AFRICA BULLETIN

Africa in Turmoil Regional Flashpoints Great Power Moves





Issue: 10 21 Nov - 05 Dec

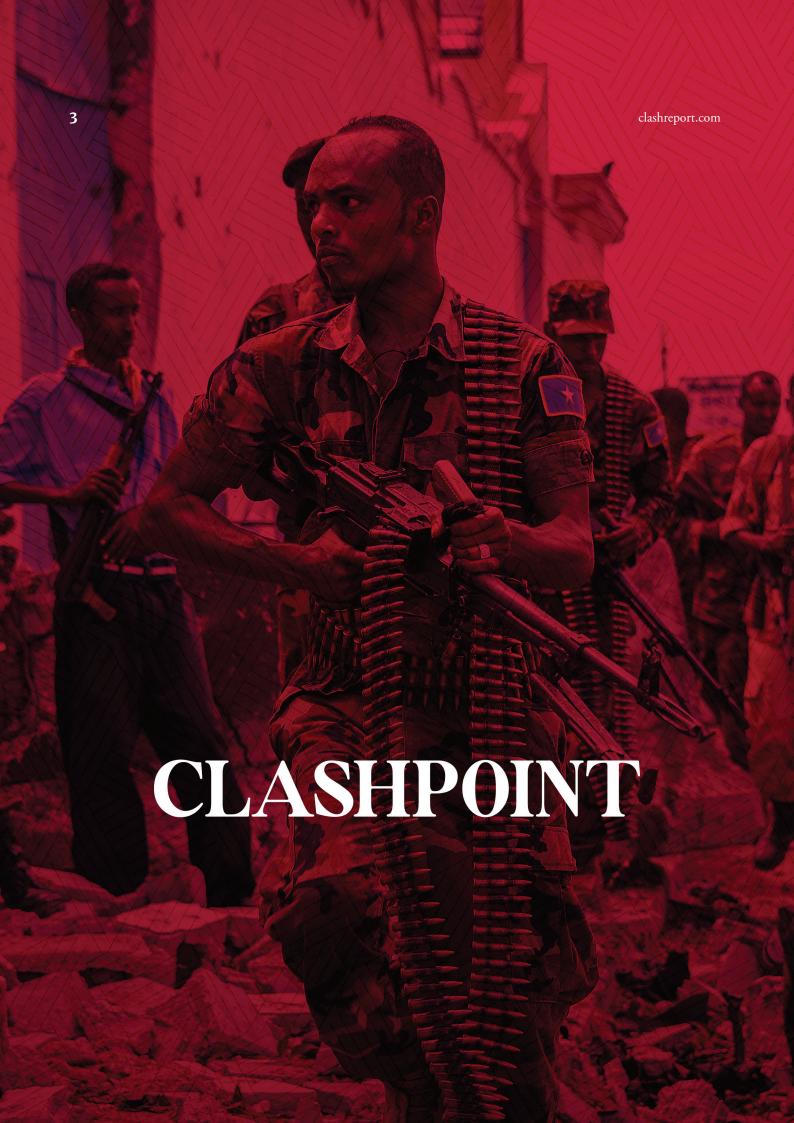












SUDAN

This broader pattern of abuses also extended to El-Fasher, where medics said RSF fighters killed four civilians including a child, while the Sudan Doctors Network recorded four additional killings in the Al-Daraja neighborhood.

The same area witnessed the assassination of the state news agency director Taj Al-Sir Ahmed Suleiman and his brother inside their home, further heightening fears over targeted violence.

In West and South Kordofan, RSF-linked abuses continued as doctors warned of the unknown fate of dozens of women and children trapped in Babnousa after heavy clashes.

The Sudan Doctors Network later confirmed that over 100 families from Babnousa and nearby villages, including children and pregnant women, are being held in severe conditions, with verified footage showing women beaten

and humiliated over alleged ties to the army.

Simultaneously, medics reported that RSF abducted around 150 youths, including children, in South Kordofan despite RSF chief Mohamed Hamdan Dagalo announcing a three-month humanitarian ceasefire.

MSF also withdrew staff from Zalingei Hospital after a stret-cher-bearer was killed by a stray bullet and four others were wounded, underscoring the collapse of safe humanitarian access.

Fighting between the army and armed groups escalated as the SAF recaptured Mabsut in South Kordofan after clashes with RSF-allied fighters, and later liberated the Mabsuta area from SPLM-N (al-Hilu) militia control.

The army also conducted a precision strike on an SPLM-N (al-Hilu) training site near Kauda—denying

claims that a school had been targeted—and repelled an RSF attack on Babnousa in West Kordofan. Meanwhile, the death toll from a drone strike in South Kordofan rose to 47, and a separate bombing of the Nebe'ul Hanan kindergarten in Kalogi—carried out by Janjaweed and SPLM elements—killed more than 100 people, with only five of roughly 60 children surviving.

Across the south, at least 40 people were killed amid communal tensions, according to residents involved in burials, reflecting a rapidly deteriorating security landscape. In parallel, displacement surged as hundreds of unaccompanied children fleeing Darfur violence arrived in Tawila camp, where the UN recorded 354 new arrivals between late October and November 22, many having lost parents who were killed, detained, or disappeared along the route.

Key Updates

Witnesses reported that RSF fighters are detaining survivors of the Darfur siege for ransom, with those unable to pay beaten or killed, echoing similar accounts from a Darfur city overrun by RSF units in late October where survivors were likewise held for ransom and many remain missing.



SOMALI

Security forces across Somalia and Puntland intensified counter-ISIS and counter-Al-Shabaab operations, including the seizure of Marraagane well in Baallade valley—one of ISIS's last positions in Bari region—and the arrest of logistics operative Cabdirisaaq Yaasiin "Sugulle" in the Calmiskaad mountains.

Puntland also confirmed joint air—ground operations with AFRICOM and reported a direct strike on Habar Bajuuke. Meanwhile, new reports indicate ISIS leader Abdulqadir Muumin remains in the Cal Miskaad mountains despite intensified offensives aimed at dismantling his remaining cells.

Al-Shabaab faced simultaneous pressure as the army's 7th Battalion destroyed roadside IED sites around Afgooye, the 242nd Battalion cleared militant hideouts between Cali Yabaal and Geeriile junction, and government troops with local fighters advanced toward Xawaadley in Middle Shabelle.

In Lower Shabelle, NISA's Gaashaan unit killed the Al-Shabaab commander responsible for IED construction, while a senior commander and his guards were killed near Cali Heele. NISA also announced the arrest of an 11-member Al-Shabaab cell accused of espionage and attack planning in Mogadishu and surrounding regions.

Joint federal—Jubbaland forces advanced on Jamaame along the main road and Jubba River to pressure Al-Shabaab's hold on the town, followed by a Danab—Darawiish night raid that killed senior figure Faarax Jibriil and seven bodyguards. Additional federal operations further expanded toward Middle Shabelle and Lower Juba as the government aimed to degrade militant leadership and secure key rural corridors.

Tensions surfaced with the army reporting that clan militias operating between Leego and Yaaqbariweyne have established links with Al-Shabaab, while a clan clash on the Hiiraan—Middle Shabelle border caused multiple casualties. Puntland separately accused federal officials of holding secret talks with Al-Shabaab, warning such engagement undermines security.

Somalia's security landscape also intersected with international concerns: the U.S. military denied reports claiming American ground raids in Baallade valley, Spain contributed €1 million to AUSSOM to counter instability risks, and AFRI-COM affirmed heightened regional support under updated U.S. policy across Ethiopia, Somaliland, Puntland, and the wider Horn.



Key Updates

Additional operations killed eight ISIS militants in Daanyo valley and targeted 10–15 fighters hiding in Habarbakuuje and Mareero cave networks during a joint Puntland–U.S. raid supported by MH-60 helicopters and MQ-9 Reaper strikes.

NIGERIA

Nigeria's security situation deteriorated sharply as armed groups carried out mass kidnappings across multiple states, including more than 30 people abducted in Borno and Kano, over 30 women and girls seized in a nighttime raid in Sokoto's Wurno area, and the killing of an Anglican priest held captive after a month-long abduction.

Parallel attacks continued in rural areas, with Kano residents rioting outside a police station demanding the handover of suspected kidnappers. A JNIM video claimed the group's first attack in Nigeria, filmed in Baruten LGA, Kwara State, while bandits were reported to have used a surveillance drone before a church assault in Kogi, where the pastor, his wife and others were later rescued.

Military operations responded across the northwest between 17–26 November, achieving major gains including the arrest of a key arms trafficker, the rescue of kidnapped civilians, and the disruption of terrorist plots.

Additional actions included troops from 6 Brigade/OPWS arresting three suspected arsonists in Taraba's Karim town, 12 Brigade rescuing six abducted worshippers in Kogi, and the army killing four militants in Taraba's Usmanu village while arresting a serving police officer alleged to be collaborating with the armed group.

Delta State Police also arrested multiple suspects and seized illegal arms and stolen property in sweeping operations across Ughelli, Oghara, Sapele and Asaba.

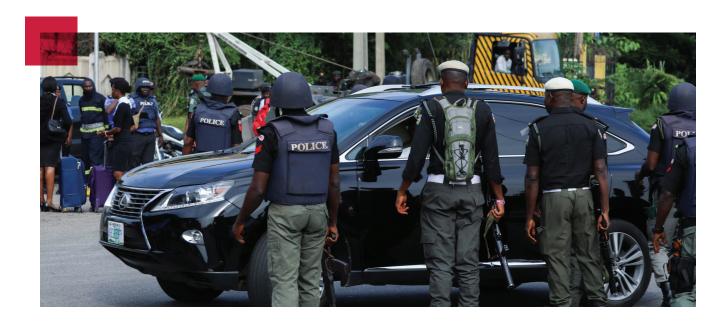
Nigeria's air campaign intensified as the Air Force conducted coordinated strikes in Katsina, destroying bandit structures, while a separate operation in Chibok disrupted an ongoing ISWAP attack, neutralising fighters and preventing further assaults. Strategic posture adjustments continued as GOC Maj-Gen Oluremi Fadairo pledged stronger measures across the South-East during his first tour of 82 Division units, and President Bola Tinubu declared a nationwide security emergency following escalating killings and mass abductions.

He later ordered 100,000 police officers withdrawn from VIP duties and redeployed to public security roles.

Nigeria also announced a renewed security partnership with the United States focused on counterterrorism and intelligence sharing, while rejecting claims of Christian persecution, even as Washington imposed new visa restrictions targeting officials accused of violating religious freedoms.

Community tensions grew as Yobe State Police held a strategic security conference to protect 150 public schools and key infrastructure across 17 councils, and a Catholic priest, Rev. Emmanuel Ezema, was abducted in Kaduna amid ongoing ransom-driven kidnappings.

President Tinubu granted asylum and protection to Guinea-Bissau presidential candidate Fernando Dia Da Costa at the Nigerian Embassy following threats, prompting a request for ECOWAS security reinforcement.

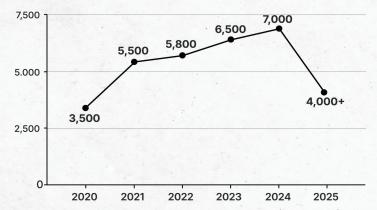


Africa's Kidnapping Crisis: Key Metrics 2020–2025

Africa's abduction landscape has surged sharply since 2020, driven by ransom-focused groups, regional hotspots and a growing wave of large-scale school kidnappings.

CLASH REPORT INFOGRAPHIC SERVICE

Continental Scale & Yearly Trends



>> Total
victims
(20202025):
27,000+
abducted
across the
continent

Geographic & Target Concentration

65%+
of abductions
occur in three
hotspots—
Nigeria, DRC,
and Burkina
Faso.

Local civilians: ≈75% of all victims.

Students/
education staff:
≈10% of
cases, 15% +
of victims.

Expatriates: <1% of cases, highest-cost category.

Major 2025 case: 303 students + 12 teachers abducted.

Motivation & Mass-Abduction Metrics

- 80%+ of all abductions are ransom-driven.
- Mass abductions: 5-10% of cases, 30%+ of victims.
- 2024: 287 students taken in a school raid.
- 2025: 303 students + 12 teachers in the largest recent school kidnapping.

Motivation & Mass-Abduction Metrics

21 Nov 2025: 303 students + 12 teachers abducted Same week: ≈25 schoolgirls abducted in a separate attack. | School attacks | tripled: ≈790 (2020) | → ≈2,445 (2024).

Schools now function as major, high-volume targets.

MALI

JNIM claimed multiple attacks and operations across Mali, including repelling a Malian army advance near Sikasso, killing seven FAMa soldiers and abducting nine more, and seizing weapons in clashes around the region.

The group also claimed an assault and seizure of the Zantiguila checkpoint in Koulikoro, about 50 km from Bamako along the Bamako-Ségou road, as well as attacking army positions between Koulikoro and Zantiquila.

Additional claims included striking an army convoy with an IED between Bla and Yangasso, targeting an army vehicle near Djenné in Mopti, ambushing a convoy between Mourdiah and Mankana, and striking an army vehicle with an IED between Kidal and Anefis. Local sources said JNIM burned farmers' machinery in Kokala.

The group also released a video showing two abducted ORTM journalists—director Daouda Koné and cameraman Salif Sangaré—kidnapped between Sévaré and Konna on 14 October. Two Egyptians abducted by JNIM were later released without ransom after the group determined they were ordinary traders.

Meanwhile, FAMa reported destroying a militant fuel depot in Sofara and positions east of Tidermene through airstrikes, while pro-government channels said new operations were launched from Sikasso toward the Côte d'Ivoire border following recent troop deployments.

Fuel access improved gradually across central Mali as several escorted tanker convoys reached major towns despite jihadist blockades.

A convoy reached Mopti to public celebrations after two months of severe electricity shortages, eight tankers arrived in San—restoring electricity for the first time in over two months—and the army escorted tankers to Bamako, easing prolonged fuel shortages triggered by insurgent disruptions. Additional petrol deliveries were restored after tankers cleared customs, though a mild diesel shortage persists.



Mali: JNIM Fuel Blockade Disrupts Medical & Logistical Systems

A months-long JNIM blockade has severely restricted fuel flows, disrupting mobility, medical access, and critical services across central and southern Mali.



Core Situation of the Fuel Blockade

- Blockade began in September 2025.
- JNIM targets fuel convoys from Côte d'Ivoire, Guinea, Senegal.
- Tankers and military escorts are ambushed.
- Fuel flow to Bamako, Ségou, Koutiala, Mopti is severely cut.
- Nationwide mobility and energy access have declined.



Direct Effects on Health Services

Patients reach hospitals

less due to fuel shortages.

Bamako's fuel situation is

severe but not total depletion.

Niono: Critical Bottleneck Area

- As of 24 Nov 2025, only one month of fuel remains.
- Niono stations are almost empty.
- Dougouba, K2, Sokolo, Diabaly, C3, Nampala and CSREF rely only on reserve fuel.
- Solar system provides 10 hours/day of power to operating theatre, paediatrics, lab, neonatology.

Referrals are slower

and more expensive.

Demand for imported medical

supplies rose; access and treatment speed declined.

Referral Delays, Cost Increases, Mobility Issues

- Emergency referrals continue but fuel is limited.
- Rental vehicle prices rose sharply on the Nampala route.
- Fuel shortages reduce mobility for both patients and health staff.



BURKINA FASO

JNIM activity surged across Burkina Faso with a series of attacks and claims spanning multiple regions. The group released footage from a training camp and claimed the capture of VDP positions between Barsalogho and Kaya, in Dougouri, and in Fada N'Gourma, while also reporting the seizure of a VDP point in Tenkodogo and a post in Sebba.

Additional statements said JNIM killed 10 VDP and seized rifles, motorcycles and ammunition during assaults in Fada N'Gourma, and killed two VDP with equipment taken in Bondokuy.

The group further claimed seizing motorcycles and ammunition in an assault on a military position in Tangaye, and capturing a military vehicle, rifles and ammunition in Natiaboani.

Local sources also reported that JNIM attacked Tiantiaka in Tibga commune, killing 10 civilians and burning numerous homes and shops, reinforcing the group's expanding operational footprint across the country.

JNIM released an infographic claiming over 62 raids, 6 ambushes and 27 IED attacks during Jumada al-Awwal, reporting 139 killed along with the capture of vehicles, motorcycles and ammunition.



NIGER

JNIM claimed responsibility for an IED attack on a military vehicle between Torodi and Makalondi, reporting casualties among soldiers in a border corridor long affected by insurgent activity.

MPLJ reportedly conducted additional landmine attacks around Agadem following earlier assaults, *highlighting* continued multi-actor militant pressure across vulnerable transit zones.

Separately, Niger sent an 82-tanker fuel convoy to Bamako under Nigerien-Malian military escort, breaking a two-month JNIM blockade; the convoy took 21 days to complete the 1,400 km journey, with Russia pledging 160,000-200,000 tonnes of fuel support and Africa Corps units reportedly involved in escort duties.







MOZAMBIQUE

Escalating violence in northern Mozambique has displaced nearly 100,000 people, according to the UN, as militant attacks spread into previously safe districts faster than aid agencies can respond.

IOM reported that 66,000 people fled from Memba to Erati between 16–22 November alone, underscoring the deteriorating security situation and growing risks to women and children. Persistent insurgent threats in Cabo Delgado also contributed to Britain's withdrawal of \$1.15 billion in backing for the TotalEnergies-led LNG project, citing security concerns that continue to hinder operations and delay investment decisions.

IOM: The International Organization for Migration is the leading international agency that works with countries to support safe and orderly migration.

DR CONGO

Fighting intensified across eastern DRC as AFC/M23, FARDC, Wazalendo militia and at times Burundian forces clashed in Uvira, Walungu and Kabare ahead of the Washington peace-deal signing between Presidents Tshisekedi and Kagame. Fresh confrontations between M23 rebels and the army—supported by Wazalendo units—forced residents to flee multiple localities, driving new waves of displacement in an already unstable region.

Meanwhile, two major river-transport accidents occurred: one boat capsized on the Luangatshimo River in Kasai province, leaving at least 37 people missing, while another incident in the northwest left around 20 people feared dead, with passengers still unaccounted for amid chronic overcrowding and unsafe travel conditions.

M23: M23 stands for the March 23 Movement, an armed rebel group operating in the Democratic Republic of the Congo.

UGANDA

One person was killed at an opposition rally for presidential challenger Bobi Wine, according to police, heightening tensions ahead of political events.

The UN condemned Uganda's widening crackdown on opposition figures, reporting that hundreds of Wine's supporters have been arrested and detained this year, warning that escalating repression threatens political freedoms and undermines conditions for a credible vote.

Uganda received Russian engineering and naval equipment worth about \$53 million during a UPDF handover ceremony attended by President Museveni and Russia's ambassador. The package includes major assets intended to strengthen logistics and naval capacity as Uganda deepens external defence partnerships.

KENYA

Seven people, including police reservists, were killed in coordinated cattle-rustling raids across multiple villages in Kenya's Upper Eastern region, with authorities reporting simultaneous attacks by armed groups in an area long affected by livestock conflict.

Meanwhile, a parliamentary inquiry accused British troops of repeated sexual misconduct and environmental damage during training deployments, describing their footprint as an "occupying presence"; UK officials expressed regret and said new allegations would be investigated



SOUTH AFRICA

South African authorities arrested multiple individuals in a widening investigation into Russia-linked recruitment networks.

Police detained SAFM radio host Nonkulule-ko Mantula and four others over an alleged foreign-influence plot, while another group of four men was intercepted attempting to travel via the UAE to join a foreign military.

Separately, Duduzile Zuma-Sambudla resigned from parliament amid allegations she helped recruit men to fight for Russia.

Police also arrested four men suspected of being recruited to fight for Russia as they attempted to leave the country, as Pretoria intensified scrutiny of foreign-linked mobilisation networks.

SENEGAL

The Senegalese navy conducted its first anti-ship missile test from a Walo-class offshore patrol vessel, marking a shift from a coastal patrol force toward a more capable blue-water navy. The successful live-fire trial significantly strengthens Senegal's deterrence posture and naval projection capacity.

Student-security clashes escalated at Cheikh Anta Diop University as protesters demanded unpaid stipends and financial aid, reflecting rising public frustration amid Senegal's deepening financial crisis.

The unrest comes as the IMF appointed Mercedes Vera Martin as its new mission chief and continues investigating how billions in previously undisclosed public debt went undetected, with the country's debt load reaching roughly 132% of GDP by the end of 2024.

Key Updates

The developments indicate that South Africa has markedly tightened its oversight of Russia-linked mobilization networks and adopted a more proactive internal security posture. The fact that the investigations also involve political figures signals growing concern over the potential influence of external actors on domestic institutions.





SUDAN

Sovereignty Council chief Abdel Fattah al-Burhan met Eritrean President Isaias Afwerki in Port Sudan to discuss strengthening bilateral ties and enhancing political and security coordination as both countries face regional instability and shared border concerns.

The government simultaneously announced its readiness to work with the UN to advance peace, improve security, and facilitate humanitarian access across conflict-affected regions.

Burhan appealed to U.S. President Donald Trump to intervene to help end the war with the RSF, calling for pressure to halt external support for the paramilitary group and to push both sides toward a negotiated settlement.

Consistent with this stance, he reiterated that the SAF will not enter talks unless the RSF fully disarms, insisting that any peace initiative that does not dismantle the RSF is "completely rejected." He added that no political solution is possible while "the militia remains armed," and separately stated that the Muslim Brotherhood "does not exist" and has no ties to the army or government.

The Sudan Doctors Network reported nine deaths in an RSF-led attack on a kindergarten in South Kordofan, while the UN warned of worsening child malnutrition in White Nile State, with 13% acute malnutrition in Tendelti and over 30% underweight children in El Jabalain. Russia's ambassador Andrei Chernovol said it is still too early to

move the Russian embassy back to Khartoum despite Moscow's support for Sudan's efforts to restore state functions.

The government revived talks with Russia on establishing a 25-year Red Sea naval base capable of hosting up to four vessels and 300 personnel, while Sudan seeks advanced air-defense systems and Su-30/Su-35 fighter jets in return.

This prospective arrangement reflects the government's attempt to secure long-term military infrastructure and hardware amid ongoing conflict pressures.



SOMALIA

Somalia announced several key political and diplomatic developments, including Petroleum Minister Daahir Shire confirming that major international energy firms—among them U.S. companies—are now seeking to launch offshore oil exploration.

The Federal Government also reaffirmed its commitment to maritime security, strengthening coastal coordination to protect regional sea lanes and international shipping routes. Additionally, Somalia formally joined the International Mobile Satellite Organization (IMSO) to enhance maritime tracking and monitoring capabilities.

Federal authorities repatriated 165 citizens stranded in Libya, including 27 children, in an EU- and IOM-supported operation. The government also offered Somaliland a revenue-sharing arrangement for the new e-Visa system introduced in September 2025, presenting it as a step toward easing tensions.

Minister Mahamuud Aydiid Dirir stressed that Mogadishu's capital status cannot be claimed by any side, citing Article 9 and the need for full constitutional review by both houses of Parliament.

President Hassan Sheikh confirmed that Al-Shabaab members

have attempted to register for NIRA national ID cards, arguing this could ultimately support biometric tracking and state oversight. He also announced the formation of a group of religious scholars within the army to reinforce discipline and ethical conduct.

Somalia deepened diplomatic engagement with Kazakhstan and Uzbekistan as both countries received credentials from newly appointed Somali ambassadors, marking expansions in Central Asian outreach.

Further regional cooperation emerged with Morocco as foreign and prime ministers signed key agreements on diplomacy, security and development, while defence ministers from Somalia and Yemen met in Cairo to strengthen joint maritime security across the Red Sea and Gulf of Aden.

Somaliland–U.S. relations advanced through meetings between President Abdirahman "Cirro," AFRICOM commander Gen. Dagvin Anderson, and senior U.S. diplomats to discuss enhanced security cooperation. Somalia–Germany ties also grew as Berlin formally recognized Somalia's diplomatic passport for entry and residence after earlier signals that recognition was under consideration.

Political friction intensified abroad as President Donald Trump halted TPS protections for Somali nationals, citing an alleged security threat from a Minnesota-based Somali group, while ordering a review of Green Card approvals for Somalis and citizens from 18 other "high-concern" countries. U.S. authorities also prepared targeted operations in Minnesota against undocumented Somali immigrants. Congresswoman Ilhan Omar condemned Trump's rhetoric, and Somali citizens widely criticized his remarks calling Somalia "stinking," while Prime Minister Hamza Abdi Barre urged the country to move on from such comments.

Sweden charged a 23-year-old Swedish-Syrian man for attempting to travel to Somalia to join Islamic State and for funding the group via cryptocurrency. Meanwhile, an investigative report in the U.S. said Somali-linked networks in Minnesota diverted millions from Medicaid social-care programs, with some of the stolen funds allegedly reaching Al-Shabaab through illicit channels.

Morale-affecting cuts emerged as more than 680 UN staff working in Somalia were laid off in 2025 due to funding shortages impacting humanitarian relief, protection and support programs nationwide.

Key Updates

Witnesses reported that RSF fighters are detaining survivors of the Darfur siege for ransom, with those unable to pay beaten or killed, echoing similar accounts from a Darfur



LIBYA

Authorities said Sudanese refugees will be treated as Libyans with access to schools and hospitals, framing the move as a humanitarian response to rising regional displacement even as deportations of other Sub-Saharan migrants increase.

The World Food Programme resumed full humanitarian assistance for Sudanese refugees after earlier funding gaps, supporting more than 400,000 arrivals, with numbers expected to surpass 500,000 by year-end as fleeing populations continue crossing into Libya.

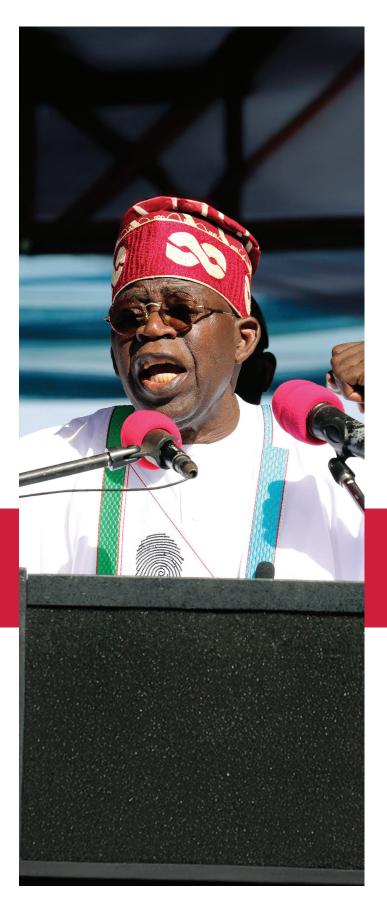
ICC defendant Al Hishri, accused of overseeing torture and abuse at Mitiga prison, requested release pending trial, part of broader international investigations into Libyan crimes dating back to 2011.

At the same time, Greece rejected the Turkey–Libya maritime pact as "legally non-existent," with Defence Minister Nikos Dendias warning that Athens will not tolerate attempts to impose its terms or alter maritime boundaries affecting Greek islands.





ICC: The International Criminal Court (ICC) is a permanent tribunal responsible for prosecuting the most serious international crimes, including war crimes, crimes against humanity, and genocide.



Nigeria's political landscape continued to shift as the PDP issued formal expulsion certificates to FCT Minister Nyesom Wike and ten others, reaffirming their removal from the party following an NWC meeting that deepened internal fractures ahead of broader political realignments.

President Bola Tinubu nominated former military chief Gen. Christopher Musa as defence minister amid rising mass kidnappings, while outgoing minister Mohammed Badaru Abubakar resigned on health grounds. Tinubu later appointed Musa formally, reinforcing a security-heavy orientation within the cabinet.

A new RPI Policy Index ranked Nigeria among Africa's widest gaps between policy delivery and public trust, placing the country in the "Strugglers" tier with a score of 52.3—highlighting persistent governance challenges despite partial policy successes.

The UN warned of record hunger driven by militant attacks and aid cuts, noting that nearly one million people depend on WFP assistance and over 300,000 children face heightened risk as funding shortages force nutrition reductions.

Nigeria's central bank imposed tighter cash-withdrawal limits beginning January 2026—capping weekly withdrawals at 500,000 naira for individuals and 5 million for companies—to curb money laundering and mitigate security risks, while removing fees on excess deposits.

Nigeria's telecom sector continued its rapid expansion, growing 21.49% in Q3 2025 as subscribers reached 220 million, up from 169.3 million at the start of the year. Meanwhile, Nigeria's state-owned DICON-D7G delivered its first batch of nearly 1,000 DG-103 assault rifles—locally licensed variants of the AK-103—marking a milestone toward domestic small-arms production.

Separately, troops reported stabilisation progress in Taraba and Kogi after arsonist arrests and abduction rescues, while the Church of Nigeria confirmed the killing of an Anglican priest held captive in the northwest.

■ Nigeria: Record Hunger Driven by Insurgent Attacks & Aid Cuts

Northern Nigeria is entering its worst recorded food crisis as escalating militant attacks, mass abductions, and shrinking aid pipelines simultaneously deepen the emergency.



Scale of the Hunger Emergency

- 35 million people may face hunger in 2026,
 - the highest ever recorded.
- Nearly 1 million people in the northeast
 - rely fully on food assistance.
- In Borno, around 15,000 people face famine-like or catastrophic hunger.

Rural Collapse & Malnutrition Pattern

- 6 million people in Borno, Adamawa, Yobe cannot access basic food.
- Sorno, Sokoto, Yobe, Zamfara show the highest child malnutrition levels.
- → 150 of 500 nutrition centres closed in July due to low funding.
- ➤ These closures removed support for 300,000+ vulnerable children.
- Malnutrition has shifted from serious to critical across many areas.

Funding Collapse & Aid Cuts

Food and nutrition funds will run out by December 2025,

according to WFP.

The United States cut major portions of

its foreign assistance budget.

Millions risk losing vital aid during 2026,

worsening the crisis further.

Several European donors also reduced

their humanitarian contributions.



ETHIOPIA



Uganda announced a halt to granting refugee status to nationals from countries without active conflict, including Somalis, Eritreans and Ethiopians. Minister Hilary Onek said the system must prioritize individuals fleeing verified war zones, marking a shift in eligibility rules with direct implications for regional mobility and asylum access.

The Ethiopian Human Rights Commission met Somali Region President Mustafe Cagjar in Jigjiga, issuing directives focused on protecting civil rights and urging the regional administration to strengthen accountability mechanisms.

The directives call for addressing reported abuses through concrete institutional reforms, reinforcing oversight structures within the region.

Ethiopia and the UAE reaffirmed their intention to deepen bilateral ties as Ambassador Jamal Beker presented his credentials in Abu Dhabi, with the UAE pledging continued support for Ethiopia's development efforts and broader regional integration.

THE CURRENT LANDSCAPE IN LIBYA SHOWS THAT THE COUNTRY'S SECURITY ARCHITE-CTURE REMAINS FRAGILE UNDER FRAGMENTED STATE AUTHORITY AND MOUNTING REGIONAL PRESSURES, WHILE POLITICAL AND ECONOMIC ENGAGEMENT WITH EXTERNAL ACTORS HAS BECOME A KEY TOOL FOR MANAGING THIS FRAGILITY AND REBUILDING INSTITUTIONAL CAPACITY.

ALGERIA

Algeria's armed forces entered a period of heightened turbulence after President Abdelmadjid Tebboune ordered a sweeping reshuffle of top defence leadership, deepening uncertainty within one of Africa's strongest militaries and signalling shifting power dynamics inside the security establishment.

Leaders meeting in Algeria called for reparations from Western nations for colonial-era crimes, insisting that restitution is an obligation rather than a favour and urging concrete mechanisms to return stolen wealth and address historical injustices.

In a separate development, France criticised an Algerian court's decision to uphold a seven-year sentence for French journalist Christophe Gleizes, saying its diplomatic appeals had been ignored.

Nigeria and Algeria strengthened institutional ties as Algeria's customs chief pledged enhanced cooperation with Nigeria on training, modernisation and trade facilitation during meetings with visiting senior customs officers in Algiers, part of broader efforts to deepen cross-border coordination and improve regional enforcement capacity.

Algeria and Egypt signed 18 agreements and memorandums across multiple sectors during their High Joint Committee meeting, aiming to boost cooperation and raise bilateral trade to \$5 billion.



TUNISIA

Tunisia intensified its crackdown on opposition figures as police arrested senior opposition leader Nejib Chebbi to enforce a 12-year conspiracy sentence—part of a sweeping case in which more than 40 politicians, *lawyers and business figures received sentences of up to 45 years*.

Authorities also detained opposition figure Ayachi Hammami to enforce a five-year sentence for conspiracy against state security.

The arrests follow earlier appeals court rulings that handed lengthy prison terms to numerous government critics amid mounting public protests and *heightened pressure* under President Saied's rule.



MOZAMBIQUE

South Africa and Mozambique signed a landmark energy cooperation agreement in Maputo aimed at accelerating shared infrastructure projects and expanding bilateral power trade—an initiative officials hailed as a major step toward strengthening regional energy security.

President Cyril Ramaphosa travelled to Maputo for the 4th Bi-National Commission at the invitation of President Daniel Chapo, reinforcing deepening diplomatic and technical ties between the two countries.



GUINEA-BISSAU

Guinea-Bissau underwent a rapid power shift after the military ousted President Umaro Sissoco Embaló, arrested him, and blocked the publication of election results. The junta named Chief of Staff Gen. Horta Inta-A Na Man as transitional head of state for one year, installed five army officers in government, banned protests, and lifted the night curfew as it tightened control in the capital, which remained paralysed in the immediate aftermath of the coup.

The electoral commission later announced it could not complete the 23 November presidential vote after armed men seized ballots, tally sheets and destroyed servers. Embaló left the country after his detention—first heading to Senegal and later appearing in Brazzaville—marking his first public relocations since the takeover.

Regional and international responses intensified. The African Union suspended Guinea-Bissau with immediate effect, citing the unconstitutional change of government. ECOWAS "unequivocally condemned" the coup, warning that another military takeover deepens instability in West Africa after recent ruptures in Mali, Burkina Faso and Guinea.

Key Updates

ECOWAS mediators also met transitional leaders as they pushed for a roadmap to restore constitutional order. Nigeria granted asylum and protection to opposition candidate Fernando Dias da Costa—who reported threats following the coup—sheltering him in its embassy as political rivals sought safety amid junta rule.





Coup Framework

On 26 Nov 2025 the army detained the president.

Both candidates claimed victory before results were released.

Military command announced "full control" and takeover.

Borders were closed and state bodies were suspended.

This added a new step to the post-2003 **coup cycle**.

Political Rupture & Institutional Breakdown

Embaló removed the prime minister before the **23 Nov vote**.

Braima Camará was appointed to run the **election process**.

On 25 Sep 2025 **Pai Terra Ranka** was disqualified by the court.

On 14 Oct 2025 Simões Pereira's candidacy was blocked.

Excluding **PAIGC** erased all electoral legitimacy.

Core Drivers of the Coup

Civil power used the judiciary as a political tool.

The army cited the resulting constitutional vacuum.

Embaló's purges accelerated the crisis dynamics.

Narco-linked networks deepened the **power struggle**.

These conditions made the **coup effectively unavoidable**.

Linkages to the 2022 Attempt

The 1 Feb 2022 assault targeted the government palace.

Eleven people were killed, **including** six soldiers.

Embaló described the incident as an assassination attempt.

Perpetrators were linked to drug-trafficking networks.

The 2025 coup shows these networks remained active.





DR CONGO

A U.S.-brokered agreement was signed between DR Congo and Rwanda to end eastern fighting and open access to critical minerals, with President Trump praising the "courage" of both leaders. Washington confirmed that several key elements of a prior U.S.-backed plan agreed in June remain unimplemented, even as Trump hosted both leaders in an intensified diplomatic push toward a durable settlement.

Separately, Trump's name was added to the U.S. Institute of Peace sign ahead of the ceremony, following earlier administration attempts to assert control over the institution. In civil society developments, a rights group filed a lawsuit in the United States accusing Apple of sourcing conflict minerals tied to child labour, forced labour and armed groups in Congo; Apple strongly denied the allegations, asserting that its supply-chain standards prohibit materials linked to exploitation or conflict.

Health officials in the DRC also declared the latest Ebola outbreak over after causing at least 34 deaths since August, noting that surveillance will continue as affected areas transition back to routine monitoring.

TANZANIA

President Samia Suluhu Hassan defended security forces after post-election violence left several people dead, rejecting an EU parliamentary vote to suspend aid and insisting that police actions were lawful.

Heightened tensions prompted the government to cancel Independence Day celebrations and redirect funds toward repairing infrastructure damaged during the unrest. *Prime Minister Mwigulu Nchemba said reconstruction was a priority as the country faced mounting fiscal and social pressures.*

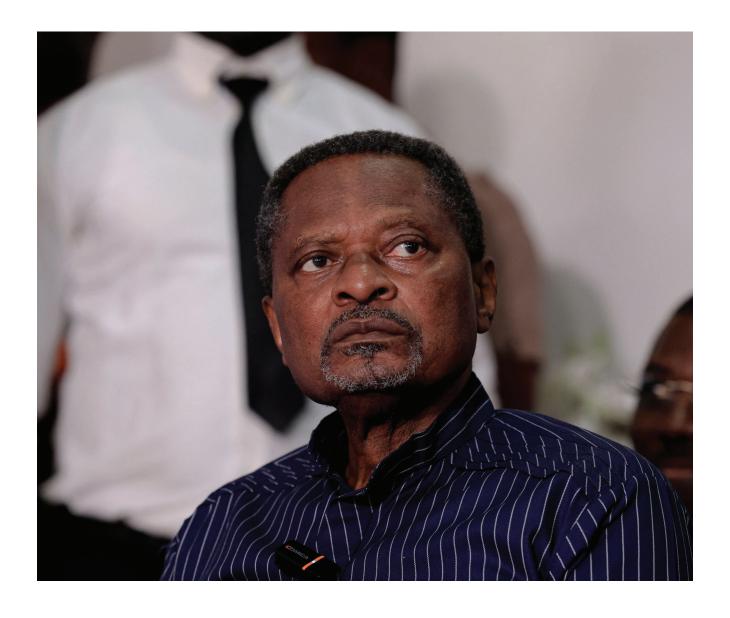
CAMEROON

Cameroon's political landscape grew increasingly volatile as opposition leader Anicet Ekane, 74, died in detention months after his October arrest on insurrection charges, prompting intensified criticism of government crackdowns and renewed scrutiny of the treatment of political detainees.

Tensions also rose after opposition figure Issa Tchiroma Bakary fled to Gambia following the disputed election; Gambian authorities confirmed he arrived on 7 November and is being hosted on humanitarian grounds to ensure his safety amid escalating political strain.

CÔTE D'IVOIRE

Côte d'Ivoire rejected online claims suggesting the presence of an Azawad movement inside the country, stating that circulating images are unauthenticated and may be AI-generated. Officials stressed that security services found no evidence of any Azawad-linked office or activity on Ivorian territory.





The 2025 Johannesburg declaration became one of the G20's most unified texts, merging peace, climate action, and Africa-focused development into a single framework.

Summit Framework

The first G20 Summit ever held on the African continent.

Dates: 22-23 November 2025.

The declaration was approved earlier than scheduled.

Core focus: peace, climate finance, energy transition, Africa's development priorities.

U.S. Boycott and Political Impact

The United States boycotted the summit and **objected to the declaration**.

Objections mainly targeted climate and **energy language**.

Despite this, the declaration passed unanimously.

Outcome: G20 maintained a shared position on Global South priorities.

Climate and Energy Gap

The 1.5°C goal was reaffirmed.

Developing countries' climate-action needs before 2030: \$5.8–5.9 trillion.

Africa: 600M people without electricity; 1B+ without clean cooking fuel.

Clean-cooking deficit linked to **2M annual deaths.**

Critical minerals: goal is domestic processing and value creation, not raw exports.

Global Conflict Framework

Four major crises grouped together: Sudan, DRC, Ukraine, Palestine.

Emphasis on fair, comprehensive, and lasting peace.

Principles reaffirmed: Territorial integrity and rejection of territorial gain by force.



SOUTH AFRICA



Tensions with Washington escalated sharply after President Cyril Ramaphosa condemned former U.S. president Donald Trump's call to bar South Africa from future G20 summits. Washington later confirmed Pretoria's exclusion from the 2026 G20 summit, appointed Poland as the replacement participant, and cited allegations of "white genocide" and South Africa's refusal to symbolically hand over the presidency—claims Pretoria rejected as politically motivated.

Domestically, Pretoria rolled out its "Butterfly Strategy," a new diplomatic posture seeking trade agreements across Asia, the Middle East, Latin America and Africa to reduce dependence on the United States.

Meanwhile, a new U.S. Senate bill proposing a two-year AGOA extension called for South Africa's removal from the programme, adding further pressure on President Ramaphosa. Manufacturing sentiment also fell to its lowest level since the pandemic as weak demand, persistent power constraints and declining orders deepened concerns over South Africa's economic trajectory.

South Africa and the UK faced uncertainty over a \$1 billion British debt-guarantee facility for the energy transition, with London reconsidering whether to keep the pledge active as Pretoria's transition plan stalls.

Japan also entered talks to provide additional support for South Africa's energy-sector overhaul, reflecting growing international involvement in stabilising the country's generation capacity and utility reforms.

South Africa achieved soft-power recognition as six local wine estates ranked among the world's top vineyards in the 2025 World's 50 Best Vineyards list, highlighting the country's leadership in African winemaking and its rising global tourism appeal.

SOUTH AFRICA REITERATED THAT IT WOULD NOT YIELD TO U.S. PRESSURE OR ACCEPT ACCUSATIONS OF RACIAL DISCRIMINATION. THE RIFT FOLLOWS DETERIORATING BILATERAL RELATIONS EVIDENT AT THE G-20 AND RAISES CONCERNS ABOUT FUTURE POLITICAL AND ECONOMIC ENGAGEMENT.



SOMALIA

Somalia's offshore hydrocarbon prospects gained momentum as several international companies—including U.S. firms—began pursuing exploration opportunities, according to Petroleum Minister Daahir Shire.

The Federal Government also expressed readiness to share e-Visa revenues with Somaliland in an effort to ease political tension and promote cooperative management of travel and immigration services.

Spain approved a €1 million contribution to the AUSSOM mission to help address financial shortfalls and support regional security.

Federal authorities repatriated Somali migrants stranded in Libya following months of coordination with the EU and IOM, reflecting ongoing investment in mobility management and humanitarian support systems.

LIBYA

Major U.S. and European oil firms qualified for Libya's first exploration bidding round in 18 years, signalling a cautious return to Libya's energy sector as authorities seek to revive long-stalled upstream activity.

The eastern government also signed an executive agreement with Türkiye's GECERT to conduct technical studies for large-scale renewable-energy projects, marking another step toward diversifying the country's long-term energy portfolio.

The Central Bank reported 11-month revenues of 115.4 billion dinars, highlighting Libya's continued dependence on oil and the mounting pressure on foreign-exchange reserves following recent declines in crude income.

AUSSOM:

The AUSSOM is an African Union-led peace and stabilization mission deployed from January 2025 to support Somali security forces and help stabilize Somalia. Its mandate includes strengthening federal and state-level security institutions, assisting in the transition from ATMIS, improving coordination against Al-Shabaab, and enhancing the protection of key population centers and strategic corridors. The mission also works to expand joint operations, accelerate force integration, and provide operational mentoring to Somali units, while supporting humanitarian access and helping lay the groundwork for longer-term political and security reforms.



ETHIOPIA

Work has begun on East Africa's largest railway training facility in Ethiopia, led by the national railway corporation.

The project aims to strengthen the country's ambition to become the region's rail hub by enhancing technical skills, operational capacity and long-term transport integration.



SOUTH SUDAN

President Salva Kiir dismissed petroleum undersecretary Deng Lual Wol and reinstated Chol Thon Abel, marking the fourth swap between the two officials in less than two months.

The repeated reshuffles highlight persistent instability within the ministry during a period of rising operational and governance pressures in the oil sector.



Key Updates

South Sudan secured \$50 million from the Green Climate Fund for a climate-adaptation project focused on water management, sustainable agriculture and disaster-risk reduction in flood-prone regions, representing a significant investment in resilience-building amid mounting environmental vulnerabilities.

MOROCCO



Spain and Morocco highlighted the strategic importance of their bilateral partnership during an economic meeting in Madrid, with Morocco's prime minister describing the relationship as a key bridge between Africa and Europe.

In parallel, Morocco deepened defence ties with the United States after Washington awarded a \$303.6 million FMS contract to Northrop Grumman for F-16 radar repair and support, *naming Morocco as the sole African beneficiary*.

The Royal Moroccan Air Force also ordered ten Airbus H225M Caracal helicopters to replace ageing SA330 Pumas and enhance search-and-rescue and air-mobility capabilities, with the deal including long-term sustainment support for the country's C-130 fleet.

Morocco secured a \$420 million agreement with Japan to upgrade irrigation systems, strengthen water management and support agricultural production, part of national efforts to counter worsening drought, bolster rural resilience and improve long-term food security.

Authorities also announced plans to meet 60% of Morocco's drinking-water needs through desalination by 2030—up from 25% today—with renewable-powered plant tenders set to launch next year as the country confronts prolonged drought conditions.

The African Development Bank approved a €450 million partial credit guarantee to help OCP raise up to €530 million for its 2023–2030 green investment programme, funding projects to cut emissions, expand renewables and improve water and soil sustainability.

Finally, Morocco is preparing to launch a long-awaited tender for the country's first LNG regasification plant on the Mediterranean coast, which will supply existing and future gas-fired power stations and support national energy-security objectives.

THE GOVERNMENT ADDITIONALLY COMMITTED \$7.8 BILLION TO BUILD A CLEAN, MULT-IMODAL PUBLIC-TRANSPORT SYSTEM BY 2029, AIMING TO MODERNISE URBAN MOBILITY, CUT EMISSIONS AND EXPAND MASS-TRANSIT LINKS ACROSS MAJOR CITIES.

NIGERIA

Nigeria launched major energy-sector initiatives, opening bidding for 50 oil and gas blocks aimed at unlocking 2 billion barrels in new reserves, attracting \$10 billion in investment, and adding up to 400,000 barrels per day to national output.

A parallel announcement opened 50 blocks with the same investment target, reinforcing Nigeria's push to revive upstream activity and strengthen long-term energy prospects. The country also completed the \$5 billion headquarters of the African Energy Bank, setting the stage for large-scale capital mobilisation for continental energy projects and boosting Africa's financial autonomy.

The Dangote Refinery secured a 1.5-billion-litre monthly petrol supply plan to stabilise national

availability through early 2026, advancing the goal of ending fuel imports.

New data showed fuel imports falling as domestic refining and gas-processing capacity expanded, supported by growing clean-transport investment and broader energy-security reforms.

Nigeria will additionally receive its first locally owned offshore storage unit with a one-million-barrel capacity, strengthening crude-handling independence and supporting upstream expansion. Poor port infrastructure, however, continues to cause major revenue losses as shippers divert traffic to Ghana, Togo and Benin due to congestion and outdated facilities.

The cabinet approved a fiscal plan projecting a 2026 budget of roug-

hly 54.5 trillion naira (\$37.7 billion), including a 20.1 trillion naira deficit and debt-service costs of 15.9 trillion naira. The national content board launched a \$100 million equity fund to expand local participation in the energy sector, saying compliance rules will tighten next year.

Nigerian GDP grew 3.98% in Q3—slowing from 4.23% in Q2—as inflation and tight monetary policy weighed on activity, though services, agriculture and higher oil output supported overall growth. The NNPC—Heirs Energies joint venture revived an onshore gas well in OML 17, boosting Niger Delta power generation and improving local energy supply.





BURKINA FASO

West African Resources submitted an alternative proposal after the government sought an additional 35% stake in the planned 220,000-oz/yr Kiaka mine.

The revised plan increases national participation and state revenue without further equity transfer, while operations at Sanbrado and Kiaka continue uninterrupted and the company's production targets remain unchanged.

NIGER

The military government escalated its confrontation with France's Orano, accusing the company of predatory behaviour and environmental crimes after officials found 400 barrels of radioactive material near Madaouela.

Authorities warned that Orano could face criminal proceedings as tensions over uranium governance intensify. Orano separately issued warnings that a recent uranium shipment from the expropriated SOMAIR mine posed major safety and security risks, citing possible diversion of radioactive material and violations of international transport standards.

Niger's junta moved decisively to end France's decades-long dominance in the uranium sector by directing output from the Somaïr mine straight to the global market rather than through Orano.

The decision represents the country's sharpest resource-policy shift since the takeover, aiming to reclaim sovereign control and capture full export value.

Officials further signalled greater autonomy by announcing plans to sell uranium directly on the international market, describing the strategy as a reassertion of national ownership over Niger's strategic nuclear assets.

MALI

Mali recovered approximately 761 billion CFA francs (\$1.2 billion) in unpaid dues from mining firms following a sector-wide audit under the new mining code. Authorities reported the recovery strengthens fiscal oversight in a sector critical to exports and macroeconomic stability, with the government stating the new framework could add 586 billion CFA francs in annual revenue.

Barrick Mining reached a 244 billion CFA francs (\$430 million) settlement with the government to resolve disputes linked to its gold mines, lifting provisional administration at Loulo-Gounkoto and restoring full operational control as Mali drops all charges and moves to release detained employees.

Mali also made its first lithium export from the Bougouni mine—28,950 tonnes of 5.39% Li₂O spodumene concentrate worth about \$24 million—marking the country's formal entry into the global lithium market.



GHANA

Regionally, traders expect a mixed week for African currencies: Nigeria, Ghana and Kenya are likely to remain steady against the dollar, Uganda's shilling may strengthen, and Zambia's currency could face renewed pressure.

Ghana announced plans to begin construction of its first nuclear power plant in 2027 on a dual-site layout, marking a major shift in its long-term energy strategy and signalling the country's entry into Africa's expanding nuclear-energy landscape.

The government also moved to take control of a major offshore block estimated to hold 1.5 billion barrels of oil, aiming to increase national oversight of one of its most valuable undeveloped deepwater assets.

In the mining sector, Hamak Strategy signed a binding term sheet for exclusive rights to acquire the Akoko gold licence—holding over 250,000 oz of defined gold—at an implied valuation of roughly \$8-\$10 per contained ounce.

Meanwhile, inflation eased for the 11th consecutive month, dropping to 6.3% in November from 8% in October, driven primarily by lower food inflation.



KENYA

Kenya will appeal a regional court ruling that suspended its trade deal with the EU, with Trade Minister Lee Kinyanjui warning the judgment threatens \$1.56 billion in annual exports and risks undermining key European market access.

Nairobi is also fighting to retain its seat on the IMO Council as Nigeria and South Africa mount strong competing bids, turning the race into a major diplomatic test for maritime influence.

The United States expanded its health cooperation with Kenya through two major agreements: a five-year deal granting over \$1.6 billion under the Trump administration's "America First" global health plan, and a separate \$2.5 billion agreement replacing dismantled USAID health programs, signalling a broad restructuring of U.S. assistance frameworks.

Kenya turned to China for financing a \$1.5 billion highway project after a U.S. funding setback, allowing the country to advance one of its largest road developments in recent years and highlighting Beijing's renewed infrastructural influence in East Africa.

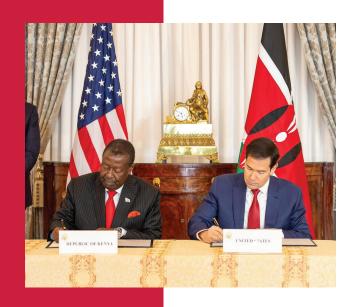
Economic pressures remain high, with public debt surpassing 68% of GDP—placing the country at risk of distress according to the World Bank—as repayment costs climb and revenue performance weakens.

The government agreed to sell a 15% stake in Safaricom to Vodacom for approximately \$1.6 billion, giving the buyer a controlling share pending regulatory and parliamentary approval. The finance minister said proceeds will serve as seed capital for infrastructure investment and Kenya's sovereign wealth funds.

Regionally, Kenyan industrialist Narendra Raval opened a \$550 million steel plant in Tororo, Uganda—his first major venture outside Kenya—expanding East Africa's steel-production capacity and strengthening the wider manufacturing value chain.

Key Updates

Kenya's challenge to the suspended EU trade deal underscores both its reliance on export markets and its exposure to shifting external conditions. Its IMO bid and reworked U.S. health partnerships highlight a broader effort to safeguard—and recalibrate—its international standing.



MOZAMBIQUE

Swiss prosecutors charged Credit Suisse with failing to prevent money laundering tied to loans issued for Mozambique's tuna-fishing fleet, a scheme that triggered a major debt scandal involving illicit payments, weak compliance controls and financial misconduct linked to the controversial borrowing program.

In the LNG sector, TotalEnergies announced that partners in the \$20 billion Mozambique LNG project will inject additional equity to replace financing previously provided by UK and Dutch export credit agencies, which together accounted for around 10% of the project's original \$15.4 billion external funding.

GUINEA-BISSAU

Guinea recorded a historic economic milestone as the long-delayed Simandou iron-ore megaproject finally shipped its first cargo to China.

The \$23-24 billion complex, home to the world's largest undeveloped high-grade deposit, officially launched after years of suspension, policy resets and new rail-port infrastructure, positioning Guinea as a major supply challenger to Australia while reinforcing China's long-term strategic mineral influence.





DR CONGO

Ivanhoe Mines began heating its 500,000-tpa direct-to-blister copper smelter at the Kamoa-Kakula complex—described as Africa's largest and most efficient—marking a major step toward on-site processing that will reduce reliance on external smelters and support rapid expansion at the high-grade copper operation.

First concentrate feed is expected before yearend, reinforcing the DRC's position as a central player in global copper supply chains.

UGANDA

Uganda announced one of its largest energy breakthroughs in a decade after the state oil company identified nine promising wells and a 600-million-barrel crude discovery in the Kasuruban block, potentially expanding resources across the Albertine Rift.

The petroleum regulator said recoverable oil reserves have risen to 1.65 billion barrels, up from 1.4 billion, strengthening the country's position as Africa's newest emerging energy hub.

Progress continued on the \$5 billion East African Crude Oil Pipeline, which has reached 75% completion, marking a major step toward Uganda's first oil exports and moving the long-delayed project closer to operation after years of political and logistical hurdles.

TANZANIA

Tanzania confirmed that construction of its long-delayed \$10 billion port project will begin in December after a decade of stalled negotiations.

The launch signals a major shift in national infrastructure strategy and aims to position the country as a leading maritime hub in East Africa.



Gulf influence clusters in key zones: strong presence in the Horn, major UAE–Saudi capital in North Africa, rising mining interest in West Africa, and security-driven investments along the Red Sea corridor.

GCC Footprint

- GCC investments exceed
 100 billion USD in Africa.
- GCC-Africa FDI pledges reached 113 billion USD (2022-25).
- Africa-Gulf trade increased 30% in 2024.
 Shift from aid toward ports, energy, logistics

Sector Breakdown

60% of

GCC activity is into edu infrastructure/logistics. training.

15% directed to humanitarian and financial aid.

25% flows

into education, religion, training.

Energy-transition investments grow double digits yearly.

□ UAE

- UAE invested 59.4 billion USD across Africa.
- DP World manages 10+ major African ports.
- UAE-Africa trade nears 100 billion USD yearly.
- Masdar leads multi-billion solar projects continent-wide.

Qatar

- Qatar's total Africa investment is ~7.2 billion USD.
- Doha strengthens LNG and energy ties.
- Rwanda airport stake valued at 1.3 billion USD.
- Qatar maintains a limited but focused Africa footprint.

Saudi Arabia

- Saudi development funding exceeds 10 billion USD.
- KSA expands farming in Sudan-Ethiopia corridor.
- Vision 2030 boosts African mining partnerships.
- Saudi capital targets energy and logistics routes.

CLASH

SOUTH AFRICA

A proposed overhaul of South Africa's financial system could unlock up to 5 trillion rand (\$293 billion) for infrastructure and clean-energy projects, complementing the National Development Plan's target of 4.8 trillion rand in public-private infrastructure funding by 2030.

France approved a €300 million loan for Transnet to support clean-energy upgrades and ease freight and port bottlenecks as logistics constraints continue to weigh on economic performance.

Corporate expansion accelerated across multiple sectors. Pepkor gained approval to acquire a fintech platform and enter the banking space, expanding its footprint in South Africa's consumer economy.

Naspers intensified its global expansion strategy by increasing investments in Europe, Latin America and India. Ralph Lauren Corporation acquired full ownership of South Africa's iconic Polo brand, consolidating the label under the American fashion house. Vodacom agreed to acquire control of East Africa's largest telecom operator, Safaricom, in a \$2.1 billion deal.

Significant mining and energy developments also unfolded. Billionaire Robert Friedland opened the first phase of a \$2 billion platinum-group metals mine—nearly 40 years in development—adding major new capacity to one of the world's key PGM hubs.

Exxaro acquired majority stakes in two renewable-energy plants in a R1.8 billion deal, almost doubling Cennergi's operating capacity and accelerating its transition beyond coal. Pan African Resources began assessing a R2.8 billion expansion of its Mintails tailings operations to boost annual output to nearly 100,000 oz. Sibanye-Stillwater concluded a three-year wage agreement across its gold operations.

Harmony Gold—through South Africa—Australia cooperation—committed up to \$1.75 billion to develop Australia's Eva Copper project, diversifying the miner into the copper market. *Coal export volumes remained flat at a projected 56.4 Mt for 2025, slightly below last year's 56.9 Mt, as logistical constraints limit growth.*

Transport and logistics investment surged as Traxtion announced a 3.4-billion-rand (\$199 million) programme to purchase new locomotives and wagons, preparing to operate freight services on national mainlines newly opened to private operators.

Armscor named Milkor as the preferred supplier of new APCs for the SANDF after a contested procurement process, *stating that the Bushcat MRAP selection followed transparent procedures.*



NAMIBIA

Namibia's Health Ministry announced plans to hire more than 2,000 staff—1,713 clinical and 337 non-clinical workers—to ease overcrowding in public facilities and improve nationwide service delivery.

The expansion aims to address long-standing personnel shortages and strengthen capacity across the national health system.

China handed over a satellite ground-data receiving station to Namibia, significantly enhancing national remote-sensing capability, strengthening the country's technological infrastructure and deepening its fast-growing aerospace partnership with Beijing.

In the infrastructure and development sphere, the African Development Bank plans to provide approximately \$1.78 billion in financing for transport, energy and water projects under its 2025–2030 country strategy. Namibia also advanced its renewable-energy transition as state utility NamPower issued tenders for six large solar IPPs and a major battery-storage project to expand on-grid capacity.



SENEGAL

The IMF said significant progress is being made toward a new loan programme while probing hidden liabilities that contributed to Senegal's severe debt distress. Bank of America warned that an external debt restructuring is increasingly likely by late 2026 as Dakar grapples with billions in undisclosed obligations and remains in extended discussions with the Fund.

Meanwhile, lawmakers announced that the Ministry of Trade and Industry's 2026 budget will triple to approximately \$569.5 million, marking a major expansion of sectoral funding.

ANGOLA

President João Lourenço inaugurated Angola's first non-associated gas project with the launch of the \$4 billion New Gas Consortium processing plant in Soyo, marking a major milestone in diversifying the energy sector beyond crude.

The facility strengthens domestic gas supply, enhances energy security and advances Angola's long-term monetisation strategy. In parallel, the government reached an agreement in principle with JPMorgan to roll over a \$1 billion loan due at year-end, easing short-term repayment pressure and supporting broader debt-management and fiscal-stability efforts.

ZIMBABWE

Sudan, Zimbabwe and Burundi ranked among the countries losing the most purchasing power in 2025, with surging inflation sharply eroding household incomes and weakening consumer affordability across all three economies. The deterioration reflects broader macroeconomic instability and persistent cost-of-living pressures.

Zimbabwe plans to raise gold royalties under its 2026 budget to capture more revenue from record bullion prices, aiming to bolster fiscal buffers as global demand for precious metals climbs.

Authorities also intend to phase out the US dollar and transition to a single national currency by 2030, focusing on building FX reserves and stabilising monetary conditions to support a full exit from dollarisation.

The government announced a strict new mining policy that will revoke licences from operators failing to meet environmental standards, signalling one of the country's toughest enforcement regimes and a major shift toward tighter sector oversight.

Zimbabwe additionally forecasts economic growth to slow to around 5% in 2026 due to global headwinds, after estimating 6.6% growth this year driven by post-drought recovery in agriculture and mining.



ZAMBIA

A Chinese premier will visit Zambia for the first time in 28 years as the country emerges from a severe financial crisis, signalling renewed Chinese diplomatic engagement and strategic interest in Lusaka's recovery. The visit underscores Beijing's intent to deepen ties across governance, infrastructure and long-term economic cooperation.

Zambia is attracting fresh investment attention as Galileo Resources began drilling at the Molefe copper project after signing a conditional cooperation and development agreement with Jubilee Metals on November 27, strengthening activity in one of the country's key mineral belts.

The government also launched a \$1.6 billion national programme to expand electricity access for 1.6 million people and provide clean-cooking solutions to 300,000 households over five years, marking a major step toward inclusive energy development.

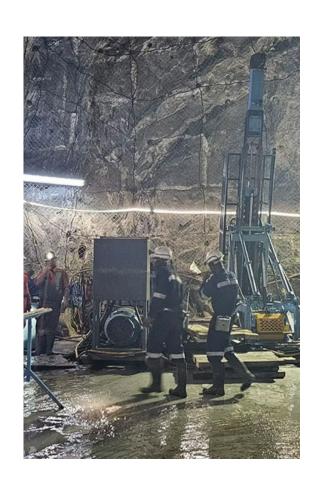


BOTSWANA

NexMetals obtained full ownership of the Selebi and Selkirk copper-nickel-cobalt-PGE assets after completing a \$25 million milestone payment to BCL's liquidator, granting the company unrestricted control of the projects.

Lucara awarded the final major contract for the Karowe Underground Project to Group R Mining, covering all lateral development from shafts to the orebody— including extraction levels, crushing chambers, ore bins, pump stations and associated underground infrastructure.

Recruitment will begin in early 2026, with lateral development scheduled to start mid-2026. Botswana's central bank kept its policy rate unchanged at 3.5% in its first decision under new governor Lesego Moseki, citing diamond-sector weakness, stable medium-term inflation expectations and an economy still operating below full capacity.



dashreport.com

CAMEROON

Cameroon expects its 2026 budget deficit to more than double as the government ramps up spending to support economic activity amid global instability. Officials warned that external shocks remain significant due to the country's heavy reliance on imported fuel, wheat and vehicles, adding to concerns over fiscal pressure and debt sustainability.

Meanwhile, forty-one African central bank governors met in Yaoundé to revive plans for deeper monetary integration under the African Monetary Institute, envisioned as a key step toward establishing a single African central bank by 2026.



RWANDA

Rwanda ratified a defence agreement with Türkiye to establish a weapons, drones and military-equipment manufacturing plant in Kigali, a move aimed at reducing reliance on imports and accelerating the development of a self-sufficient national defence industry.

Rwanda and Qatar strengthened their strategic partnership as the \$2 billion Bugesera Airport project regained momentum during the Emir of Qatar's visit to Kigali. The talks expanded cooperation across aviation and infrastructure, reaffirming Qatar's role in supporting Rwanda's long-term transport and economic ambitions.

CÔTE D'IVOIRE

Côte d'Ivoire outlined ambitions to become one of Africa's top five oil economies by 2035, driven by recent offshore discoveries and expanded exploration that aim to diversify revenues beyond cocoa and strengthen long-term energy security.

In the mining sector, Barrick finalised the sale of the Tongon gold mine and associated exploration assets to the Atlantic Group in a deal worth up to \$305 million. Authorities also approved four solar PV concessions totalling more than 200 MW, advancing efforts to broaden the country's on-grid renewable power mix.

AFRICA-WIDE DEVELOPMENTS



Fintech firms Optasia and Cash Plus launched the region's first post-pandemic IPOs, with Optasia raising \$345 million at a \$1.4 billion valuation in Johannesburg and Cash Plus securing \$82.5 million at a \$550 million valuation in Casablanca—signalling renewed investor confidence as startups reached \$2.8 billion in 2025 funding.

The European Investment Bank announced more than €2 billion in renewable-energy commitments over the next two years to support grid upgrades, solar expansion and wider access to clean power across Africa. peakers at a critical-minerals webinar warned that rising global demand will not translate into African gains without stronger partnerships, infrastructure upgrades and regulatory certainty, stressing that expanding value-added processing is vital for capturing long-term economic benefits.

Prada completed a \$1.38 billion deal to take full control of Versace, consolidating two major luxury houses under one group and intensifying competition among Europe's leading fashion powerhouses.

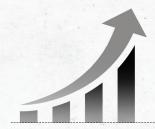
Beijing launched a green-minerals cooperation drive to reinforce its dominance in rare earths and other transition-critical materials, deepening African partnerships central to its global supply-chain strategy. Egypt announced a new offshore oil discovery in the Gulf of Suez expected to add roughly 3,000 barrels per day to national output, strengthening its position as North Africa's third-largest producer.

The UAE unveiled a \$1 billion plan to expand AI infrastructure and services across Africa, targeting data-centre investment, digital governance and broad AI adoption to accelerate development and deepen its technological footprint on the continent.

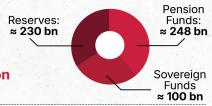
AFRICA'S STATE-OWNED ASSETS SURPASS THE USD 1 TRILLION MARK

Africa's state-controlled portfolios have crossed the USD 1 trillion threshold, driven by rapid growth in reserves, pension funds, and newly established sovereign wealth funds.

VERIFIED FIGURES



USD 1,000 billion (end of 2025) Measurable Total: Reserves + Pensions + Funds USD 600 billion



Continent's Largest Portfolio:
≈ USD 68 Billion

Share of Global Sovereign Assets: ≈ 1%

DEVELOPMENTS IN 2025





Average Target Size (New Funds): **USD 1–5 Billion**



Annual Asset Increase USD 40-60 Billion



Growth of total portfolios in 2020-2025: **35-40%**

CONTINENTAL COMPARISON

