STRATEGIC INTELLIGENCE DAILY

Region: Africa

Date: 1 April 2026

Scope: Security | Energy | Politics | Diplomacy | Investment

Classification: Client Confidential

Executive Assessment

Economic activity across Africa is shifting toward integrated growth models that combine energy, infrastructure, and industrial investment. South Africa's expansion in renewables, data, and manufacturing, alongside Nigeria's combined power and digital projects and Egypt's upstream push, shows a move away from single-sector dependence toward more connected economic systems.

External partnerships are also becoming more diverse and strategically managed. Countries are engaging with China, Russia, Japan, Gulf actors, and Türkiye across different sectors at the same time. This creates more flexibility in attracting capital and technology, but it also increases the need for coordination and policy consistency.

At the same time, institutional gaps remain a key constraint. Libya's fragmented governance, security-linked risks in the Great Lakes region, and transparency concerns in Somalia highlight uneven operating conditions. Investment momentum is growing, but its long-term impact will depend on how effectively states manage regulation, oversight, and alignment between external financing and domestic priorities.

FOCUS COUNTRIES AND SUBJECTS

Libya

Libya and Egypt held talks to regulate the legal status of Egyptian workers, aiming to formalize labor markets and improve workforce management. Strengthening labor governance supports economic normalization and cross-border integration.

Türkiye decided to open a new consulate in Benghazi, expanding its diplomatic presence. The move reinforces Türkiye's political and economic positioning in eastern Libya.

Religious authority Sadiq al-Ghariani issued a fatwa allowing different pricing between cash and electronic payments. The ruling introduces uncertainty into commercial transactions and pricing practices, potentially affecting market consistency.

South Africa

LONGi signed new solar agreements reaching 1.3 GW capacity, while South Africa and Japan expanded cooperation in trade, energy, and carbon neutrality. These developments align external financing and technology with domestic energy transition priorities.

Uber announced a $265 million investment in electric vehicles and charging infrastructure, while Equinix committed $438 million to expand data centers and Coca-Cola outlined a $1

billion expansion plan. The convergence of mobility, digital, and consumer investments reflects broad-based market scaling.

West Wits Mining brought a new underground gold project into production and Jinko Solar expanded renewable technologies, while fuel shortages and price pressures exposed continued import dependence. The environment combines energy transition momentum with structural vulnerability.

Egypt

Egypt and Uganda agreed to expand political and economic cooperation, strengthening trade and infrastructure linkages. Expanding regional ties supports connectivity and cross-border project alignment.

SOCAR and the Egyptian General Petroleum Corporation signed an agreement to expand oil and gas cooperation. The partnership reinforces upstream activity and Egypt's positioning as a regional energy platform.

Nigeria

Huawei and Tetracore Energy launched a $400 million data center and integrated power project. Combining digital infrastructure with energy generation reflects a model of self-sustaining industrial systems.

Angola
Oando acquired a 45% stake and operatorship in Block KON-13, marking its first international upstream expansion. The move strengthens production outlook and regional corporate positioning.

DRC – Burundi – Rwanda

The DRC and China agreed to expand duty-free exports of critical minerals while increasing Chinese investment. The arrangement deepens integration into global supply chains.

TotalEnergies is advancing the Ruzizi III hydropower project across Burundi, DRC, and Rwanda. Progress remains dependent on security coordination and cross-border governance alignment.

Ethiopia – Kenya – Uganda

Ethiopia is advancing financing talks with China and AIIB for the Bishoftu International Airport while deepening nuclear cooperation with Russia. These initiatives support long-term infrastructure and energy system expansion.

Kenya and UAE-based AriseIIP aim to attract over $3 billion in industrial and textile investment. Strengthening manufacturing capacity reflects a shift toward value-added production.

Uganda and Kenya agreed to resolve the Migingo Island dispute through diplomatic channels. Managing territorial issues supports regional stability and cross-border coordination.

Ghana – Mali – Guinea-Bissau – Senegal

Ghana secured a $35 million fund to channel pension capital into SMEs, while Mali is advancing a 50 MW solar project with Chinese support despite infrastructure constraints. These efforts support gradual industrial and energy capacity expansion.

Leaders from Guinea-Bissau and Senegal engaged with EU officials to reposition regional political and economic relations. External engagement continues to shape West Africa's diplomatic alignment.

Namibia – Botswana

JOGMEC increased financing for Namibia's Lofdal rare earth project, strengthening its role in critical mineral supply chains.

The OPEC Fund committed $250 million to Botswana and other African states to support infrastructure, agriculture, and mining. Financing flows highlight multi-sector development priorities.

Africa – General

Morocco advanced the 305 MW Noor Atlas solar program through new agreements, expanding renewable capacity and supporting energy access across remote regions. The development reflects continued scaling of clean energy infrastructure as part of broader electrification strategies.

The arrival of a drilling vessel at the Curad-1 field marks a new phase in Somalia's oil exploration, while governance and transparency concerns remain central to long-term project viability. The situation highlights the importance of institutional oversight in emerging hydrocarbon markets.

The IMF approved a $216 million program for Papua New Guinea to address balance of payments pressures and stabilize the economy. The intervention reflects broader challenges in managing growth slowdown and inflation under external financing constraints.

Cross-Regional Strategic Trends

- **Labor Mobility and Market Formalization**

  Cross-border workforce regulation is gaining importance as countries seek to stabilize labor markets and reduce informality. Engagements such as Libya–Egypt coordination indicate that labor governance is becoming a structural component of economic normalization and productivity management.

- **Diplomatic Expansion as Economic Strategy**

  States are increasingly using diplomatic presence to support commercial access and influence. Türkiye's move in eastern Libya and broader diplomatic engagements across regions show that political positioning is being used to unlock trade, investment, and local partnerships.

- **Multi-Sector Investment Clustering**

Investment is concentrating simultaneously in mobility, digital infrastructure, consumer markets, and energy systems. South Africa illustrates this pattern, where transport electrification, data centers, and industrial expansion are advancing together, creating diversified growth clusters rather than single-sector dependency.

- **Financial Structuring and Domestic Capital Mobilization**

  There is a growing effort to channel local financial resources into productive sectors. Ghana's SME-focused fund and broader financing initiatives across regions reflect attempts to deepen domestic capital markets and reduce reliance on external funding.

- **Strategic Control of Critical Resources**

  Countries are strengthening their position within global supply chains through targeted investments in minerals and energy. Namibia's rare earth financing and DRC's export arrangements highlight a focus on securing long-term relevance in critical resource markets.

- **Infrastructure–Security Interdependence**

  Large-scale infrastructure and energy projects are increasingly tied to security coordination and political stability. Cross-border hydropower initiatives and emerging extraction zones show that project viability depends on the ability to manage territorial control and operational safety alongside technical delivery.