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Executive Assessment

Across Africa, political coordination, energy expansion, and resource development are increasingly unfolding in parallel rather than in isolation. Diplomatic engagement around Libya's political roadmap shows continued international alignment on stabilization, while new gas discoveries and ongoing supply management efforts highlight the country's dual reality of growing energy potential alongside persistent operational fragility. A similar pattern is visible across major producers, where Angola's expanding LNG-linked gas output and Egypt's large-scale renewable and industrial investments indicate a broader shift toward integrated energy systems that combine upstream growth with downstream and infrastructure capacity.

At the same time, competition over critical minerals and strategic resources is intensifying across multiple regions. New rare earth discoveries in Botswana, nickel development in Burundi, and accelerated exploration in Zambia reflect the growing importance of emerging suppliers in global supply chains. Governments are increasingly positioning these resources within long-term industrial and export strategies, while external partnerships and financing frameworks continue to shape project execution. This dynamic suggests that control over resource flows is becoming as important as production itself.

Structural constraints and execution risks remain a defining feature of the operating environment. Energy supply limitations in Southern Africa, governance disruptions affecting regional power integration in East Africa, and ongoing security pressures in parts of the Sahel continue to influence project timelines and investment confidence. At the same time, financing gaps and bankability challenges across the energy sector indicate that capital availability alone is not sufficient without institutional capacity and regulatory clarity.

The overall trajectory points to a continent where growth opportunities are expanding across energy, mining, and infrastructure, but where outcomes will increasingly depend on the alignment between policy direction, operational stability, and the ability to convert investment commitments into functioning assets.

FOCUS COUNTRIES AND SUBJECTS

Libya

Presidential Council Chairman Mohamed Menfi held talks with the Berlin Process Group and international actors to advance Libya's political process. Parallel engagements by UN Special Representative Hanna Tetteh with German and Chinese diplomats reinforce coordinated international pressure to implement the UN roadmap and accelerate institutional unification and election preparation.

In the energy sector, Eni announced new gas discoveries exceeding 1 trillion cubic feet near the Bahr Essalam field, with rapid tie-in to existing infrastructure planned. At the same time, the National Oil Corporation is maintaining fuel supply stability despite weather-related disruptions, while a fire on the Sharara export pipeline temporarily halted shipments and forced rerouting. Together, these developments highlight a dual dynamic of expanding gas capacity alongside continued operational fragility in oil infrastructure.

Egypt

Egypt signed agreements for 5,620 MW of wind, solar, and storage projects, supporting its target of exceeding 42 percent renewable share by 2030. This expansion is complemented by a $193 million bioethanol project in Damietta, which is nearing financial close and aims to strengthen downstream industrial capacity.

Petrojet's expansion into nuclear and large-scale infrastructure projects, supported by a project portfolio valued at 246 billion Egyptian pounds through 2029, reflects a broader push to position Egypt as a regional engineering and energy hub. The combination of renewable expansion, petrochemical investment, and engineering capacity growth indicates an integrated strategy linking energy transition with industrial development.

Angola

Botswana's president visited Angola to deepen cooperation in mining, energy, and diamonds, signaling growing regional alignment around resource development. At the same time, Sonadrill extended offshore drilling operations through 2028, supported by $1.75 billion in financing, reinforcing long-term upstream activity.

Gas production at the Quiluma field has begun, with supply expected to reach up to 330 million cubic feet per day for LNG exports. This is reinforced by Azule Energy's phased capacity expansion and the launch of Angola's first independent gas production stream.

Energean's acquisition of Chevron's offshore assets marks a new market entry, while sustained drilling and LNG-linked projects indicate a broader shift toward gas-driven export growth. Taken together, investment inflows, production expansion, and asset transfers point to a consolidation phase in Angola's energy sector with increasing global integration.

South Africa

Former Eskom CEO André de Ruyter warned that without new power plants, electricity shortages could return after 2029 despite ongoing renewable investments. This highlights long-term structural risks in the energy system.

At the same time, mining output increased by 4.6 percent year-on-year in January 2026, showing resilience supported by high commodity prices despite pressure in coal and iron ore segments. Infrastructure development also continues, with Bram Fischer Airport being repositioned as a logistics and investment hub through a new public partnership.

These developments indicate a mixed trajectory where industrial resilience and infrastructure expansion coexist with persistent long-term energy constraints.

Kenya

Kenya launched PPP tenders for major energy projects including two hydro plants and a 1.2 GW gas facility, aiming to close supply gaps and meet rising electricity demand. This aligns with broader efforts to diversify the energy mix.

However, the World Bank's 21-month ban on PwC entities over misconduct in the Ethiopia–Kenya power project introduces uncertainty into regional electricity integration plans. Together, expansion efforts and governance disruptions highlight both the ambition and fragility of East Africa's energy integration strategy.

Ethiopia

Ethiopia signed a 25-year, $4.2 billion gas supply agreement between Golden Concord and Dangote Group, supporting long-term industrial production. In parallel, discussions with Italy under the Mattei Plan are advancing financing for the Koysha Hydropower Project and Bishoftu Airport.

These developments indicate a coordinated approach linking energy supply, infrastructure development, and external financing to sustain industrial growth and regional integration.

Botswana | Mozambique | Zambia

Botswana's discovery of a deposit containing all 15 critical rare earth elements identified by the United States significantly increases its strategic relevance in global supply chains.

Mozambique's gas pipeline operated by Rompco continues to play a critical role in supplying South Africa, positioning Mozambican gas as a key transition fuel in the region's energy mix.

In Zambia, KoBold Metals is expanding AI-driven exploration for copper and critical minerals, with production at the Mingomba project targeted for the early 2030s. Across the region, resource discovery, energy interdependence, and technology-driven exploration are reinforcing Southern Africa's role in future supply chains.

Nigeria | Cameroon | Ghana

Nigeria and Sweden agreed to deepen cooperation in trade, innovation, and digital transformation, with Sweden opening a trade office in Lagos. The move reflects growing international interest in Nigeria's non-oil sectors.

Cameroon introduced a 12-month customs exemption on renewable energy and water equipment to expand access in rural areas. The policy supports infrastructure development in underserved regions.

In Ghana, competition over the reopening of the Damang gold mine coincides with new regulations to increase local participation, while agreements with Kyrgyzstan expand cooperation in the gold sector. Together, these developments reflect a regional shift toward diversification, local value capture, and sectoral modernization.

Africa – General

Burundi's agreements with KoBold Metals and Lifezone Metals aim to accelerate nickel development and position the country as a long-term supplier through the Musongati project. This aligns with broader trends of expanding critical mineral production across emerging jurisdictions.

At the continental level, a $100 billion investment agenda focused on women and youth was endorsed during the African Union Summit, highlighting efforts to broaden inclusive growth frameworks. In parallel, the Africa France Impact Coalition under new leadership aims to deepen private sector engagement and reshape external economic partnerships.

At the same time, structural challenges persist. Despite more than $13 billion in potential energy investments, limited project bankability continues to constrain execution. The emergence of new political and technical actors across Namibia, Algeria, and Madagascar reflects a shifting leadership landscape, while financing gaps remain a key bottleneck for large-scale project delivery.

Forward Outlook

Attention will shift toward how quickly recent energy and infrastructure commitments translate into operational output. In Libya, progress will depend on whether new gas discoveries are integrated into existing systems without disruption from infrastructure incidents. Angola's trajectory will be measured by the pace of LNG-linked gas scaling and asset consolidation, while Egypt's ability to move from agreements to execution in renewables and downstream projects will signal the depth of its industrial expansion strategy.

At the same time, resource competition and financing conditions will shape near-term dynamics. Developments in Botswana, Burundi, and Zambia will indicate whether emerging mineral producers can accelerate project timelines and secure stable investment flows. In East Africa, the impact of governance disruptions on regional power integration will remain critical, while across Southern Africa, electricity constraints will continue to influence industrial performance. The balance between project execution, regulatory consistency, and infrastructure stability will remain the primary determinant of short-term investment viability.

Strategic Implications

- Energy systems are shifting toward gas and hybrid models, increasing the importance of infrastructure reliability alongside resource availability
- Critical minerals are moving from commodity status to strategic assets, with governments prioritizing control over supply chains
- Regional integration efforts remain vulnerable to governance and execution risks, particularly in power and logistics corridors
- Investment outcomes are becoming increasingly dependent on state capacity rather than resource endowment