TELLURIAN RESEARCH

DRC Intelligence Weekly

10 – 16 nov. 2026

Democratic Republic of the Congo · Open-source intelligence · Information cutoff: 16 November 2026

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01

Executive Summary

Priority developments, the week in sequence and the situation map

1.1 Situation Map — Week’s Events

Copper $13,610/t ▼ -2.47%	Cobalt $33,525/t	Tin $48,295/t ▲ +4.25%
Gold $3,886.30/oz ▼ -4.63%	Brent $95.84/bbl ▼ -2.52%	CDF per USD 2,260.96 → 0.00%

Week-on-week: Fri 6 Nov close to Fri 13 Nov close. Copper and tin: LME cash settlements (Westmetall). Gold: COMEX December 2026 settlement; Brent: ICE January 2027 settlement, from US market close reports. Cobalt: indicative quotation, 12 Nov. CDF/USD: BCC rate, 2,261.00 on 6 Nov and 2,260.96 on 13 Nov. A lower number means the CDF has strengthened.

01 Executive Summary

WEEK AT A GLANCE

Kinshasa gained ground on paper this week and lost it on the ground. At home, Tshisekedi **promulgated Law 26/045**, which opens a legal route to an **entirely new constitution**, and with it a possible third term. Abroad, the **UN extended sanctions to Kabila's FRN** and Kinshasa took its fight with Kigali to the **Francophonie**, where the leadership vote was postponed for a year. In the east, the **FRN pressed on several South Kivu axes** after displacing **323,000 people** in four days, and the **ADF killed at least 44 civilians** in Mambasa, inside an Ebola zone where the response is failing on pay, access, and security. **The bottom line: Kinshasa's legal and diplomatic gains matter only if they slow the war and reopen access; this week they did neither.**

NGOS Less access, two fronts
- RN3 and Mambasa access worsening
- Ebola tracing gaps widen in North Kivu

MINING Exposure moves closer
- The RN3 front edges towards Bisie
- Copper −2.47%, tin +4.25% on the week

INVESTORS Two risks now overlap
- Constitutional risk joins conflict risk
- FRN sanctions untested in practice

1 A route to a new constitution opens, raising third-term fears

POLITICS

Tshisekedi promulgated **Law 26/045** on **9 November**, replacing the 2005 law on how referendums are organised. In cases of "absolute necessity", the law allows a vote on an **entirely new constitution**, according to Reuters and Africanews. Because Article 220 bars any revision of term limits, a new constitution rather than an amendment is the route critics fear could deliver a third term. The **C64** opposition vowed to resist the changes, and the FRN had already warned that constitutional change would collapse the Doha process. For investors, constitutional risk to the **2028 elections** now runs alongside conflict risk; the next test is the first formal referendum proposal.

The third-term question has moved from rhetoric to procedure.

2 The FRN widens its offensive as the ADF strikes Ituri

SECURITY

The FRN offensive in South Kivu widened during the week. After taking Bulambika and Bunyakiri on 7–8 November, FRN forces pushed north-west along the RN3 and clashed with the army at **Ebisha** on 11–12 November, on the road to Hombo and Walikale. Further south, fighting resumed from 11 November on the **Kaziba–Rurambo axis**, which leads towards the **Uvira plateaus**. The offensive had already displaced **more than 323,000 people** in Kalehe and Kabare over 6–9 November. Separately, in Ituri, **ADF attacks in Mambasa killed at least 44 civilians** on 9–12 November. Most claims of territorial gain come from one side. The next tests are whether the FRN advances beyond Ebisha towards Walikale, where the Bisie tin mine is located, or towards Uvira, which would draw in Burundi.

The FRN is pressing on more axes than the army has shown it can hold.

01 Executive Summary (continued)

3 Sanctions reach the FRN as Kinshasa takes on Kigali at the OIF

DIPLOMACY

On **11 November** the UN sanctions committee added the **FRN to its sanctions list as another name for the AFC** (press release SC/16506), so Kabila's coalition now falls under the AFC's existing **asset freeze**. The UK applied the same listing on 12 November, and France welcomed the decision on 14 November. At the Francophonie summit in Phnom Penh, Kinshasa offered to withdraw its own candidate, **Juliana Lumumba**, and backed Romania's **Dacian Cioloș** to block a third term for Rwanda's **Louise Mushikiwabo**. On **16 November** the vote was **postponed for 12 months**, with Mushikiwabo staying in post meanwhile. Kinshasa and Kigali are due to hold talks in Switzerland on **19 November**, and MONUSCO's mandate expires on **20 December**.

Kinshasa is isolating Kigali in every forum; enforcement and the 19 November talks will show whether that changes Rwanda's conduct.

4 Ebola at six months: the response is failing on several fronts

PUBLIC HEALTH

Confirmed cases reached **11,376** and deaths **5,568** by 14 November, about **64 new cases a day** since 5 November, and on 15 November Africa CDC said the outbreak was "still not under control". The UN's Ebola coordinator said ADF violence had recently killed more people each day than the virus, and more than **1,000 people** under Ebola follow-up were lost after an ADF raid on Cantine-Aloya on 5–6 November. MSF said **two in three** reported deaths over the past month occurred outside treatment centres, and response workers in **Butembo** went on strike over pay on 12 November. With no licensed vaccine against Bundibugyo virus, NGOs and companies in Beni, Butembo and Lubero should plan for disruption well into 2027; the first test is whether the contacts lost at Cantine-Aloya are traced before new cases appear.

The response is failing on pay, management and access, not only on security.

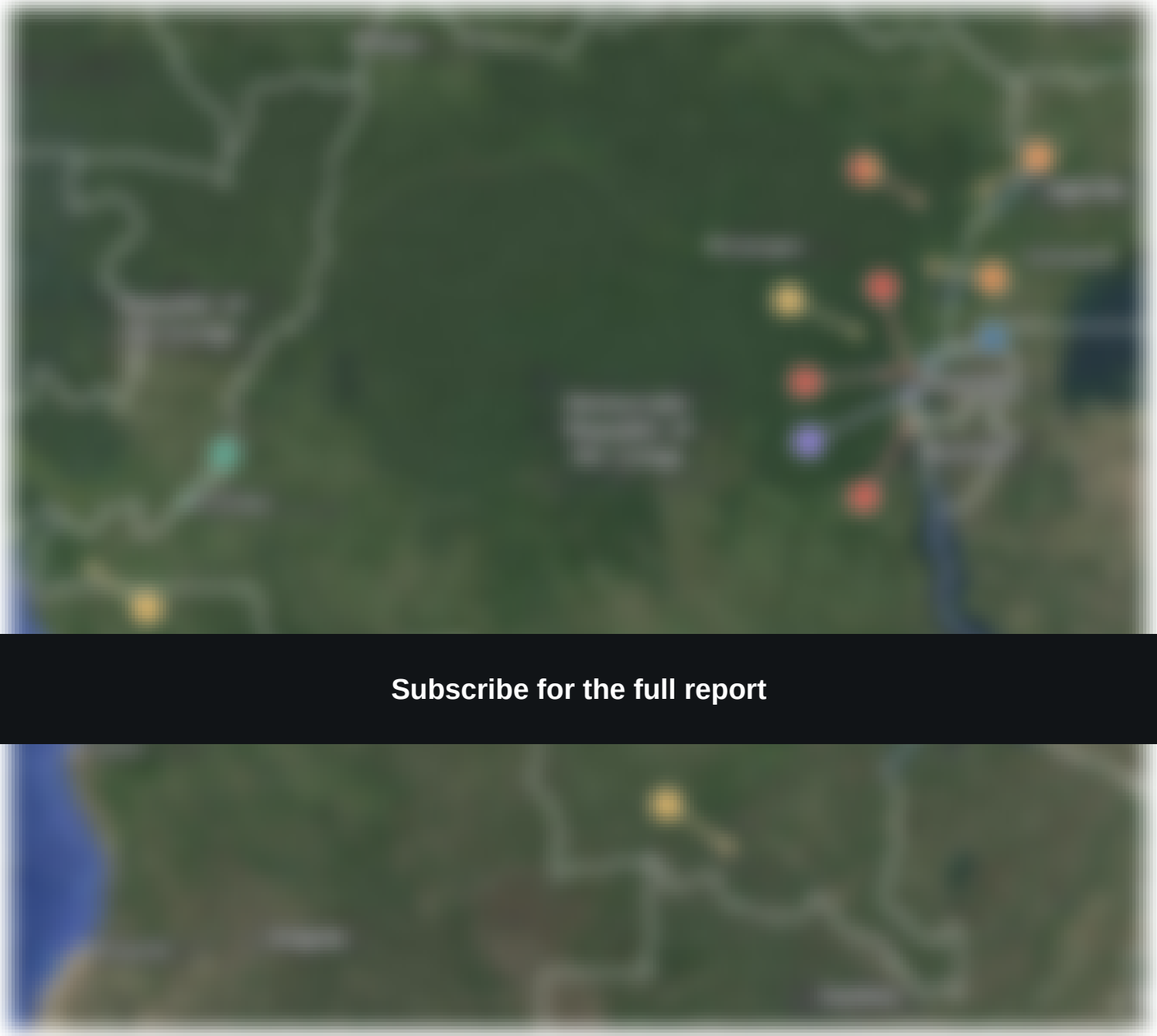
5 A US tin deal now sits near the front line

MINING

Alphamin agreed on 9 November to sell up to **3,600 tonnes a year** of contained tin from its **Bisie** mine in Walikale, for an initial two years, to a Pentagon-backed smelter under construction in Virginia. The deal ties a US supply chain to an area the FRN is approaching along the RN3. Prices moved in opposite directions: LME tin rose **4.25%** on the week, while copper, the DRC's main export, fell **2.47%** to **$13,610 a tonne**, adding pressure on revenue for a proposed 2027 budget of about $24.8 billion. The National Assembly also declared the **Grand Inga** hydropower bill admissible and opened an inquiry into copperbelt mining. Tin buyers should watch the RN3 and access around Walikale; copperbelt operators should prepare for parliamentary scrutiny.

US supply-chain policy now has a direct stake in a conflict-exposed mine.

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Analysis

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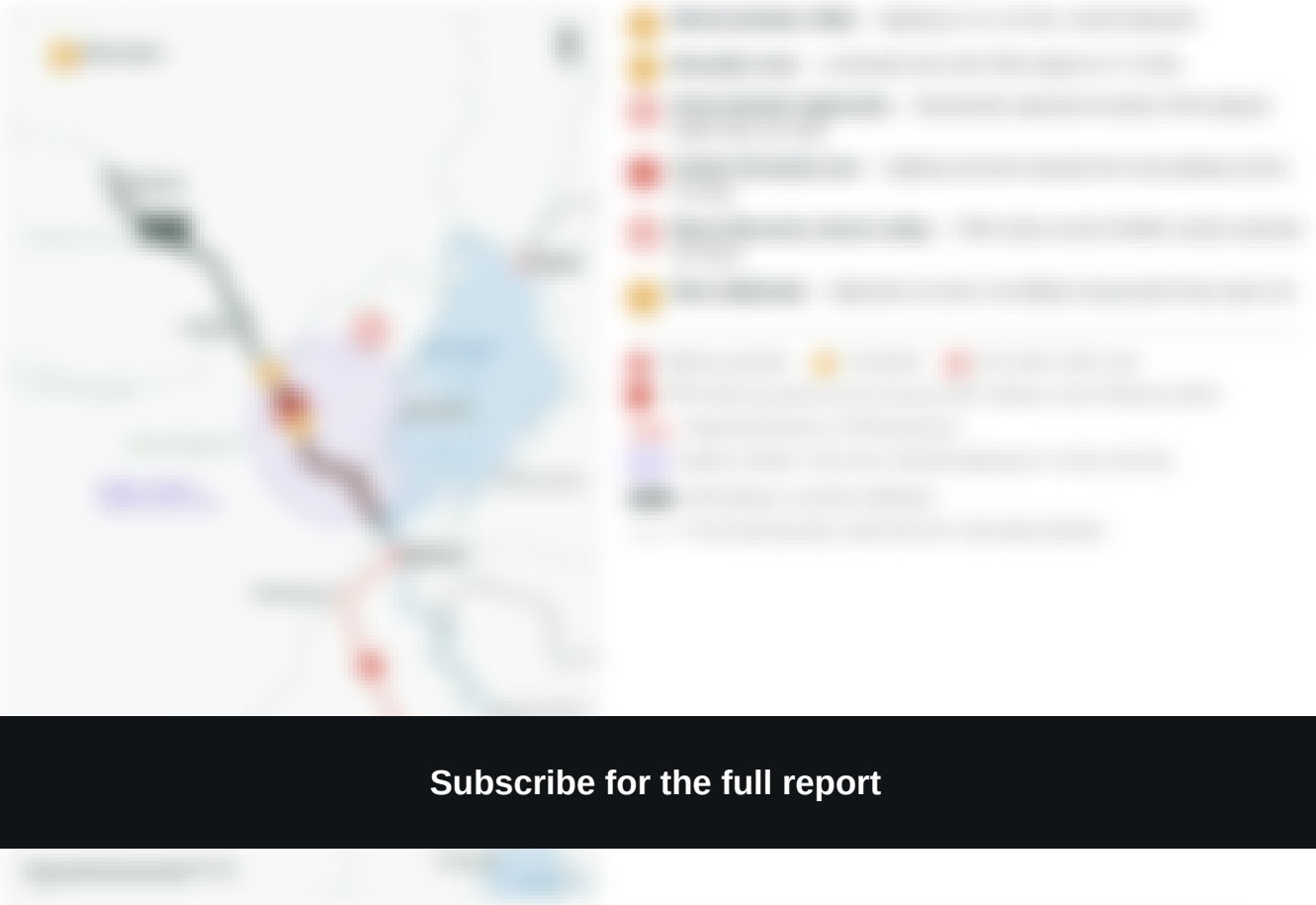


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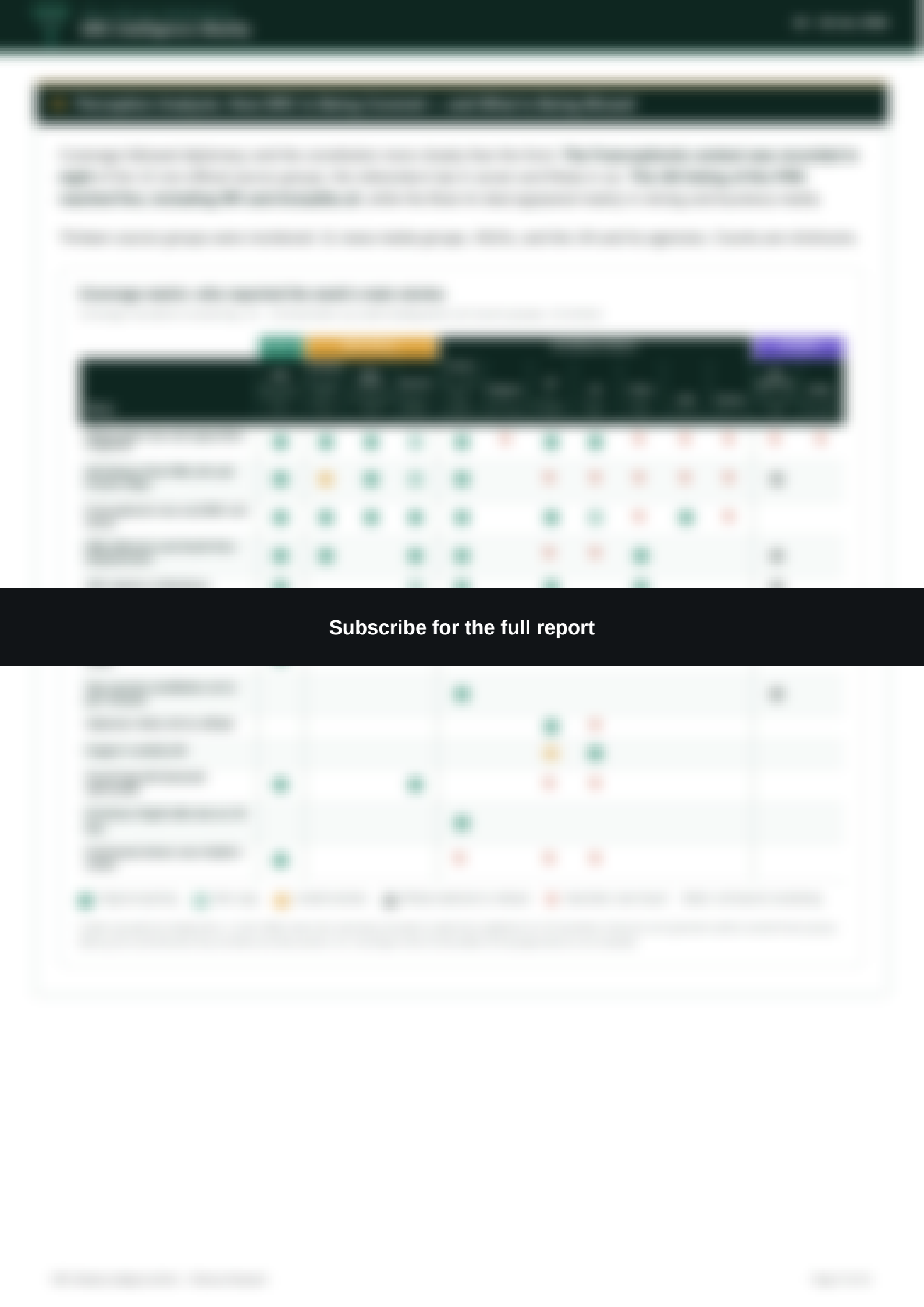
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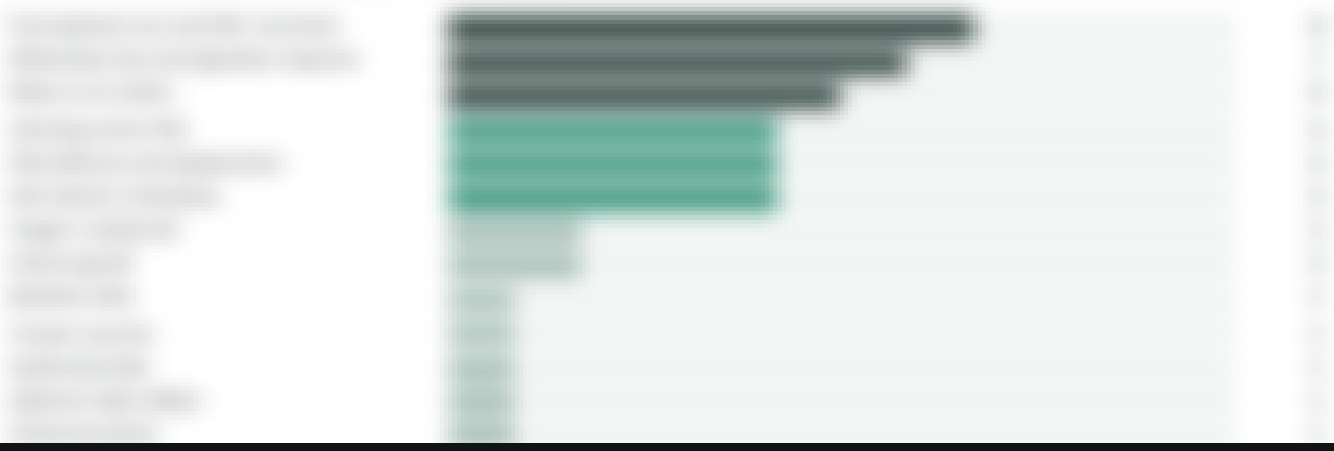
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Perception

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[illegible] The Language and Geography of Coverage



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[illegible] International Wires and Western Media: Reuters, Bloomberg, AP, the BBC, AFP, France 24 and La Monde

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[illegible] Evangelical Democratic Media: Radio Magg, Annapolis and Trail Call

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