



FOCAC INTELLIGENCE

Series note | September 2026

FOCAC Intelligence: Africa Country Series

What the series is, how it is built, which countries it covers, and how it will grow towards the 2027 FOCAC Ministerial Conference.

AT A GLANCE

5

Country volumes at launch

2

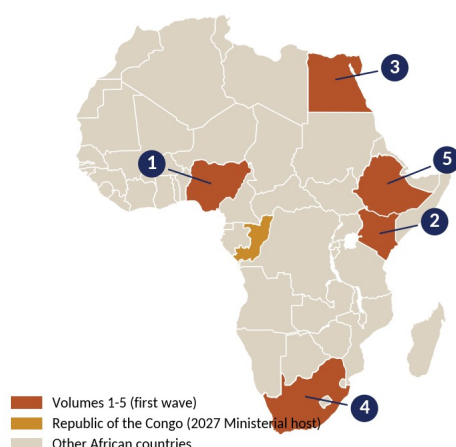
Languages: English and French

34

Countries in the internal Delivery Monitor

5 Oct 2026

Launch date



Publisher: Policy Delivery International Limited (PDIL)

Technical team: Dr. Henry Anibe Agbonika, Adejumobi Fashola, Dr. Tokunbo Alaga Olorundami, Tijesunimi Falade, Mbotidem Jackson

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Policy Delivery International Limited (PDIL)

policydelivery.africa | info@policydelivery.africa | +2348156527286 | Ventures Park, 5 Kwaji Close, Maitama, Abuja, Nigeria

SECTION 1

Why a series

Commitments are continental; delivery is bilateral

The 2024 Beijing Summit made commitments to Africa as a whole: ten partnership actions, RMB360 billion in financial support, and zero-tariff access for Africa's least developed countries, which China extended in June 2025 to all 53 African partners with effect from 1 May 2026. Delivery, however, happens country by country, through bilateral agreements, grants, loans, protocols and projects.

A single country brief can say whether a record is real. Only a series can say whether the cycle is delivering for Africa, who is receiving what, and why some countries convert commitments faster than others. That comparison is the core value of FOCAC Intelligence, and it is what governments, development partners and investors need ahead of the 10th FOCAC Ministerial Conference in the Republic of the Congo in 2027.

SECTION 2

The first five volumes

Chosen for economic weight, exposure to Chinese finance and trade, regional anchor role and relevance to PDIL's clients

Volume	Country	Region	Why it is in the first wave
1	Nigeria	West Africa	Africa's largest population and a leading economy; zero tariffs in force, framework signed, no early harvest yet; ECOWAS anchor
2	Kenya	East Africa	The clearest case of the full trade sequence: early harvest arrangement signed and in force; SGR extension; EAC anchor
3	Egypt	North Africa	SCZone manufacturing investment signed at the Summit; 70th-anniversary state visit; gateway between Africa, the Middle East and Europe
4	South Africa	Southern Africa	China's largest African trading partner; framework signed, early harvest awaiting SACU; BRICS and G20 context
5	Ethiopia	Horn of Africa	An LDC with zero tariffs since December 2024; debt treatment with China as co-chair; seat of the African Union

SECTION 3

One method across every volume

What makes the volumes comparable

Every volume applies the same test to every record. Delivery stage is separated from attribution: an activity can be real and operational without being new FOCAC delivery.

- **Delivery stage:** an eight-stage ladder from announcement to verified results. An agreement is not implementation, financing is not disbursement, and a completed asset is not a result.
- **Attribution:** A1 direct 2024 FOCAC delivery, A2 plausibly attributable, A3 post-summit bilateral, A4 pre-existing, A5 disputed or unverified.
- **Evidence grade:** A (independently corroborated) to D (insufficient). Every record carries its sources.

- **Trade instruments:** every volume reports the same three instruments: China's zero-tariff treatment, the framework agreement on economic partnership, and the early harvest arrangement, with the April 2028 deadline for non-LDCs.

All records sit in the FOCAC 2024-2027 Delivery Monitor, the internal evidence base behind the series, which covers 34 countries and 135 named projects. The Monitor is in pilot from 5 October 2026; a public extract (version 1.0) will follow after the pilot.

SECTION 4

Editions and languages

Edition	Audience	Access
Public (English and French)	Governments, parliaments, development partners, researchers, media	Free at policydelivery.africa
Executive	Boards, investors, banks and corporate strategy teams	On request; country deal trackers and briefings
Restricted	Government negotiating teams	By arrangement only; never published

The Africa Country Series is published in English and French from launch, so that francophone governments and institutions, including the 2027 Ministerial host, can use it in their own working language.

SECTION 5

Growth path

From five volumes to a continental delivery report and index

When	What
5 October 2026	Launch of Volumes 1 to 5 (English and French), with the Trade Series
After the pilot	Public extract of the Delivery Monitor (version 1.0)
Quarter 4 2026	Wave 2 volumes; quarterly refresh of the first five
Quarter 1 2027	FOCAC Delivery Report 2027: continental scorecard across the 29 commitments and all completed country volumes
2027	10th FOCAC Ministerial Conference, Republic of the Congo; FOCAC Delivery Index live at policydelivery.africa

Wave 2 candidates, to be confirmed: Ghana (research already completed), the Republic of the Congo (2027 host), the Democratic Republic of the Congo (critical minerals), Côte d'Ivoire and Senegal (francophone West Africa), and Angola.

SECTION 6

How to use and cite the series

Cite a volume as: Policy Delivery International Limited (2026). FOCAC Intelligence Africa Country Series, Volume N: Country, version. Abuja: PDIL. policydelivery.africa. Corrections are made within five working days. Evidence on any record is welcome at info@policydelivery.africa.



About Policy Delivery International Limited

Policy Delivery International Limited (PDIL) is an Africa-focused governance strategy and institutional reform organisation, beginning from Nigeria. PDIL works with governments, development partners and institutions to connect strategy to execution: national and subnational planning, reform coordination, performance management, policy delivery and institutional strengthening.

PDIL knowledge products combine rigorous evidence with practical implementation guidance for senior policymakers. Its institutional newsletter is The Execution Brief, and FOCAC Intelligence is its policy intelligence initiative on China-Africa cooperation.

Contact

Policy Delivery International Limited

Ventures Park, 5 Kwaji Close, Maitama, Abuja, Nigeria

Web: policydelivery.africa

Email: info@policydelivery.africa

Phone: +2348156527286