STRATEGIC INTELLIGENCE DAILY

Region: Africa

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Executive Assessment

Across Africa, the current trajectory reflects a transition from expansion-driven growth to coordination-driven systems management. Governments are no longer only scaling energy, mining, and infrastructure capacity but are increasingly focused on how these systems interact, who controls them, and how value is retained within national frameworks. This is producing a more structured policy environment in which licensing decisions, partnership models, and infrastructure planning are being aligned with long-term state objectives rather than short-term capital inflows.

At the same time, cross-border integration is gaining strategic importance as countries seek to link production zones with transport corridors and external markets. Developments such as the Lobito Corridor, regional power projects, and gas export negotiations indicate a shift toward interconnected economic architecture rather than isolated national projects. This integration, however, is unfolding alongside a more selective approach to external engagement, where governments are calibrating partnerships based on financing terms, political alignment, and technological contribution. The result is an operating environment defined by expanding project pipelines, but also by increasing complexity in execution, coordination, and stakeholder alignment.

FOCUS COUNTRIES AND SUBJECTS

Libya:

The government initiated negotiations with new contractors to replace Petrofac in an upstream oil project, indicating a restructuring phase in operational control over strategic hydrocarbon assets. The transition reflects efforts to rebalance control within the energy sector while maintaining production continuity.

Libya and China agreed to expand cooperation in infrastructure and energy, strengthening Libya’s access to financing and technical capacity. The framework positions China as a central actor in reconstruction and reinforces long-term infrastructure development.

The government launched infrastructure and governance projects in Sirte to position the city as an economic hub. The initiative supports territorial economic integration while aiming to attract investment and generate employment.

Egypt:

The government raised concerns over Ethiopia's plans to build three new dams on the Blue Nile, increasing pressure on downstream water security. The development adds geopolitical tension to resource management dynamics and reinforces Egypt's strategic focus on water diplomacy.

Egypt signed renewable energy and storage agreements totaling 5.6 GW, accelerating diversification of the energy mix. The projects expand generation capacity while strengthening long-term energy security.

An Engie-led consortium signed a 25-year power purchase agreement for a 900 MW wind project in Ras Shokeir. The agreement enhances renewable capacity and contributes to supply stability within the national grid.

ARCIUS Energy and bp initiated offshore gas drilling in the Mediterranean as part of an $11.7 billion investment plan. The program is designed to increase hydrocarbon output and reinforce Egypt's position as a regional gas hub.

The government accelerated efficiency upgrades at the Beni Suef power plant to address peak summer demand. The modernization improves system reliability and reduces operational strain on the grid.

Algeria:

The government is preparing high-level engagement with Italy to deepen energy cooperation and reinforce export alignment toward Europe. The process strengthens Algeria's role as a strategic gas supplier within the European energy architecture.

Algeria and Niger advanced trade and industrial cooperation talks, expanding regional economic integration. The engagement supports cross-border value chains and strengthens bilateral economic coordination.

Authorities approved a $5.4 billion Illizi South hydrocarbon project with Sonatrach and Midad Energy, targeting increased production capacity. The project supports export volumes and reinforces upstream investment momentum.

Algeria and Niger launched construction of a 40 MW gas power plant in Niamey to improve electricity supply. The project enhances regional energy connectivity and supports infrastructure development.

Construction began on a zinc and lead mining project in Oued Amizour, expanding Algeria's mining sector footprint. The initiative contributes to resource diversification and industrial development.

Nigeria:

The government signed a cybersecurity agreement with Finland to strengthen digital infrastructure resilience. The partnership supports technological capacity building and addresses rising cyber threats.

Nigeria intensified negotiations on a $20 billion gas pipeline project targeting European markets with a projected capacity of 30 bcm. The initiative aims to increase export revenues while strengthening strategic energy positioning.

The Ikom hydropower project was relaunched under a PPP model with a targeted capacity of 400 to 730 MW. The project supports diversification of energy sources and expansion of generation capacity.

The Nigerian Mining Finance Corporation announced plans to expand financing access to unlock an estimated $700 billion mineral potential. The initiative strengthens domestic value chains and supports mining sector growth.

South Africa:

The government is accelerating energy market reforms to increase competition and private sector participation. The policy direction aims to improve efficiency and attract long-term investment.

Transnet signed a 25-year agreement with FFS Tank Terminals for a liquid bulk terminal in Cape Town. The project strengthens logistics infrastructure and expands downstream capacity.

Authorities called for increased domestic oil and gas production to reduce import dependence. The approach supports energy security while encouraging upstream investment.

The 105 GW energy capacity plan was updated, reflecting ongoing policy adjustments. Continued revisions indicate strategic recalibration within the energy sector.

Senegal:

President Bassirou Diomaye Faye held talks in Spain to expand trade and investment cooperation. The engagement strengthens bilateral economic ties and supports external investment flows.

The government is negotiating with France to redefine defense cooperation following military base transfers. The process reshapes the security framework while maintaining operational coordination.

Prime Minister Ousmane Sonko continues efforts to renegotiate oil and gas contracts, facing resistance from international companies. The situation introduces uncertainty into the investment environment and contract stability.

Democratic Republic of the Congo | Angola:

The Democratic Republic of the Congo and Angola completed the first copper shipment via the Lobito Corridor to Europe, strengthening export logistics capacity. The corridor enhances regional integration and reduces transport bottlenecks.

Rome Resources announced a high-grade tin discovery at the Kalayi site in the Democratic Republic of the Congo, indicating increased reserve potential. The finding supports future mining expansion and investor interest.

Corcel secured £3.6 million in financing for exploration activities in Angola's KON 16 block. The funding accelerates upstream development and supports drilling operations.

Zimbabwe | Côte d'Ivoire | Ghana:

Wildsky Resources signed an agreement including an acquisition option for a gold asset in Zimbabwe, expanding mining investment activity. The move reflects sustained interest in the country's resource sector.

MetalsGrove expanded exploration activities at the Central West gold project in Côte d'Ivoire, targeting increased resource potential. The initiative supports project scaling and future production capacity.

Ghana announced plans to develop a 200 MW battery energy storage system to improve grid stability. The project supports renewable integration and enhances energy reliability.

Niger | Burkina Faso:

Niger and Burkina Faso launched a joint customs coordination mechanism to strengthen trade security. The framework reduces smuggling risks while improving border control efficiency.

Niger and Algeria advanced a 40 MW gas power project to increase electricity supply. The initiative supports regional integration and infrastructure development.

Burkina Faso is implementing the joint customs mechanism to improve transit trade flows. The process enhances logistical efficiency and strengthens border governance.

Kenya | Tanzania:

Kenya is deepening trade relations with China to address a trade deficit exceeding 500 billion shillings. The strategy focuses on expanding value-added exports and production partnerships.

Tanzania presented a $12.9 billion energy investment plan to international investors, targeting infrastructure expansion. The plan supports capacity growth and long-term energy supply improvements.

Namibia | Djibouti:

Namibia rejected Starlink's license application due to local ownership requirements, signaling a stricter regulatory approach. The decision reflects increasing control over digital infrastructure investments.

Djibouti announced plans to attract $50 million in mining investment to support diversification. The initiative strengthens industrial development and resource sector expansion.

Mozambique:

Ukraine and Mozambique agreed to expand cooperation in energy supply, digital infrastructure, and food security. The partnership reflects Mozambique's growing role in strategic external engagement.

A parallel agreement between Ukraine and Mozambique focuses on strengthening energy supply and food security coordination. The framework deepens bilateral cooperation across critical sectors.

Forward Outlook

In the near term, attention will center on implementation capacity rather than project announcements, as multiple countries move from agreement phase to execution across energy, mining, and infrastructure sectors. Delays linked to financing structures, contractor transitions, and regulatory approvals may begin to differentiate projects that advance from those that remain politically driven but operationally constrained. This creates a short-term environment where timelines, rather than intent, become the primary indicator of momentum.

At the same time, cross-border initiatives and corridor-based projects are expected to gain greater operational visibility, particularly where logistics, energy transmission, and export routes intersect. Coordination between states will be tested by administrative alignment, security conditions, and financing continuity, especially in regions where multiple actors are involved. The coming days are therefore likely to highlight which regional integrations are structurally viable and which remain exposed to fragmentation risks.

Region	Energy	Mining	Infrastructure
North Africa	Very High	Medium	Medium
West Africa	High	Medium	Low
Central Africa	Medium	Very High	High
East Africa	High	Low	High
Southern Africa	High	Low	Medium

Strategic Implications

- North and West Africa – Project execution capacity is becoming the key determinant of whether large-scale energy and infrastructure investments move beyond agreement phase into operational output
- North Africa – State-led coordination is reshaping partnership models, particularly in Libya, Egypt, and Algeria, where regulatory alignment and political approval are central to project viability
- Central and Southern Africa – Corridor-based development is gaining strategic weight, with initiatives such as the Lobito Corridor linking mining production zones to global export markets

- East Africa – External engagement is becoming more selective, with countries like Kenya and Tanzania conditioning partnerships on trade balance improvement, financing terms, and industrial participation
- Sahel and West Africa – Operational risk is increasingly tied to multi-actor coordination, where security conditions, institutional capacity, and cross-border governance affect project continuity