

STRATEGIC INTELLIGENCE DAILY

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Executive Assessment

Across Africa, governments are advancing energy infrastructure, tightening control over strategic minerals, and expanding industrial and logistics capacity. Gas pipeline development in Libya, lithium processing plans in Zimbabwe, gold refining capacity in the Democratic Republic of the Congo, and new exploration blocks in Angola and Namibia reflect a broader push to increase domestic value capture from natural resources while attracting external investment into energy and mining sectors.

At the same time, fiscal pressure, electricity costs, and institutional fragmentation continue to shape the operating environment. Electricity tariff increases in South Africa, financial restructuring pressures on Transnet, and industrial energy costs affecting Mozambique's aluminum sector illustrate structural constraints that could slow industrial expansion. The overall trajectory points to steady investment activity combined with rising regulatory assertiveness and infrastructure stress across several key economies.

FOCUS COUNTRIES AND SUBJECTS

Libya

The National Oil Corporation activated the first phase of the Faragh–Brega gas pipeline connection. Expanding domestic gas transport capacity is intended to reduce infrastructure bottlenecks and limit gas flaring in upstream production zones.

Zueitina and Sirte companies also launched the first operational phase of the Al-Farigh–Brega pipeline linking the Al-Farigh field to the Zueitina axis and integrating the network with the Sirte pipeline system through the 103A field. The project strengthens Libya's internal gas distribution architecture and supports electricity generation and industrial supply.

Libya Africa Investment Portfolio held talks in Tripoli with a Nigerien diplomatic delegation on the Transit Corridors initiative. Expanding logistics connectivity toward the Sahel would position Libya as a northern gateway for trans-Saharan trade routes while reinforcing economic integration with landlocked neighbors.

African Energy Chamber President NJ Ayuk stated that energy reforms and improving operating conditions are renewing investor interest in Libya's upstream sector. International companies are reassessing exploration and production opportunities as previously suspended fields and infrastructure gradually return to operation.

Political actors in Misrata called for an investigation into Arkenu Oil Company over alleged links to declining petroleum revenues and rising fiscal deficits. The controversy reflects persistent concerns about transparency in hydrocarbon revenue management and the broader impact of political fragmentation on economic governance.

Zimbabwe

Authorities announced plans to commission four lithium sulfate processing plants before the end of the year. Restricting raw lithium exports is intended to shift the country toward domestic mineral processing and increase participation in global battery supply chains.

The government also revoked RioZim's operating license for the Sengwa coal project after delays in the planned 2,800 MW power station. Enforcement of the "use it or lose it" policy signals a stricter approach to strategic mining concessions and energy infrastructure commitments.

Egypt

The government granted golden licenses to eight investment projects worth approximately \$1.2 billion across energy, logistics, transport, and manufacturing sectors. Accelerated licensing procedures are designed to attract capital while supporting industrial expansion and infrastructure development.

GameChange Solar and Hassan Allam Constructions signed an agreement to supply solar tracking systems for a 258 MWp solar facility under the Benban solar complex. Additional renewable capacity strengthens Egypt's strategy of diversifying electricity generation and reducing reliance on natural gas.

Fitch Solutions projected that Egypt's construction sector could expand at an average annual rate of roughly 6.3 percent between 2026 and 2035. Mega-projects in the New Administrative Capital and North Coast developments are expected to sustain infrastructure demand over the coming decade.

Kenya

Estimates indicate that the Lamu Basin offshore Kenya and Somalia may contain hydrocarbon resources valued between \$200 billion and \$500 billion. Although exploration remains limited, the basin's potential continues to attract strategic attention from international energy companies.

Foreign Minister Musalia Mudavadi announced after meetings in Moscow that Kenyan nationals will no longer be recruited into the Russian military for operations in Ukraine. The agreement reduces diplomatic exposure related to the conflict while reinforcing Nairobi's neutral foreign policy posture.

President William Ruto withdrew plans for full privatization of the Kenya Ports Authority following concerns from Uganda and Rwanda regarding trade costs. The revised plan maintains state control while allowing private operators to manage selected berths in Mombasa and Lamu, reflecting a balance between regional logistics integration and domestic political sensitivity.

Angola

ExxonMobil and TotalEnergies signed agreements to obtain four exploration blocks in the offshore Benguela and Namibe basins. Expanding frontier exploration signals continued international confidence in Angola's deepwater hydrocarbon potential.

Copia Group announced participation as a platinum sponsor at the Angola Oil & Gas 2026 conference while positioning itself to provide engineering and technical services for energy infrastructure projects. The company's engagement reflects growing service-sector competition around Angola's upstream expansion.

The Angolan Navy introduced Anavia HT-100 unmanned aerial systems to strengthen coastal surveillance and protect offshore energy infrastructure. Improved maritime monitoring supports security for offshore production zones and shipping routes.

Mozambique

India-based JSW Steel launched strategic coking coal mining operations in the Moatize basin. Securing long-term metallurgical coal supply is critical for steel production while reinforcing Mozambique's role as a key supplier to global industrial markets.

The government is negotiating with South32 and other investors to prevent the closure of the Mozal aluminum smelter, which suspended operations due to high electricity costs. Maintaining operations at the facility remains essential for Mozambique's industrial output and export revenues.

South Africa

Sanitech invited mining companies to participate in field trials of a new sanitation prototype designed for underground operations. Waste treatment directly at the point of use could improve environmental management in large mining complexes.

Energy regulator Nersa approved electricity tariff increases of 8.76 percent for standard consumers and 9 percent for municipalities supplied by Eskom. The adjustment aims to recover around 54 billion rand linked to earlier calculation errors, reflecting continuing financial pressure in the national power utility.

State logistics operator Transnet is negotiating with creditors to ease loan conditions while refinancing more than \$200 million in debt. Total liabilities approaching \$2.6 billion highlight ongoing financial stress in South Africa's transport infrastructure system.

Analysts warned that disruptions in global supply chains linked to conflict in the Middle East could affect fuel availability in South Africa. The country's dependence on imported refined fuels leaves domestic supply exposed to maritime transport shocks.

Southern Africa – Botswana | Namibia

Botswana Minerals obtained eight exploration licenses covering approximately 7,000 square kilometers in northwestern Botswana. The company intends to apply artificial intelligence-based exploration techniques to identify copper and other critical mineral deposits.

Tower Resources reported progress in regulatory approval for a farm-out agreement with Prime Global Energies covering the offshore PEL96 block in Namibia. Completion of the deal would accelerate exploration activity in one of southern Africa's emerging frontier basins.

Sahel – Mali | Niger

Mali's Justice Minister Mamoudou Kassogu  met Japan's ambassador in Bamako to discuss cooperation on judicial reform and rule-of-law programs. Technical assistance from Japan reflects ongoing international efforts to strengthen institutional capacity in the country.

Prime Minister Abdoulaye Ma ga also held talks with the United Nations Humanitarian Coordinator regarding cooperation under the SNEDD 2024–2033 development strategy focusing on health, education, and food security.

Niger and Libya Africa Investment Portfolio discussed logistics cooperation under the Transit Corridors project. Improved transport connections between Libya and Niger could strengthen trans-Saharan trade flows linking the Sahel with Mediterranean markets.

Nigeria

Oil-producing communities in Polobubo in Delta State called for protests after claiming exclusion from infrastructure projects worth roughly 400 billion naira. Distribution disputes around oil revenues remain a recurring source of tension in producing regions.

The government launched a \$750 million program to deploy 1,350 solar mini-grids across the country. The initiative is expected to mobilize approximately \$1.1 billion in private investment to expand decentralized electricity supply.

Nigeria also signaled readiness to increase electricity exports to Togo beyond the current level of roughly 75 MWh. Expanding cross-border electricity trade reflects growing demand within the West African Power Pool.

President Bola Tinubu will travel to London for a state visit hosted by King Charles III. Discussions are expected to address trade cooperation, defense relations, and infrastructure investment including port modernization.

Africa – General

Exploration activity for gold and critical minerals is accelerating across several African jurisdictions. MetalsGrove Mining and Stellar AfricaGold launched LiDAR-based geological surveys and geochemical programs at the Zuénoula gold project in Côte d'Ivoire, while Burundi signed a three-year agreement with KoBold Metals and Life Zone Metals to explore strategic mineral deposits. Ghana's Minerals Income Investment Fund simultaneously reported record royalty revenues of \$499 million in 2025, illustrating how high gold prices and expanded production are strengthening fiscal returns from the mining sector. These developments indicate a broader continental push to expand resource exploration while improving state capture of mineral revenues.

Energy infrastructure and climate-aligned investment programs are also expanding across the continent. AIC Renewable Energy began feasibility studies to expand the solar power facility at Freetown Airport in Sierra Leone, while Mirova provided a \$15 million loan to ISAT Africa to deploy solar-powered telecommunications towers in off-grid regions across sub-Saharan Africa. The transition away from diesel-dependent infrastructure toward hybrid renewable systems reflects a growing convergence between digital connectivity expansion and decentralized energy generation.

Structural adjustments in downstream energy markets are emerging alongside these investment trends. Following TotalEnergies' withdrawal from Burkina Faso, approximately 170 fuel stations and distribution assets are expected to be transferred to domestic investors. The reallocation of these assets highlights how geopolitical realignments and corporate portfolio shifts are reshaping national fuel distribution networks.

External geopolitical engagement with African economies continues to intensify. French President Emmanuel Macron launched the Africa France Impact Coalition to deepen partnerships between African and French investors, while Rwanda and Ethiopia formalized a defense cooperation agreement focused on military training and institutional coordination. Expanding economic diplomacy and security cooperation suggests that external actors increasingly view Africa as both a strategic investment frontier and a geopolitical partnership arena.

Region	Key Sectors	Major Developments	Strategic Impact	Risk
North Africa	Gas, energy, infrastructure	Libya expands gas pipelines. Egypt accelerates energy licensing and solar capacity.	Energy supply and industrial power capacity increase.	Moderate
East Africa & Horn	Hydrocarbons, minerals, logistics	Lamu Basin hydrocarbon potential gains attention. New mineral exploration and defense cooperation expand.	Strategic importance of regional resources grows.	Moderate
Southern Africa	Minerals, power, industry	Lithium processing expands in Zimbabwe. Copper exploration rises in Botswana. Offshore exploration advances in Namibia.	Resource industrialization increases but power constraints remain.	Moderate–High
West Africa	Energy transition, mining	Solar mini-grids expand in Nigeria. Gold exploration rises across several states.	Decentralized power and mining investment increase.	Moderate
Sahel Corridor	Logistics, governance	Libya–Niger corridor discussions advance. Institutional cooperation continues in Mali and Niger.	Trans-Saharan trade routes gain strategic relevance.	Moderate–High

Forward Outlook

In the coming week, attention will focus on whether ongoing energy and resource initiatives translate into sustained economic momentum. Gas infrastructure expansion in Libya, frontier exploration activity in Angola and Namibia, and licensing programs in Egypt indicate continued interest in African hydrocarbons despite governance and security constraints in several producing regions. At the same time, policy shifts in the mineral sector, particularly Zimbabwe’s move toward lithium processing and new copper and gold exploration programs across southern and western Africa, reflect a broader effort by governments to increase domestic value capture from strategic resources and reduce dependence on raw commodity exports.

Energy security and infrastructure financing will remain critical variables shaping the short term outlook. Electricity tariff adjustments in South Africa, negotiations to prevent the closure of Mozambique’s Mozal aluminum smelter, and Nigeria’s expansion of solar mini grids highlight the pressure to stabilize power supply while supporting industrial production. External engagement is also expected to intensify as foreign governments and investment groups expand economic and security partnerships across the continent, indicating that Africa’s energy systems, mineral supply chains, and logistics corridors will continue to attract strategic international interest.

FORWARD LOOK FOR 7 DAYS:

- Libya – Gas infrastructure integration and upstream investment signals
- Zimbabwe – Lithium processing rollout and mineral export policy enforcement
- South Africa – Eskom tariff impact and Transnet debt negotiations
- Mozambique – Outcome of Mozal aluminum smelter negotiations
- Nigeria – Implementation of solar mini-grid program