage. The US departments of commerce, defense and state are taking part in the talks, and offtake agreements are being discussed. Joho said a special economic zone, port access and tax incentives will be part of the package. The talks are intertwined with the tender process for the Mrima Hill deposit on the coast, which is estimated to contain tens of billions of dollars of rare earths. In Egypt, the World Bank announced at the mining forum that opened on 28 September that it is interested in providing seed financing to the sector. Cairo is targeting new mining investment, above all in gold.

## CONCLUSION

The continent's three major wars were defined in the same week by official accusations directed at neighbouring capitals. Addis Ababa saw Asmara, Cairo and Port Sudan behind the Tigray alliance and effectively broke off relations with two of them. At the UN rostrum Port Sudan pointed to Abu Dhabi and N'Djamena, and Chad threatened to respond for the bombs falling on its own territory. Kinshasa accused Kigali of settling populations. Bamako and Niamey targeted Kyiv and Paris. Laftagareen targeted Ankara. Behind each of these accusations lies a common technical reality. Cheap drones have closed the distance between front line and capital, between army and militia, and between state and proxy. The general staff building in Addis Ababa, a student dormitory in El Obeid, the airfield in Pinga, a barracks in Goundam, a Russian convoy in Niono and the city centre in Baidoa were all hit with this tool in the same week. As the range and cost of the weapon fall, the claim of external support becomes more credible while proving it becomes harder. This leaves the diplomatic resolution of the wars hostage to score-settling between neighbours.

Within this picture Washington is acting more like a bargainer than a mediator, and it is linking the tools in its hand to one another. The denial of a visa to Burhan was tied to acceptance of the ceasefire plan. The visa restriction on South Africa was tied to a change in its domestic policy. Health aid was written into the same text as access to data and minerals. Ghana rejected this, Zimbabwe lost the aid, Zambia had the clauses removed, and in Nigeria publication of the text is being demanded. In the same days a critical minerals framework was signed with Nigeria and processing industry talks advanced with Kenya. A closed panel on gold and lithium convened

in Bamako, a grant request for fluorspar came to the table in Mozambique, and Burundi accepted deportees. In Libya and Sudan the same adviser is running two separate power-sharing drafts, and the criticism is the same in both. An arrangement that institutionalises the armed forces on the ground may make division permanent under the name of unification. China took quieter but more binding steps. The offtake right for 60 percent of Namibian uranium, Kigali's entry into the yuan payment system and seven-month trade with Kinshasa exceeding 19 billion dollars were all recorded this week. Gulf capital signed new memoranda worth two billion dollars in the same week that it faced an arbitration threat in Zambia. The gap between commitment and implementation is now a complaint that host states voice as well.

Resource nationalism has moved from the ownership debate to the stage of processing and oversight. The gold refinery in Ouagadougou, the oil refinery in Lamu, Ghana's special share with its veto right, Kinshasa's annual subcontracting audit, Zimbabwe's raw mineral ban and Niger's 40 percent stake in Madaouela point in the same direction. All of them run up against the same limit. The refinery lacks the gold to fill it. Lamu lacks the crude oil to process and a completed feasibility study. Botswana lacks the fiscal space to buy De Beers. The claim of sovereignty is proclaimed by building facilities. The flow of raw material, however, remains in the hands of informal networks, and financing remains in the hands of rating agen-

cies and external partners. In Sudan only a quarter of eight billion dollars of gold reaches the treasury. In South Africa a tavern massacre is linked to a score-settling over illegal mining. In Arlit cocaine was seized. These are reminders that such networks settle in wherever state capacity has emptied out.

On the energy side the Hormuz-driven supply shock is affecting the continent in two different ways. In Mozambique, Angola, Algeria and Namibia the premium on supply from outside the Middle East is accelerating investment decisions. The power cuts in Senegal, the fuel queues in Sudan, the strike threat in Nigeria, the 40 percent fall in customs revenue in Somalia and gas-exporting Libya's debate over gas imports form the consumer face of the same shock. The calendar of the coming days will test most of these lines. The 4+4 committee meets in Tunis on 4 October. The verdict in the coup trial in Nigeria is expected on 5 October. The Security Council votes on Sudan sanctions on 8 October. The Lamu land case is heard on 14 October, and the Western Sahara vote takes place on 31 October. The week left the following main questions open. Will the federal advance, now 39 kilometres from Mekelle, stop before the city? Will the RSF, driven out of North Kordofan, withdraw to Darfur or expand its drone campaign? Who will fill the gap left by the troops that Ethiopia withdraws from Somalia?



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