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EDITOR'S NOTE

Africa's security and economic agendas moved along increasingly connected tracks this week. In Sudan, territorial claims and drone attacks unfolded alongside a worsening hunger emergency and a fuel shortage that complicated civilian returns. In eastern Congo, Joseph Kabila's leadership of a new political-military coalition changed the opposition's organisational framework while leaving the central questions of ceasefire compliance, foreign military involvement and civilian protection unresolved. Renewed fighting in northern Ethiopia brought military operations closer to the Eritrean border, increasing the risk that domestic conflict could widen across states.

The Sahel presented a different combination of pressures. Mali's armed forces publicised operations around Kidal and against armed-group logistics, while jihadist and separatist organisations claimed attacks on roads and military positions. Yet the region's external relationships continued to diversify. Niger reached a staff-level agreement with the IMF, Mali prepared further financial discussions while maintaining its Russian security partnership, and Washington pressed for restraint in the Horn of Africa. These contacts suggest selective engagement based on immediate security and economic needs.

Energy and mining developments showed why that engagement remains necessary. New drilling commitments, gas-processing plans, electricity links and mineral-processing investments continued despite political uncertainty. Their practical value depends on conditions that announcements alone cannot supply: reliable power, workable financing, secure transport, enforceable agreements and acceptance by affected communities. Zimbabwe's processing delays, Sudan's mining-community settlement and the DRC's proposed foreign-exchange reforms each demonstrated a different part of that challenge.

By 16 October, the agenda had widened further. Sudan faced renewed allegations of civilian deaths from airstrikes as Washington pressed for a humanitarian truce. Congo restricted opposition-party activities and presidential contacts with Belgium, Morocco installed a new government, and new financing and processing announcements highlighted both resource opportunities and implementation risks.

CONFLICT AND WAR

SUDAN

Sudan's western and southeastern fronts remained active, with conflicting battlefield narratives and continuing exposure of civilians to artillery and drones. The government attributed suicide-drone attacks on El Obeid to the Rapid Support Forces, reporting injuries and damage to homes and property. The attacks reinforced the vulnerability of North Kordofan's principal urban centre even as the army and allied forces publicised advances elsewhere.

In West Darfur, Governor Bahr al-Din Adam Karama said on 14 October that the army and its allies had captured Bir Kelekel in the Jebel Moon area. The RSF did not immediately provide a response in the report. This was a claim of a local advance within a region where control remained contested; it did not establish a wider reversal of the war's territorial balance.

The Blue Nile front also carried substantial civilian risks. Wad al-Mahi's commissioner accused the RSF of striking Umm Darfa hospital with drones on 11 October. His account followed reports of lethal attacks in surrounding communities. In South Kordofan, the Sudan Doctors Network attributed the deaths of a mother and her three children in Dilling on 10 October to shelling by forces associated with Abdelaziz al-Hilu's SPLM-N. These accounts came from officials and medical monitors rather than a common, independently verified casualty assessment.

The humanitarian deterioration was clearer than the battlefield balance. An IPC alert warned that famine risk was increasing in Greater Darfur and Greater Kordofan as war combined with drought, restricted access and inadequate funding. Surveys in two displacement camps in Eastern Jebel Marra found acute child malnutrition at 38% and 30.8%. Thirteen of seventeen surveys across Greater Darfur since January recorded critical levels. The Famine Review Committee nevertheless stressed that available survey data were insufficient for a full analysis; the alert should not be read as a new nationwide famine classification.

UNICEF projected that 825,000 children under five would experience severe acute malnutrition during 2026. The figure is an annual estimate, not a count of new cases during this week. Funding shortfalls continued to constrain access and treatment capacity. Military developments offered little reassurance that food systems, hospitals and civilian routes would become substantially safer.

Late-week allegations added to concern over aerial attacks. Emergency Lawyers said a Sudanese army strike on Abu Zaima in North Kordofan killed five children from one family and injured their mother. Separate local accounts described civilian deaths and damage to food-transport vehicles in West Kordofan on 14–15 October.

On 16 October, the RSF alleged that a strike on Nyala's livestock market killed at least thirty civilians. Other reporting cited military sources describing targets near the market as RSF positions. The tolls, aircraft identification and competing accounts of targets remained unverified.

Cross-border displacement continued to compound Sudan's own emergency. UNHCR figures reported on 16 October recorded 324,631 arrivals from South Sudan between April 2025 and October 2026, comprising 101,031 South Sudanese nationals and 223,600 Sudanese returnees. White Nile and Blue Nile were among the main reception areas. This eighteen-month movement placed additional pressure on sanitation, shelter and healthcare in communities already affected by war.

SOUTH SUDAN

South Sudan's political crisis was accompanied by both communal violence and fragmentation within the armed opposition. Fighting around Rumbek in Lakes State left about seventy people dead, including four soldiers, according to an Information Ministry account reported during the week. Officials said the exact toll had not been verified. Armed youths from the Pakam and Nyang communities were involved, and the hospital faced a large influx of wounded people. Patrols and a night curfew formed part of the response.

In Unity State's Leer County, forces aligned with rival SPLM-IO acting leaders Regina Joseph and Oyet Nathaniel clashed in Rupkong and Bow. Representatives of the two factions gave incompatible casualty figures. The fighting showed that the opposition's leadership dispute had developed an armed local dimension, further complicating efforts to treat it as a single negotiating actor.

Riek Machar, meanwhile, used his continuing court testimony to describe his prosecution as politically motivated and challenge constitutional changes and election arrangements. These were his defence arguments rather than judicial findings. The court dispute, opposition fragmentation and communal fighting together placed additional pressure on the already fragile political settlement.

UNMISS pursued local protection work in Western Equatoria. Mission head Anita Kiki Gbeho discussed civilian-protection planning, humanitarian access and support for dialogue with the caretaker administration in Yambio. Such local cooperation remained important, but it could not by itself resolve the national political confrontation.

DRC AND RWANDA

Joseph Kabila's assumption of leadership of the Front pour la Refondation de la Nation, or FRN, brought the former president into an explicit political-military leadership role. Reuters reported on 12 October that the coalition was being established to replace the AFC-M23 alliance, with Corneille Nangaa, Bertrand Bisimwa, Freddy Kaniki and Sultani Makenga named as deputies. Kabila had previously denied supporting the rebellion. His new position linked the eastern conflict more directly to the struggle over national power.

The organisational change did not settle the status of existing peace commitments. It also coincided with continued pressure on civilian movement. Local sources told Actualite.cd that FRN representatives halted traffic on the Nyabiondo–Mutongo–Pinga road from 14 October after renewed fighting with Wazalendo groups. Drivers were reportedly informed verbally, and a barrier prevented vehicles from passing. The report described rising prices in affected markets, illustrating how control of a road can affect civilian welfare without a major change in the frontline.

In Ituri, the Islamic State's Central Africa Province claimed attacks on barracks, soldiers and militia patrols around Malindi, Kasila, Matiti and other localities. It also claimed killings of civilians. These statements remained organisational claims and cannot be combined into a verified casualty total. Separately, a 9 October report described an ADF attack at Longela on 7 October that killed two civilians, according to local civil society. That incident preceded the reporting window but formed part of the continuing insecurity around Mambasa.

The crisis also continued to generate protection needs beyond the M23/FRN front. MONUSCO-related reporting described thousands of displaced people seeking protection near bases in Ituri. The coexistence of armed-group attacks, road restrictions and displacement demonstrates the limits of a peace framework focused solely on the principal interstate dispute.

The confrontation also extended to formal politics. Interior Minister Jacquemain Shabani announced on 15 October a ban on the activities of thirteen parties, including Kabila's PPRD and other opposition organisations. The government invoked national security, while opponents described a restriction on pluralism. The measure concerned party activities and was not reported as formal dissolution. It brought the dispute over the new armed coalition into a broader argument over the boundaries of lawful political opposition.

AES STATES

Mali's army continued Operation Dougoukoloko across northern and central areas. On 9 October, it said it struck two vehicles southwest of Kidal that were preparing to attack a military convoy. During the reporting period, military accounts continued to emphasise pressure on armed-group transport and logistics. The claims describe the army's operational assessment; they do not establish an independently verified total of enemy losses.

During a weekend visit to Kidal, Chief of General Staff Jean Élysée Dao said operations would continue beyond the city. He credited preparatory attacks on weapons and logistics and acknowledged Africa Corps support. The military's message emphasised extending territorial security, but the reports did not provide a consolidated, independently established casualty assessment. Somadougou and the Dougabougou–Markala route. The Azawad Liberation Front claimed kamikaze-drone attacks on army and Africa Corps positions at Soumpi. These claims suggest persistent pressure on movement and outlying positions, although their operational effects were not independently established.

Mali also inducted 2,400 National Youth Service trainees, including 800 women, into the armed forces' strategic reserve after six months of military and civic training. The intake expands the reserve framework; it should not be equated with the immediate deployment of 2,400 additional frontline combatants.

JNIM offered a competing account of the week. It claimed improvised-explosive-device attacks against Dozo, army and Africa Corps vehicles, together with ambushes around In Burkina Faso, JNIM claimed attacks on army and Volunteer for the Defence of the Homeland positions at Gomboro, Namssiguia Ouahigouya. ISSP separately claimed to have repelled a JNIM attack at Gonadaouri in Oudalan. Its exceptionally high claimed enemy toll lacked independent corroboration. The accounts point to overlapping state-insurgent and inter-organisational contests.

In Niger, ISSP claimed an attack on an army patrol near Faska in Dosso, alleging five soldiers were killed. Three soldiers captured by the MPLJ at Siguidim were reportedly released. The available material did not establish the terms of that release. Across the AES, the week's evidence supports a picture of sustained military pressure and contested mobility, with significant uncertainty surrounding claims of losses and control. A 16 October account placed the inter-group conflict in the tri-border area within a wider escalation between JNIM and Islamic State's Sahel branch. It described fighting on 9 October and an Islamic State claim of more than four hundred JNIM fighters killed. That figure lacked independent confirmation and is not an established death toll.

NIGERIA

Nigeria's military announced substantial losses inflicted on ISWAP, but attacks on bases and civilian livelihoods continued. An army statement said an airstrike at Badu village, south of Gudumbali in Borno's Guzamala area, killed more than forty ISWAP fighters, including a senior commander, on 10 October. It also reported destruction of two vehicles and about twenty motorcycles. The figures came from a preliminary military assessment.

In Adamawa, the army said it repelled an assault on the Garaha forward operating base in Hong, killed six attackers and recovered weapons and ammunition. The statement acknowledged military casualties without providing a complete count. These tactical accounts illustrated continued air and ground activity but did not establish that the insurgents' capacity to mount further attacks had been eliminated.

Reuters reported on 15 October that suspected Boko Haram fighters had attacked a base in Guzamala on the night of 13 October, killing at least ten soldiers and wounding at least twenty people, according to military sources and residents. Sources also reported at least five civilian deaths and the killing of a forest guard, destruction of military vehicles and fires in parts of nearby Mairari. An account from a local council chairman described the attack as repelled and said casualty information was unclear. The differing accounts leave the final balance unresolved; they should not be reconciled by simply selecting one side's success claim.

Before the base assault, fighters reportedly seized more than forty fishing boats at Tumbun Barebari. That incident highlighted the threat to transport and income around Lake Chad. ISWAP separately claimed operations around Kukawa, Damasak, Wulgo, Geidam and other locations. Those claims concern distinct reported events and do not supply a verified combined death toll.

In Kebbi, the army announced that it repelled a Lakurawa attack on the Maiyama forward operating base. At the policy level, Nigerian officials warned that armed groups were exploiting emerging technologies and illicit financial networks. Calls for better intelligence sharing, early warning and predictable African peace-operation financing reflected the challenge of sustaining protection across several affected regions at once.

SOMALIA

Somalia faced simultaneous pressure from Al-Shabaab, regional political disputes and confrontation in the capital. Government forces said Gorgor commandos killed two Al-Shabaab fighters and captured another during a 14 October operation at Hinshiloole, between Baidoa and Deynunay in Bay. No government casualty figure was provided. Elsewhere, Al-Shabaab was reported to have captured Hees, about thirty kilometres from Beledweyne, after fighting with the army.

In Mogadishu, NISA accused armed men associated with former president Sharif Sheikh Ahmed of threatening security and forcibly entering homes in Tiintinley, Wadajir. The allegation arose amid heightened government-opposition tensions and reports of troop movements. NISA's account does not constitute an independent finding about responsibility, but the dispute showed how security institutions were becoming entangled in the political confrontation.

The Bay region presented a further armed challenge. On 15 October, forces loyal to former South West State president Abdiiaziz Laftagareen claimed to have entered Buurhakaba after fighting federal and regional government forces. Hiiraan Online said control of the town could not immediately be determined independently. Federal authorities had also placed Laftagareen and nine others on a financial sanctions list over alleged Al-Shabaab links; the individuals denied such connections, and evidence against each person was not publicly disclosed in the report. The fighting expanded a conflict over regional authority at a time when the same area remained central to counter-insurgency operations.

In Gedo, Beled Hawo was reportedly returned to Jubaland's administration following peace talks, indicating that negotiated arrangements continued alongside confrontation elsewhere.

The regional dimension also remained unsettled. Reporting citing AFRICOM raised concern about a possible Houthi presence in northern Somalia and potential transfers of weapons, training or drone expertise to Al-Shabaab. Public reporting had not established the extent of such a presence or an operational alliance. The significance lies in the potential interaction between Somalia's internal fragmentation and insecurity across the Gulf of Aden, rather than evidence of a completed joint military structure.

LIBYA

Libya's political divisions continued to carry direct security and human-rights consequences. In her 14 October Security Council briefing, UN envoy Hanna Tetteh welcomed cooperation between eastern and western military institutions but warned that security remained fragile, particularly in the south. Joint coordination efforts did not remove the wider problem of divided command structures and uneven state authority.

Tetteh also raised concern over the execution in Benghazi of fifty-eight people convicted of terrorism-related offences and called for a halt to further executions. The issue placed criminal justice, detention practices and accountability alongside the more familiar dispute over elections and executive authority.

Southern border insecurity remained connected to trafficking and population movements. France urged stronger east-west security cooperation along borders with Niger, Chad and Sudan. These concerns also formed part of the environment in which European migration cooperation expanded towards eastern Libya. The resulting engagement with territorial authorities may improve operational coordination, but its effects on protection and accountability require separate assessment.



ETHIOPIA

Federal and allied forces reported further advances in Tigray during the week, while the proximity of fighting to Eritrea increased concern about interstate escalation. Witnesses told APA that federal troops entered Shire and Adigrat after Tigrayan fighters withdrew. Ethiopian Airlines announced the resumption of Mekelle services following the government's earlier recapture of the regional capital. Resumed flights and control of cities did not establish that the wider conflict had ended.

Reports also described Eritrean involvement in fighting and Ethiopian drone strikes against troops and equipment. Eritrea denied the incursion allegations. AFP said it could not independently verify claims by a pro-government militia that Eritrean troops had suffered heavy losses and were retreating. The dispute must therefore remain attributed, especially as allegations of cross-border action can themselves intensify escalation.

TPLF leaders were reported to be shifting towards mobile warfare after losing urban positions. Humanitarian reporting described about one million people still displaced in Tigray and nearly four million requiring urgent assistance. These are wider crisis estimates, not new weekly displacement totals.

Fighting also continued in Amhara. Residents around Wegeltena described army-Fano clashes, civilian injuries and departures from homes, with exchanges extending across several districts. Ethiopia's security challenge consequently remained dispersed across multiple fronts even as attention concentrated on the north. A local military gain in Tigray could coexist with increased pressure elsewhere and a more dangerous regional confrontation.

On 16 October, reporting on Marco Rubio's call with Abiy Ahmed emphasised the need for de-escalation, respect for neighbouring states' territorial integrity and renewed dialogue under the 2018 Ethiopia-Eritrea agreement. Human Rights Watch separately described reports of shelling that killed or injured civilians and closed health facilities in southern Tigray. Its account did not attribute all shelling to a named force. Independent monitoring, restored communications and humanitarian access remained important constraints on assessing the fighting's civilian effects.



MOZAMBIQUE

President Daniel Chapo said illegally held firearms would be forcibly collected after a police amnesty expires in December. People surrendering weapons before the deadline were promised protection from punishment for doing so. Speaking at a special-operations training ceremony, Chapo also stressed discipline, legal compliance and respect for fundamental rights.

The announcement placed firearms control within a wider agenda covering organised crime, kidnapping, trafficking and insurgency. Chapo described security in Cabo Delgado as improved compared with the preceding two years, crediting Mozambican forces and support from Rwanda and Tanzania. The account also recalled an August UN warning that attacks on civilians had become more frequent and severe. These assessments measure different aspects of the situation and leave civilian protection an unresolved concern.

The firearms initiative is therefore a prospective enforcement policy rather than evidence that the northern insurgency has been contained. Its implementation will depend on local compliance, the conduct of security forces and their ability to distinguish disarmament from actions that further alienate communities.

SOUTH AFRICA

South Africa's security concerns intersected with migration and foreign military recruitment. Nigeria condemned the death of a citizen in South African police custody and sought an investigation, while other reporting described Nigerians returning amid attacks and insecurity. Such accounts reinforced the diplomatic consequences of threats facing migrant communities.

A separate 9 October case concerned six Zimbabwean men who pleaded guilty over plans to travel through South Africa to join Russia's military. They received five-year prison sentences wholly suspended for five years under the plea arrangement. Four reportedly expected signing payments of \$25,000 and monthly salaries of \$2,500; two others helped organise travel. The case involved unauthorised foreign military participation, not a finding about every African recruitment network mentioned in related reporting.

Together, the cases illustrated how South Africa's domestic policing and transit role can create cross-border political consequences. Investigations, court conditions and consular demands remained distinct processes, with different standards of proof and responsibility.



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DIPLOMACY

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SAHEL DIPLOMACY

Sahel governments maintained several external channels while preserving their emphasis on sovereignty. In Mali, the US embassy brought together exchange-programme alumni, embassy specialists, the US International Development Finance Corporation and AmCham Mali around trade and investment. Those contacts indicated continued commercial diplomacy alongside Bamako's Russian security relationship. Burkina Faso's recently established dialogue with Washington provided background to this pattern of selective engagement.

Financial engagement developed in parallel. Niger and IMF staff reached agreement on a proposed thirty-eight-month Extended Credit Facility of about \$203 million, or CFA118 billion. Executive Board approval remained outstanding, with consideration expected in early December. Mali, following an IMF mission on 5–9 October, was preparing formal discussions on a possible facility; its amount and conditions had not been settled. The two cases were therefore at different stages and should not be presented as approved financing already available to governments.

Regional economic coordination also advanced through AES-Togo customs discussions on 12–14 October. Experts worked on a preferential tariff framework, rules of origin and certification procedures. This was preparatory work rather than an already operational trade regime. It nevertheless showed the importance of coastal access and practical customs arrangements to the landlocked bloc.

Relations with France remained strained. Niger's government condemned the expulsion of two embassy security agents, presenting its account publicly on 13 October. The expulsions themselves occurred in September, and the French side had not commented in the cited report. Meanwhile, Defence Minister Salifou Mody met Algeria's military leadership and President Abdelmadjid Tebboune. Diplomatic diversification thus proceeded alongside unresolved bilateral disputes.



RUSSIA AND AFRICA

Russia's ambassador in Bamako, Igor Gromyko, outlined preparations for the Russia-Africa summit scheduled for 28–29 October in Moscow. He described a programme covering sovereignty, trade, investment, technology, energy and education, and highlighted the institutional development of Russia-AES relations. His remarks also foregrounded Africa Corps support for Mali's armed forces.

The presentation showed Moscow's effort to place a military partnership within a wider economic and diplomatic agenda. Its practical significance will depend on the agreements and follow-through emerging from the summit; the preparatory statements did not themselves establish new investments.

Mali also pursued other bilateral channels. Foreign Minister Abdoulaye Diop met Rwanda's Olivier Jean Patrick Nduhungirehe in Bamako on 12 October to discuss cooperation, existing agreements and regional security. Türkiye's President Recep Tayyip Erdoğan received Malian ambassador Oumarou Maiga for the presentation of credentials. These contacts reflected the breadth of Bamako's external relationships even as Russia remained prominent in its security diplomacy.

LIBYA

The 4+4 process faced a sharper implementation test. Hanna Tetteh welcomed the 30 August agreement envisaging presidential and parliamentary elections within twenty-four months under a unified executive. She said the House of Representatives endorsed it in September, whereas the High Council of State rejected it on 5 October over legal and constitutional objections. Her planned consultations on a broader national mechanism showed that the UN was seeking ways to sustain the roadmap despite that divide.

The dispute over parliamentary leadership also developed a legal dimension. The eastern constitutional court said absolute majorities should be calculated from legally serving members, excluding vacant seats. The House rapporteur described a current membership of 160 and a threshold of eighty-one. The interpretation affected arguments over decisions preceding Al-Salheen Abdel-Nabi's election as speaker, but it did not by itself settle the wider legitimacy dispute.

At the Security Council, Washington warned that actors obstructing the transition could face UN sanctions and urged electoral legislation and a unified executive. France supported the process while emphasising military unification and financial accountability. Russia stressed inclusive dialogue and warned against excluding existing institutions. Their positions converged on political progress but differed over how to secure it.

European engagement expanded through an additional €25 million commitment for migration cooperation in eastern Libya. The funding concerned territory controlled by Khalifa Haftar's forces, while the EU formally recognised the Tripoli-based government. The arrangement illustrated the distinction between formal diplomatic recognition and operational dealings with authorities controlling departure routes. Human-rights concerns over interception and return remained unresolved.



SUDAN

Abdel Fattah al-Burhan said on 15 October that he had written to President Donald Trump, reiterating his commitment to ending Sudan's war. The letter came amid US-led efforts involving Saudi Arabia, the UAE and Egypt to secure a ninety-day humanitarian truce. It indicated continued diplomatic engagement, but did not amount to acceptance of all terms or a ceasefire entering into effect.

At the Security Council on 16 October, the United States called for a humanitarian truce, wider restrictions on weapons supplies and stronger sanctions. China and Russia opposed expanding the embargo, arguing for enforcement of existing measures and warning against additional pressure that could undermine Sudan's institutions or territorial integrity. The exchange exposed disagreement over the instruments of pressure even where members expressed support for humanitarian relief.

Sudan's representative said a viable truce required RSF withdrawal from civilian facilities to monitored assembly points, the removal of foreign mercenaries and an end to outside weapons and financial support. Those conditions left substantial differences over sequencing and enforcement. Humanitarian access, including permissions and air routes for relief personnel, remained an immediate concern while the broader political settlement remained distant.

MOROCCO

King Mohammed VI's parliamentary address placed youth opportunities and cooperation with Spain among the week's political priorities. The emphasis on employment, public services and regional development linked domestic expectations to Morocco's wider investment and international agenda.

On Western Sahara, African and Gulf states reiterated support for Morocco's autonomy proposal during UN-related diplomacy. These statements represented the positions of participating governments rather than a negotiated settlement of the territory's status. Rabat continued to seek international consolidation of its preferred framework.

Migration remained a related source of regional pressure. Reporting on unaccompanied teenagers in Ceuta described inadequate shelter, while new IOM data warned against treating falling arrivals on one route as proof of lower migration pressure overall. Changes in departure points and longer journeys can redistribute risk rather than eliminate it. The practical challenge for Morocco and its neighbours therefore remained broader than border-control statistics.

A more immediate domestic change followed on 16 October, when King Mohammed VI appointed a new government headed by Fatima Zahra El Mansouri. Nasser Bourita retained the foreign-affairs portfolio and Abdelouafi Laftit remained interior minister. Fouzi Lekjaa took the economy and finance brief, while Charafat Afailal was appointed to energy, mining and sustainable development. Continuity in key security and diplomatic posts accompanied changes relevant to investment, public finances and resource policy. The new administration's decisions will determine how the youth and service-delivery priorities raised earlier in the week are translated into programmes.



EGYPT

Egypt's diplomatic activity combined Horn of Africa coordination with an effort to attract investment and broaden Asian partnerships. Foreign Minister Badr Abdelatty and Sudan's Mohamed Salah reaffirmed cooperation and support for sovereignty and territorial integrity in a 12 October call. They also discussed follow-up to consultations involving Egypt, Sudan, Eritrea and Somalia.

Cairo announced twenty agreements and memoranda following President Abdel Fattah el-Sisi's tour of South Korea, Malaysia and Indonesia. The documents covered areas including energy, manufacturing, technology, maritime cooperation and education. They established cooperation frameworks whose economic impact depends on implementation, financing and private-sector participation. The regional backdrop remained sensitive. Somalia publicly rejected the interpretation that its attendance at consultations with Egypt, Eritrea and Sudan made it part of an anti-Ethiopian alliance. Cairo's diplomatic reach therefore coexisted with efforts by partners to preserve room for manoeuvre. Its expanding industrial partnerships, including electricity-storage cooperation discussed in the Energy section, offered an additional channel of influence beyond security coordination.

Border trade with Sudan became more constrained by 16 October. Egyptian authorities halted commercial trucks heading through the Qustul land port until further notice, while passenger vehicles and travellers were exempted. Reporting linked the restriction to conditions in northern Sudan and protests disrupting the Sudanese Ashkeit and Argeen crossings over import controls and customs charges. The measure affected a specific commercial corridor; it was not a general suspension of all movement between the two countries. Delays risked worsening supply pressures in Sudan while adding costs for traders.

DRC RWANDA ERITREA

The United States used the 13 October Security Council meeting to press Congo and Rwanda to implement their peace commitments, respect the ceasefire and end drone attacks. Ambassador Michael Waltz called for Rwanda's unconditional military withdrawal and an end to support for M23, while also urging continued neutralisation of the FDLR. Washington linked accountability for civilian abuses to action against illicit resource exploitation.

Kinshasa pursued its own implementation narrative. Minister Floribert Anzuluni briefed EU and Belgian officials in Brussels on 12 October about FDLR disarmament, demobilisation and cantonment, presenting a roadmap for subsequent stages. The meetings were evidence of diplomatic engagement, not independent verification that disarmament had been completed. Kabila's new FRN complicated the negotiating framework. Jurist Roger-Claude Liwanga urged written framework. Jurist Roger-Claude Liwanga urged written clarification of its legal relationship to AFC/M23 and earlier Doha commitments. The presence of former leaders in the new structure did not automatically resolve succession to obligations, and a name change should not be assumed to cancel a ceasefire. A meeting of five Great Lakes defence ministers planned for 18 October offered a further prospective coordination channel on foreign armed groups.

In the Horn, the disputed role of Eritrean forces in Tigray prompted renewed calls to prevent cross-border escalation. US Secretary of State Marco Rubio stressed sovereignty and territorial integrity in a call with Prime Minister Abiy Ahmed. Eritrea denied the incursion reports and accused Ethiopia of using the conflict to pursue access to Assab. The combination of contested military information and maritime-access disputes made restraint an urgent diplomatic concern.

Relations between Kinshasa and Brussels deteriorated at the end of the week after Belgian searches connected to a money-laundering investigation involving alleged Congolese mining revenues. On 16 October, the Congolese presidency instructed its staff to suspend direct or indirect contact with the Belgian Embassy, routing necessary communications through the Foreign Ministry. The directive applied to presidential personnel and did not itself announce a general severance of diplomatic relations. The underlying allegations remained under investigation, with no established court finding against the individuals concerned.

SOMALI DIPLOMACY

Somalia sought external support while trying to preserve flexibility in a tense region. Army commander Ibrahim Mohamed Mohamud asked Uganda to expand training and mentorship during talks with Muhoozi Kainerugaba in Entebbe. The commanders also discussed economic and social cooperation. Turkish personnel at TURKSOM separately met Gorgor and military-police personnel in the Jazeera area near Mogadishu. Claims of a Pakistani JF-17 procurement agreement require particular caution. Garowe Online presented a purchase as agreed and repeated estimates of up to twenty-four aircraft worth about \$900 million. However, a separate 14 October account reviewed earlier claims and found no public confirmation by either government of a final contract, quantity, price or delivery schedule. Documented defence contacts and the presentation of an aircraft model support the existence of engagement; they do not establish a completed purchase or operational capability.

Somaliland continued its separate external campaign. Officials emphasised cooperation with Ethiopia over Berbera port and held defence discussions in Hargeysa. Somaliland welcomed President Donald Trump's rally remarks describing it as separate from Somalia, but the reporting did not establish formal US recognition or a change in policy. Port access, defence contacts and recognition lobbying remained connected ambitions rather than a single concluded agreement.

CHAD AND ZAMBIA

Chad and France signed a defence-cooperation declaration of intent during President Mahamat Idriss Déby Itno's Paris visit on 13 October. It covered training, expertise, technology and defence-industry cooperation. The declaration did not announce the reopening of French bases or a new troop deployment. It followed Chad's termination of the previous defence agreement and France's completed withdrawal in January 2025, illustrating a more limited re-engagement.

Zambia was elected to the UN Human Rights Council for the 2027–29 term, receiving 177 votes from 181 valid ballots in the General Assembly election. Its membership begins on 1 January 2027. Burundi, Ghana and Nigeria were also elected. President Hakainde Hichilema linked the mandate to citizens' experience of rights at home as well as Zambia's international representation. The election provided a diplomatic platform whose significance will depend on the positions and practices that follow.

REGIONAL HEALTH

The Ebola emergency in the DRC acquired further cross-border significance. Reporting on 16 October, citing health officials speaking to Reuters, described two cases in North Ubangi near the Central African Republic, while noting that the provincial spread had not yet been formally announced by Congolese authorities. Kenya's Health Ministry separately confirmed a third case in a relative of the first two patients and said there was no evidence at that stage of wider community transmission. These developments increased the importance of contact tracing and coordination between neighbouring health systems.

The response also faced an accountability dispute. Africa CDC said approximately \$962 million had been disbursed to implementing organisations, while organisations attending a financial review disclosed receipt of only \$228 million. The resulting reporting gap was not proof that more than \$700 million had been stolen. The agency demanded fuller disclosure so authorities could determine available resources and coordinate the response. With conflict already complicating access and public trust, incomplete financial reporting risked further weakening cooperation.



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ENERGY

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ANGOLA

Angola's offshore sector secured a longer operating horizon through a contract extension for the Sonangol Libongos ultra-deepwater drillship. Sonadrill, Seadrill's equal joint venture with a Sonangol affiliate, exercised remaining priced options that extend the rig's commitment by about three years to January 2030.

The development is a concrete drilling-service commitment rather than an announcement of newly discovered reserves. It supports continuity for the offshore supply chain and gives the contractor greater revenue visibility. Angola's ability to retain such equipment remains relevant to sustaining exploration and development activity in mature producing areas.

LIBYA

Libya's energy position continued to combine substantial export income with costly domestic supply weaknesses. January–September showed total revenue of 114.58 billion dinars, including 94.2 billion from oil sales and 17.4 billion from oil royalties. The UN briefing exposed the other side of that balance. Tetteh said Libya imported 8.15 million tonnes of fuel worth \$8.9 billion over the same period. Estimates presented to the Council put smuggling losses at 30–50% of imports. Pipeline disruptions in September also cost roughly one million barrels of production. The figures show the fiscal scale of supply-chain leakage and infrastructure interruption, although the smuggling range remained an estimate. Brega announced the arrival at Benghazi's Jiliana port of a 30,000-tonne gasoline cargo, divided between Ras Al-Mungar and Tobruk. It also outlined western distribution arrangements and a planned storage depot at Tajoura. Deliveries address immediate availability; a new depot would require construction and commissioning before adding capacity. Libya examined stronger electricity exchanges with Egypt and links through Tunisia and Algeria, alongside possible LNG imports and floating regasification. These remained options and planned network developments. Their value depends on Libya's internal transmission system as well as supply from neighbours. External commercial diplomacy continued in Riyadh. Pakistan encouraged its refiners to consider Libyan crude as a diversification option, while Libyan officials discussed investment, technology and training with Saudi Arabia. These contacts broadened potential relationships but did not establish completed new supply contracts or investment disbursements. A 16 October report quantified the fiscal exposure more directly, putting estimated diversion of imported fuel at \$2.4–4.4 billion over January–September, based on the UN briefing. The range matters: it describes estimated leakage over nine months, rather than an audited loss of a fixed amount.

MOZAMBIQUE

Gridworks sought contractors for the second and third phases of the Chimuará–Nacala transmission project, with prequalification applications due on 24 November. The proposed infrastructure covers roughly 460 kilometres of transmission lines and associated substations, with estimated investment of \$450 million.

The project is intended to move solar and hydropower electricity northwards, enable about 600 MW of generation capacity and support a possible future Tanzania connection. These are project objectives rather than electricity already delivered through completed assets. Financing, approvals and environmental and social requirements remain necessary before financial close and construction.

The development reinforces the importance of the grid alongside generation investment. In provinces with low access, a power project's national capacity figure gives only a partial account of its usefulness. Transmission, distribution and the commercial arrangements connecting customers to supply remain essential to both industrial demand and household access.



UGANDA ZAMBIA AND REGIONAL POWER

Zambia's energy figures showed a substantial shift towards solar after the drought-related hydropower shock. The government said total installed capacity increased from 3,777 MW in 2024 to 4,722 MW in 2026, with solar accounting for 849 MW of the 945 MW net increase. Solar therefore contributed nearly 90% of new capacity, rather than 90% of the country's total electricity supply.

Regional network investment also remained important. Reporting during the week discussed Gridworks' intended majority investment in the proposed Kalumbila–Kolwezi interconnector between Zambia and the DRC. The initial announcement was made on 6 October, before this bulletin's window. The approximately \$300 million project, designed for up to 550 MW of transfers, still awaited financial close. Uganda's Amari substation investment provided a separate example of the same focus on transmission modernisation.

The combined picture is one of diversification supported by trading and network infrastructure. Mining demand can create a market for additional power, but installed capacity, available generation and electricity actually reaching customers remain different measures.

NIGERIA

Shell agreed to sell its entire interest in Shell Nigeria Gas Group to Vaaris Energy as part of its portfolio restructuring. The agreement shifts prospective ownership of a domestic gas-distribution business towards a Nigerian company while Shell emphasises deepwater and integrated gas activity. Signing and completion remain separate stages, and the available material did not establish a completed transfer.

Aliko Dangote said his refinery aimed to reach 1.4 million barrels per day of capacity by early 2029 and described further petrochemical expansion. These were management targets presented during an investor roadshow, not present production levels. Nigeria's continued imports and debate over domestic crude allocation showed that additional processing ambition must be assessed alongside feedstock, pricing and distribution constraints.

The government also introduced a more coordinated security framework for the oil and gas sector and created a committee to protect electricity infrastructure against vandalism. Such measures link energy performance directly to security administration. They will be judged by reduced disruption and improved supply rather than the creation of coordinating bodies alone.

Electricity pricing remained contested. An adviser argued that operational losses should not simply be passed through to consumers. The issue connects investment incentives and utility finances to the affordability concerns also visible in petrol and transport markets. Nigeria's energy transition consequently continued to involve hydrocarbons, gas-based transport, grid reform and public purchasing power at the same time.

Renaissance Africa Energy relaunched a contractor-financing scheme with thirteen banks after an agreement signed in Lagos on 14 October. The company described a subscribed dollar portfolio of \$4.1 billion alongside a separate local-currency facility. Eligible contractors could seek financing against verified work, subject to bank approval. The commitments represented lending capacity rather than funds already disbursed. The scheme addressed the working capital required to mobilise equipment and service companies at the former Shell onshore assets, with its practical effect dependent on borrowing terms and take-up.

SUDAN

Sudan's fuel shortage complicated the return of displaced residents to Khartoum. Former energy minister Mohamed Abdallah Mahmoud blamed foreign-currency shortages and import restrictions, particularly the requirement for importing consortia to lodge 200 kilograms of gold as collateral. His criticism was an attributed assessment of policy effects, not an official finding that the guarantee alone caused the crisis.

On 12 October, the Energy and Oil Ministry opened Jet A-1 and furnace-oil imports to qualified local companies. However, the report said the gold-guarantee and central bank approval requirements still applied. The change broadened eligibility in specified products without resolving all financing barriers facing importers. A major outage on 12 October affected Khartoum, White Nile and North Kordofan, with disruption also reported at Merowe's generating system. The immediate cause and restoration timetable were initially unclear. Combined fuel and electricity shortages threatened transport, water provision, healthcare and the commercial activity needed for civilian recovery. The relationship between gold and fuel was particularly significant: a mineral central to wartime income also served as a financing condition for essential imports. Policy choices over guarantees, market entry and foreign exchange therefore had consequences well beyond the petroleum sector.

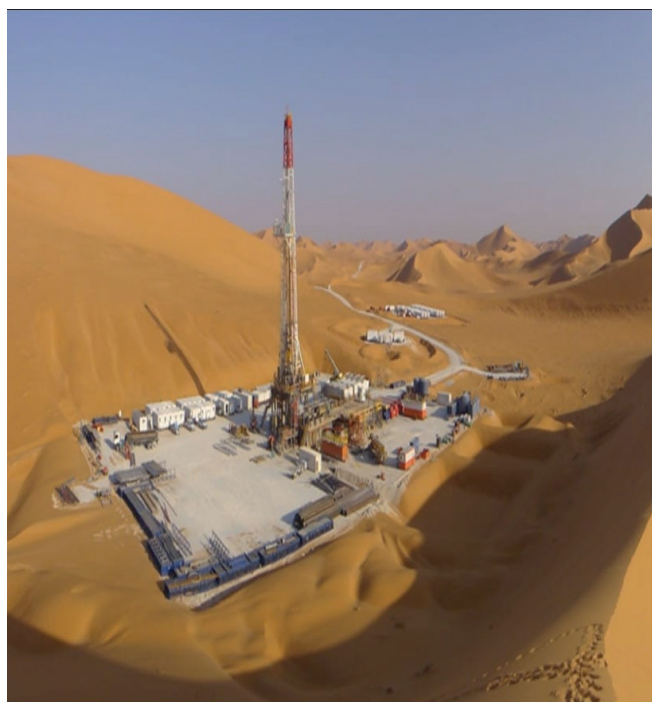
NIGER AND ALGERIA

Niger's Goumeri W8 oil well in the Agadem block remained only partly contained as of 12 October following a blowout that began on 25 September. Authorities described a serious environmental incident and reported two injured workers. They said neighbouring wells on the platform were also affected and announced an independent investigation with Algerian expert support.

The Petroleum Ministry ruled out criminal or terrorist explanations at that stage, while the technical cause remained under investigation. The distinction matters in a country where security concerns can otherwise overshadow industrial and environmental failures. Risks to soil, pasture, livestock and water resources made full containment and assessment immediate priorities.

The incident also qualified the positive macroeconomic narrative surrounding oil revenues and the proposed IMF programme. Higher export receipts do not remove operating risk at producing assets, nor do they guarantee adequate domestic fuel and electricity supplies. Algeria's involvement here concerned technical assistance to an investigation and should be distinguished from wider bilateral defence discussions.

Satellite monitoring added a more specific assessment of the environmental exposure. Reporting on 16 October cited Copernicus observations showing methane emissions above forty tonnes an hour during satellite passes over Agadem. The observations concerned the same Goumeri W8 blowout, not a separate industrial incident. They indicated a substantial continuing gas release while the technical cause, full containment timetable and volume of spilled crude remained unresolved.



GABON

BW Energy reported positive appraisal results at Dussafu on 15 October and added a fifth producer to the drilling programme linked to the MaBoMo platform. The company estimated that the two Hibiscus appraisal results supported an additional eight to nine million barrels of gross recovery. That estimate described recoverable volumes associated with the appraisal, rather than oil already produced. MaBoMo Phase 2 was expected to begin production in the first quarter of 2027, following a delay from the earlier 2026 schedule. A separate Bourdon start was targeted for the first quarter of 2028. BW Energy also planned pump replacement at an existing well. The combination of new drilling and maintenance reflected the effort required to sustain offshore output; the value of the appraisal results will depend on connecting the wells and maintaining reliable processing capacity.

GHANA AND E. GUINEA

Ghana pursued additional gas capacity while seeking renewed upstream investment. Yinson and Eni agreed an amendment to the John Agyekum Kufuor FPSO arrangement valued at approximately \$810 million. The plan would increase Sankofa gas-processing and export capacity from about 210–220 million to 355 million standard cubic feet per day, with new compression and treatment modules expected in the first quarter of 2028.

The project responds partly to declining reservoir pressure and prospective domestic demand. Its export-capacity target does not guarantee delivered volumes without supporting transport and offtake arrangements. Separately, a Ghanaian investment official said discussions about ExxonMobil's possible return were taking place, but the company and relevant petroleum authorities had not publicly confirmed them.

In Equatorial Guinea, Chevron said first gas from the \$690 million Aseng development was expected in 2028, following a final investment decision earlier in the year. A development well and tie-back to existing infrastructure remained to be completed. The project addresses declining gas supply and LNG-feedstock concerns, but its expected output should remain a future milestone.

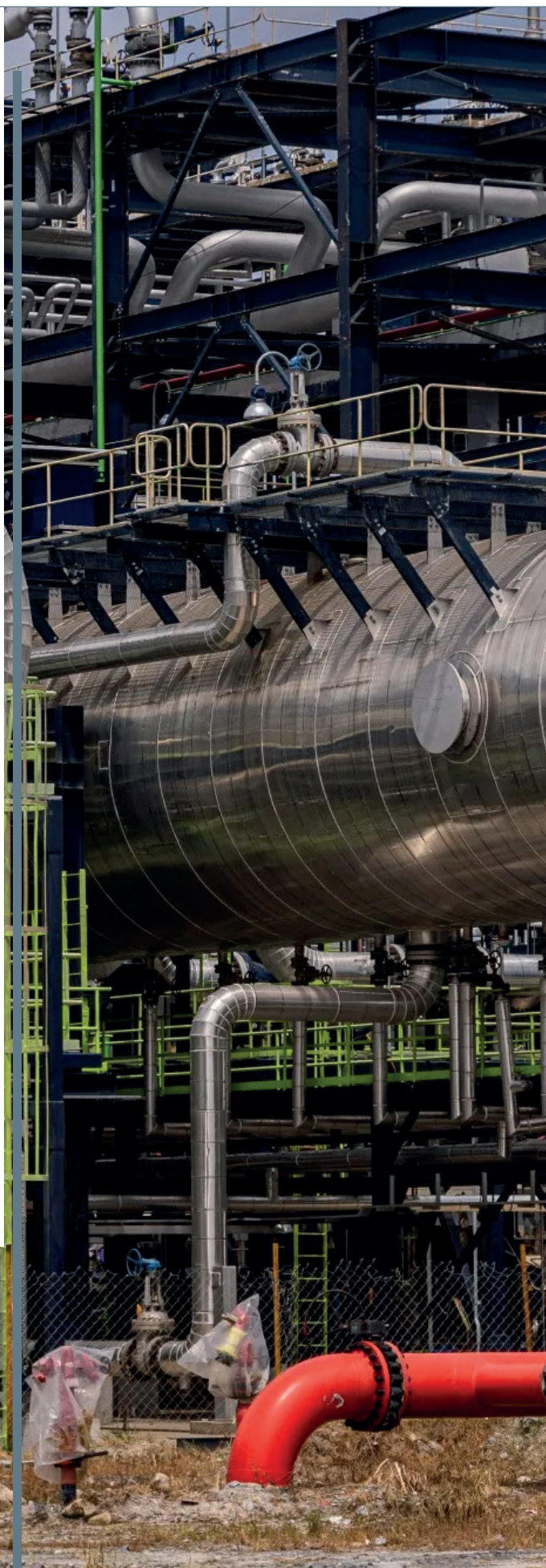
EGYPT AND SOUTH

Rosatom's storage division agreed with Teletech to assemble lithium-ion battery systems in Egypt, including technician training and a gradual build-up towards 500 MWh of annual manufacturing capacity. Neither an investment value nor a delivery timetable was disclosed. The project broadens Russia's energy role beyond the El-Dabaa nuclear development.

Egypt's stated goal of reaching 14,320 MWh of installed battery storage by the end of 2028 is a separate measure from annual factory output. Chinese-backed assembly and supply projects also compete in this market, making storage both a grid requirement and an industrial-policy opportunity.

In South Africa, Eskom's management described plans for new customers, renewables, exports and services as the electricity market opens. Its reported excess generation capacity and potential regional sales coexist with the need to adapt to a declining monopoly share. In Zimbabwe, Cabinet approved a proposed 600 MW floating-solar project at Kariba intended to complement hydropower and conserve water. Approval was an early milestone; financing and construction still determine whether the capacity will materialise. South Africa also sought a strategic partner for Eskom's proposed 1.5 GW Tubatse pumped-storage project. Bidding opened on 13 October, with planned storage of about 21 GWh. Secured land and environmental approvals were important preparatory steps, while capacity allocation, offtake and financing remained necessary. The proposal would support a system with more variable renewable generation but was not yet an operating storage asset.

A binding framework between Necsa and a Quantum Leap Energy subsidiary advanced plans for a uranium-enrichment venture at Pelindaba. Proposed ownership was approximately 80% for Quantum Leap Energy and 20% for Necsa, with TerraPower identified as a future fuel buyer under earlier arrangements. No commissioning date or project cost was provided. The partners still faced technology testing, financing and regulatory requirements, so the announcement did not establish commercial fuel production.



ILLUSTRATIVE ARCHIVE IMAGE

MINING

SUDAN

War continued to push Sudanese workers into hazardous artisanal gold extraction as other livelihoods and schooling deteriorated. An Ayin investigation described deep shafts, inadequate protective equipment and unstable ground. Sudanese Mineral Resources Company figures cited in the report put traditional-mining employment at about four million in 2025, compared with two million in 2021, and attributed roughly 83% of 2025 gold output to artisanal miners. These figures describe the sector's wider scale rather than a weekly increase. The economic pressure to continue working made formal closures and safety warnings difficult to enforce. The report linked collapses to weak supports, closely spaced shafts, rainwater and excavation without adequate geological assessment. Gold's role as a survival income therefore coexisted with severe occupational risks.

A separate dispute demonstrated the importance of local consent to industrial operations. Residents of Wadi al-Ashar in Red Sea State ended a sit-in at Russian company Alliance after government-mediated talks, according to the Minerals Ministry. The agreement addressed outstanding community entitlements, social-responsibility obligations, board representation, reinstatement of dismissed workers and priority for local hiring.

The ministry said operations could resume, but the agreement's practical value depends on implementation. Together, the artisanal and industrial cases show why production volume alone is an inadequate measure of mining governance: worker safety, local benefits and effective dispute resolution remain fundamental.

DRC

The DRC's mining debate increasingly concerned how export earnings circulate through its own economy. Central bank governor André Wameso outlined proposed foreign-exchange reforms at a Kolwezi conference on 9 October. He contrasted \$93.2 billion of total exports in 2023–25 with \$54.4 billion in declared repatriation and only \$3.8 billion of additional foreign-currency bank deposits. The comparison was the governor's policy argument; it does not by itself demonstrate that the difference was illicitly removed.

The proposal would strengthen repatriation deadlines and monitoring, expand use of Congolese francs in specified domestic transactions and tighten conditions around subcontracting and payments. These remained reform proposals, with implementation questions concerning corporate treasury management and international financing still under discussion. The central bank also described a monetary-gold diversification programme. Approximately 2.5 tonnes

had been acquired by the end of July towards a five-tonne target for December. This reserve policy was distinct from the broader effort to formalise artisanal sales. DRC Gold sought tax incentives to make official channels more commercially attractive to traders and cooperatives. Its argument was that buying offices and enforcement would be insufficient if the legal route remained uncompetitive. Civil-society debate also called for consistent mining taxation and protection of community-benefit provisions, although the workshop underlying that reporting took place in September.

The overall challenge is to increase domestic retention without assuming that new rules automatically deliver greater formalisation. Banking capacity, fiscal incentives, traceability and control over contested territories all affect whether the intended gains reach public finances and local businesses.

The Belgian investigation reported on 16 October added an external accountability dimension. Prosecutors confirmed searches following complaints concerning alleged money laundering linked to Congolese mining revenues. Reports named relatives and associates of President Félix Tshisekedi among those under investigation. The allegations had not been established in court. The case concerned the handling of resource income and the jurisdiction of investigators, while the presidency's response introduced a separate diplomatic dispute with Belgium.

ZAMBIA AND GUINEA

Prospect Resources reported new copper intersections and exploration targets at its Mumbezhi project in Zambia on 15 October. At Nyungu Central, drilling included ten metres grading 1.10% copper and 5.68 metres at 1.51%, while work at Shikezi identified two anomalies for further testing. Additional assays remained outstanding and exploration continued at other targets. These results support further resource work; they are not a new production announcement or proof of an economically viable mine.

In Guinea, Siguiri's ambition to reach 400,000 ounces a year by 2030 was reiterated after Mines Minister Bouna Sylla's visit. The mine produced 289,000 ounces in 2025. Expansion of mining areas and processing infrastructure underpin the target, which had also been discussed previously and should not be treated as a wholly new commitment. Guinea also sent sixty trainees to China for railway-related skills under the Simandou Academy framework. The initiative addressed a practical requirement of the mineral corridor: local personnel able to operate and maintain transport infrastructure. In both countries, geological resources remain only one part of the development chain. Electricity, logistics, operating skills and financing determine how quickly potential becomes durable output.

NIGERIA AND NIGER

Thor Explorations reduced its 2026 Segilola gold-production guidance to 70,000–72,000 ounces from 75,000–85,000, attributing the revision to heavy August rains and their operating effects. Nine-month production reached 54,924 ounces. The revision illustrated the exposure of production plans to local operating conditions even during a period of supportive gold prices.

In Niger, Mines Minister Abarchi Ousmane received an Infini Resources delegation led by Rohan Bone to discuss cooperation. The meeting was framed around resource sovereignty and strategic national interests. It did not itself establish a new licence, committed investment amount or construction schedule.

The two developments are at different points in the mining cycle: Nigeria's update concerned performance at an operating mine, whereas Niger's concerned potential partnerships. Keeping those stages distinct is necessary when assessing the economic value of a week's announcements.



GHANA & CÔTE D'IVOIRE

Galiano Gold secured extensions for the Abirem and Miradani mining leases at Asanko, running to 2041 and 2043 respectively. The leases cover producing and prospective areas, the processing facility and related infrastructure. The regulatory event supports mine planning, but the company's ambition to exceed 200,000 ounces annually from 2029 still depends on development work and future operating performance.

In Côte d'Ivoire, the government forecast 4,200 direct and indirect construction jobs at Aurum Resources' proposed Boundiali gold mine and about 2,200 during operations. The project envisages production beginning in 2028, subject to feasibility work, permits, financing and a final development decision. Estimated pre-production capital was \$342 million.

Both cases show the importance of distinguishing secured permissions from planned economic benefits. Ghana's lease extensions were completed decisions; Boundiali's employment and production figures remained projections. The proportion of projected employment reserved for local workers had not been specified in the reported announcement.

BURKINA FASO

Bomboré's operating results gave a more concrete measure of Burkina Faso's mining performance. Orezone reported production of 116,188 ounces in the first nine months of 2026, already exceeding the 110,014 ounces produced in all of 2025. Annual guidance remained 160,000–180,000 ounces. A hard-rock plant commissioned in late 2025 supported the increase. These were cumulative operating results reported during the week, rather than output generated in seven days. The results came amid a wider policy of increasing public participation. Mines Minister Yacouba Zabré Gouba reported about CFA2.5 trillion in direct mining revenue over 2022–25 and linked national resource control to mining-code changes and SOPAMIB. The figures were the government's reported performance measures, while additional processing and reserve-building remained objectives. At the project level, Panthera Resources announced a preliminary exploration target of 0.7–1.6 million ounces at Bido. The estimate required further work and was not a confirmed mineral resource. The state's 15% holding in Bomboré and revised royalties provide routes to public revenue, while actual dividends depend on mine profitability and distribution decisions. Exploration prospects and stronger public participation therefore require assessment alongside operating performance.

MALI

Reporting on 16 October indicated a gradual restart of exploration-permit processing after the restrictions introduced during Mali's mining reforms. The head of the Chamber of Mines said twenty-one exploration permits had been processed in August and September. The figure was a retrospective update presented during the reporting week, rather than twenty-one new awards made in seven days.

The reopening remained partial. Renewals and certain transitions from exploration towards exploitation had resumed, while the position of new awards and exploration-title transfers remained more constrained. Cora Gold's Sanankoro II renewal illustrated how title security can support progression towards a future operating licence without itself authorising construction of a mine. The practical test is whether administrative progress reverses declining exploration investment and produces technically and financially viable projects.

ZIMBABWE

Zimbabwe's mineral-export earnings were reported at \$4.7 billion, with lithium sales of \$2.16 billion over the first nine months. These cumulative figures reflected price movements and sector development and should not be presented as weekly receipts. The policy direction remained towards more domestic processing ahead of planned concentrate-export restrictions in January 2027.

Arcadia showed both progress and timing risk. Prospect Lithium Zimbabwe shifted its crude lithium-carbonate production target to the first quarter of 2027 from the previously reported end-2026 goal. It was investing \$40 million in a sulphuric-acid plant to secure a key input. Management said its lithium-sulphate operation was running at about 78% of stated design capacity, following the start of sulphate exports in April.

Crude carbonate is not the same as battery-grade material, and additional processing and quality requirements remain. The delay therefore matters to the sequencing of industrial policy: restrictions on raw-material exports and commissioning of processing facilities need to align if production and revenue are to continue smoothly.

In platinum-group metals, Tharisa's agreement with Valterra included a separate relationship to Zimbabwe's Karo development, which targets first ore to the mill in late 2027. The target remains dependent on development delivery rather than an existing source of production.

SOUTH AFRICA BOTSWANA & MOROCCO

South Africa's beneficiation ambitions remained closely tied to energy economics. Vedanta said its proposed \$1.5 billion Gamsberg smelter depended on commercially viable electricity tariffs; design work did not yet amount to a final investment decision. The project illustrates why greater domestic processing requires competitive inputs as well as mineral availability.

Valterra planned trial underground mining at Mogalakwena's Sandsloot project ahead of a possible 2027 investment decision. It also agreed to purchase half of Tharisa Mine's PGM concentrate from January 2027, while the companies explored fine-chrome recovery technology. Trial work, offtake certainty and commercial technology deployment are separate milestones.

Botswana explored a greater shareholding in De Beers as Anglo American pursued its exit. Reporting suggested a possible increase from 15% to about 25%, but negotiations and financing remained unresolved. A larger stake could expand influence while adding fiscal exposure during a weak diamond market. Separately, President Duma Boko's talks with China included mineral-processing cooperation; those commitments did not establish completed factories or financed projects.

Morocco's OCP announced plans to acquire its European partners' stakes in EMAPHOS, consolidating ownership of the existing purified phosphoric-acid operation. Completion was expected in early 2027, subject to approvals and conditions. The transaction concerned an established processing business rather than a new plant, reinforcing OCP's focus on higher-value applications while leaving execution of the ownership transfer outstanding.

NAMIBIA AND MINERAL LOGISTICS

African Pioneer announced a 7,000-metre drilling programme at Ongombo and Ongeama on 16 October, initially involving approximately 119 holes. The campaign sought to extend known copper mineralisation and provide information for mine design, with possible additional drilling dependent on results. A mining licence and environmental clearance did not remove the need for further technical and development work. No definitive construction or first-production date had been set.

In South Africa, Transnet Engineering signed a ten-year locomotive-support agreement with Wabtec on 15 October, valued at approximately \$400 million. The arrangement covered components, technical assistance and maintenance capability for existing Class 43D and 44D locomotives. It was a fleet-support contract rather than a purchase of a new fleet. For mineral exporters, its significance will depend on whether better availability and maintenance translate into more dependable freight services.



ILLUSTRATIVE ARCHIVE IMAGE

CONCLUSION

The week ended with military pressure and diplomatic engagement advancing together. In Sudan, new civilian-casualty allegations and disrupted services reinforced the urgency of a humanitarian truce, while Security Council disagreement complicated efforts to restrict weapons supplies. Congo's new opposition coalition, restrictions on political parties and dispute with Belgium widened the political consequences of the eastern conflict. In Ethiopia, control of major towns coexisted with continuing fighting and a dangerous border confrontation.

External relationships remained flexible. Sahel governments pursued Russian security cooperation alongside US commercial contacts, IMF negotiations and practical trade arrangements. Morocco's new government introduced a further domestic transition, while the Ebola emergency demonstrated the need for cross-border coordination and transparent use of external assistance. Diplomatic announcements will matter most where they produce enforceable agreements, protected access and reliable services.

Energy and mining developments increasingly concerned the systems needed to turn resources into durable income. Contractor finance in Nigeria, repairs and methane containment in Niger, storage and nuclear-fuel plans in South Africa, and mineral-processing targets in Guinea and Zimbabwe all faced distinct implementation requirements. The immediate tests are financing and commissioning, dependable transport, accountable management of revenues and benefits reaching workers and communities. Production targets and stronger public participation require those practical conditions to deliver lasting gains.



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