

# SECRET STATECRAFT

## Energy and Economic Security Vulnerabilities

An interim alert on the Eskom diesel chain, foreign leverage over critical energy infrastructure, and the merger of old-order security networks with post-apartheid corruption in the KwaZulu-Natal–Gauteng nexus

National Security Series, Paper 2 (work in progress)

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百戰百勝，非善之善者也；不戰而屈人之兵，善之善者也。

*“To attain a hundred victories in a hundred battles is not the pinnacle of excellence; to subjugate the enemy’s army without fighting is the true pinnacle of excellence.”*

Sun-tzu (1994, p. 177, translated by Sawyer)

魚不可脫於淵，國之利器不可以示人。

Yú bùkě tuō yú yuān; guó zhī lìqì bùkě yǐ shì rén.

*The fish must not be allowed to leave the deep; The instruments of power in a state must not be revealed to anyone.*

LAOZI (1963, ch. 36, trans. LAU)

## Abstract

*This interim paper is an alert, not a finished risk profile. It opens with the report, carried by News24 on 20–21 August 2026, that Eskom paid hundreds of millions of rand for emergency diesel recorded as received but not physically present in tank, and it reads that episode as one symptom of a larger condition: the extreme exposure of South Africa's unsecured critical energy supply chain to the full repertoire of techniques crystallised in the first paper of this National Security Series, **ZAI: On Secret Statecraft and Novel Types of Threats, Vulnerabilities and Opportunities**. The paper traces the Ankerlig diesel chain backwards through Lanele Resources to Vesquin Trading, the Vitol group, the terminal company VTTI and Burgan Cape Terminal, and shows that the same state-trader-intermediary fault line between legal title, physical custody and promised future supply recurs in the 2015–16 Strategic Fuel Fund disposal, the 2018–19 PetroSA emergency purchases and the 2025 Eskom payments. It then sets that chain beside the evidence emerging from the Madlanga Commission on the KwaZulu-Natal-Gauteng nexus of senior police officers, private-security intermediaries, surveillance procurement and emergency vehicles, and beside the longer genealogy of the apartheid-era covert apparatus in Natal – the Security Branch and Vlakplaas, Military Intelligence and Operation Marion, the Civil Cooperation Bureau and Inkatha – whose personnel, methods and networks survived the transition through the new police service, the Scorpions and Crime Intelligence. The paper is explicit about what is documented, what is structurally parallel and what remains an investigative hypothesis. Its principal finding is that the energy chain is vulnerable to all ten Zai techniques, including techno-cognitive and foreign ambush, and that the SANDF, the intelligence services and the wider national-security community are presently unequipped to discover, detect, trace and anticipate threats of this kind. It closes with the investigative and doctrinal priorities required before the full study can be completed.*

## 1. Diesel that did not exist

The epigraph from LAOZI that opens this paper is read here in a precise sense. In the context of this paper, LAU's "instruments of power" are interpreted as the state's concealed strategic instruments and latent capabilities: the means of intelligence, influence, coercion and surprise whose effectiveness depends partly upon their remaining undisclosed (LAOZI, 1963, ch. 36). A state that allows those

instruments – or the infrastructure on which they depend – to be seen, held or conditioned by others has let the fish leave the deep. The argument that follows is that **South Africa has done so with its critical energy supply chain.**

On the evening of 20 August 2026 News24 published, and on 21 August updated, an amaBhungane investigation by Susan COMRIE into Eskom's R21-billion emergency diesel programme for the Ankerlig open-cycle gas turbines. Internal Eskom records examined by the reporters showed that in July 2025 the utility entered two purchase orders of 20 million litres each from Lanele Resources as received at Burgan Cape Terminal and paid Lanele approximately R721 million, whereas the Vitol-linked supplier standing behind Lanele, Vesquin Trading, later stated that only five million litres were physically earmarked in tank and that some 38.8 million litres remained to be supplied on demand (COMRIE, 2026). By June 2026 roughly 40 million litres, then worth about R1 billion, was still outstanding, almost all of it attributed to Lanele. Eskom's own arrangement with its suppliers required that diesel be delivered into secured storage before payment; the utility's SAP system treated a signed goods-received entry as the trigger for payment. The article's verdict on the transaction is the hook of this paper:

*at best a sleight of hand, at worst a fraud.*

(COMRIE, 2026)

The phrase is worth holding. It captures a structure – paper title separated from physical molecules, an intermediary inserted between a state utility and an established global trader, an emergency used to justify accelerated payment, and a verification system that records what it is told rather than what exists – that this paper argues is neither new nor accidental. Eskom has confirmed that a forensic investigation into the diesel procurement and storage contracts is under way and that matters have been referred to the Hawks (ENGINEERING NEWS, 2026); none of the suppliers named in this paper has been convicted of any offence, and all allegations remain allegations.

Earlier reporting had already established the shape of the programme. Eskom advertised tender MWP2197GX in October 2023 and awarded it in December 2024 to five suppliers – African Forwarding and Shipping, Astron Energy, Lanele Resources, Nutinox and Severino Industries – to supply and store roughly one billion litres of diesel over five years. Three of the five were thinly established intermediaries that received allocations of approximately R4.36 billion, R4.36 billion and R4.38 billion respectively, and at least fifteen prepayments totalling

R2.97 billion were made between February and April 2025 (AMABHUNGANE, 2026). Severino's sole director at the time of award was a 24-year-old graduate appointed a week before the tender closed; Nutinox, with a 2023 turnover of about R24 million, had shortly before shared a R263-million Johannesburg water-tanker contract later declared invalid (AMABHUNGANE, 2024; AMABHUNGANE, 2026).

## 2. Position of this paper in the National Security Series

This paper has three connected purposes within the National Security Series:

1. It forms part of a **larger investigation** into the **survival and revitalisation of the old-order apartheid security apparatus**, its merger with **post-apartheid corruption**, and its embedding in the **KwaZulu-Natal-Gauteng nexus**, including the backward links of these networks to **foreign interests and agendas**.
2. It issues an **alert regarding critical threats, vulnerabilities and opportunities (TVOs)** in South Africa's **energy-supply value chains and infrastructure**, using the Eskom diesel chain as a focused probe into weaknesses that require urgent investigation.
3. It draws attention to the **connections between old-order Natal-Gauteng networks and contemporary operations such as Operation Dudula**, and to their functioning as **strategic misdirection**: the cognitive diversion of public, political and security attention away from the more consequential vulnerabilities created by **foreign penetration of, leverage over and potential control within critical national networks**.

The clearest contemporary expression of the first problem is being exposed, witness by witness, before the Madlanga Commission of Inquiry into Criminality, Political Interference and Corruption in the Criminal Justice System. The Commission was announced by President RAMAPHOSA on 13 July 2025 after the KwaZulu-Natal Provincial Commissioner, Lieutenant-General Nhlanhla MKHWANAZI, alleged the existence of

*a sophisticated criminal syndicate that has allegedly infiltrated law enforcement and intelligence structures*

(THE PRESIDENCY, 2025)

Its terms of reference, gazetted in Proclamation 269 of 2025, direct it to investigate the infiltration of the police, intelligence, prosecution and judicial structures by criminal syndicates, the facilitation of organised crime by officials and politicians, and the deliberate obstruction of investigations (REPUBLIC OF SOUTH AFRICA, 2025). The Commission's life was extended in March 2026 (SOUTH AFRICAN GOVERNMENT NEWS AGENCY, 2026).

This paper is therefore an interim work in progress and must be read together with the first paper in the series, **ZAI: On Secret Statecraft and Novel Types of Threats, Vulnerabilities and Opportunities in the New Era** (ZAAIMAN, 2026a), in which a new family of threats, vulnerabilities and opportunities – TVOs – was crystallised, named and illustrated with empirical case studies drawn from South Africa's cellphone-tower estate and its 'local' drone programmes. That paper also analysed the unpreparedness of the SANDF, the intelligence services and the national-security community to discover, detect, trace, anticipate and deal with TVOs of this type (ZAAIMAN, 2026a, pp. 27/30). The present paper does not repeat that analysis. It performs a narrower function: it is an alert, focused on one small component of the national energy sector and on the critical weaknesses that component reveals, and it identifies what must be investigated before the larger study can be completed.

One of the strategic objectives of the research project is to track and trace the old-order security apparatus: how it survived, revitalised itself and embedded itself in the post-apartheid private sector, the state, civic formations, political parties and organised criminal networks and gangs. That inquiry does not concern financial corruption alone. It concerns the targeting, penetration and corruption of the criminal-justice system itself, beginning with the FBI-trained Directorate of Special Operations and continuing through the ascent of officers who began their careers inside the apartheid police into the commanding heights of the South African Police Service and its Crime Intelligence division. Several case studies in preparation trace the merger of corrupt old-order networks – particularly those connected to the killing fields and covert operations of Vlakplaas, the Civil Cooperation Bureau, Inkatha and Military Intelligence in Natal and the Transvaal in the 1980s and 1990s – with revitalised criminal networks that now reach into the prisons, the private-security industry and the state, and that are increasingly intertwined with geopolitics, geo-economics and technology. Where this paper relies on those working traces (ZAAIMAN, 2026b; 2026c; 2026d; 2026e) it says so, and it preserves their evidentiary grading.

### 3. Zai: the method and the vocabulary

Zai is a Mooré word of the Mossi people of Burkina Faso, also used in Mali, for an indigenous technique of planting in sparse and degraded environments: small pits are dug before the rains, enriched with compost, and seeded, so that scarce water and nutrients are concentrated where the seed needs them and millet or sorghum grows where the surrounding ground is barren. The word itself is linked to rising early and preparing the land in advance – to prepare in anticipation (ZAAIMAN, 2026a, pp. 11/12). In the first paper the concept was subjected to conceptual mining and decompression: its informational structure was abstracted from its agricultural setting and moved, as a declared analogy, into asymmetric strategy, strategic intelligence analysis and secret statecraft, alongside an Iranian-Persianate epistemology of perception drawn from Ibn SINA, SUHRAWARDI, KUBRA, MULLA SADRA and al-FARISI that explains how a defender or an attacker learns to sense latency before it becomes visible (ZAAIMAN, 2026a, pp. 15/19).

The method yielded a rich new vocabulary and, more importantly, an insight into indigenous know-how that is ordinarily submerged beneath the thick layer of Western epistemological hegemony in strategic studies. That hegemony is not a rhetorical target. David GIBBS, writing in *International Studies Perspectives* a quarter of a century ago, observed of the dominant American academy that

*mainstream scholarship is written from the ideological and  
normative standpoint of the makers of U.S. foreign policy*

(GIBBS, 2001, p. 417)

and demonstrated that the covert operations of the intelligence services – the very subject matter of secret statecraft – were systematically written out of mainstream international relations (GIBBS, 2001, pp. 418/419). A strategic community trained inside that canon will not easily see what the canon was designed not to disclose. The conjuncture of the new Eurasian era and the post-American order has begun to loosen that hegemony, and it is precisely in sparse contexts, under limited resources and unequal power, that the alternative archives matter most. Jon LINDSAY's recent study of cybersecurity as secret statecraft defines the field with economy:

*Secret statecraft is the use of organized deception for strategic advantage.*

(LINDSAY, 2025, Introduction)

and his central argument – that success in such statecraft depends less on the sophistication of technology than on political context, and that the trust which makes cooperation possible is exactly what espionage and subversion exploit – is the frame within which the energy chain is read below (LINDSAY, 2025; ZAAIMAN, 2026a, p. 7).

Extended into strategy, **Zai** is the **anticipatory preparation** of selected points in a prospective environment into which capability, access or influence is concentrated so that it remains latent until conditions enable it to generate disproportionate effect. The first paper identified ten techniques the doctrine can generate or must defend against (ZAAIMAN, 2026a, pp. 13/14):

- **the cultivated access point** – a trusted position prepared inside another actor's system;
- **the weak-signal pit** – a collection point tuned to faint early indicators;
- **the cultivated human node** – a person or relationship prepared over time through access, dependence or obligation;
- **the narrative seedbed** – a pre-seeded position in the information environment;
- **the anomaly trap** – a configuration that turns an adversary's probing into the defender's intelligence;
- **the deception garden** – a cultivated set of decoys and false patterns;
- **the dormant option pit** – a capability emplaced and held inactive;
- **the distributed resilience pit** – dispersed, hardened, semi-autonomous capacity;
- **the strategic chokepoint pit** – a small trusted position through which a much larger system must pass;
- **the adversary-resource pit** – an arrangement that turns the target's own assets and dependencies against it.

A final methodological element must be declared, because it governs how the material below is arranged. **Systems-level problems must be analysed at the**

**systems level** – as dynamic interactions among actors, flows, institutions and environments – and not as artificially frozen analytic templates. This is a key element of the **Strategic Intelligence Analysis** developed and used by the African Centre for Security and Intelligence Praxis (ACSIP). It was learned in practice: in the underground experience of the liberation struggle, and in the successful tracing, tracking and exposure of the apartheid regime's secret death squads and its secret statecraft, which succeeded precisely because the squads were pursued as a moving system of personnel, vehicles, cover companies, finance and command rather than as a list of names. The network traces on which this paper draws (ZAAIMAN, 2026b; 2026c; 2026d; 2026e) apply the same discipline.

The **technological or cognitive ambush** – the pager operation against Hezbollah in September 2024 is the reference case – is only the most visible event these techniques can produce. What unites them is a grammar of anticipation, pre-placement, latency and cultivated emergence. The question this paper asks of the energy chain is not whether an ambush has been sprung but which pits have already been dug, by whom, and whether anyone in the South African state is looking.

#### 4. The terrain: anatomy of the Ankerlig diesel chain

Figure 1 sets out the contractual and ownership chain behind the Lanele transaction as it can presently be reconstructed from public sources (AMABHUNGANE, 2026; COMRIE, 2026; VTTI, 2017; VTTI, 2019; ZAAIMAN, 2026b). Eskom contracted Lanele. Lanele contracted Vesquin Trading to meet its emergency obligations. Vesquin relied on the Vitol group's global supply and on storage at Burgan Cape Terminal. Burgan is 70 per cent owned by the Dutch terminal company VTTI, with the local empowerment shareholders Thebe Investment Corporation and Jicaro holding 15 per cent each; VTTI in turn is owned 45 per cent by Vitol, 45 per cent by the Australian IFM Global Infrastructure Fund and 10 per cent by the Abu Dhabi National Oil Company, which acquired its stake in 2019 (VTTI, 2019). Lanele was therefore an additional intermediary between a state utility and a supply-and-storage group already capable of contracting directly, and the unanswered question – why Lanele was necessary when Vesquin reportedly held the empowerment grading required to bid – sits at the centre of the matter.



Vesquin itself is best understood as Vitol's local empowerment and trading vehicle. Court and arbitration papers record that Elderberry Investments 139 historically held 26 per cent of Vesquin, the balance sitting inside the Vitol joint venture, and that Vesquin's director Harvey FOSTER – identified in public competition material as British and based in Cape Town – previously worked for the Swiss trader Masfield Energy Holdings, dealt with PetroSA and the Strategic Fuel Fund from about 2003, and became head of Vitol's South African operations in 2010 (CENTRAL ENERGY FUND v VENUS RAYS TRADE, 2020; ZAAIMAN, 2026b, pp. 10/16). It was FOSTER who, in 2026, explained the Lanele arrangement and the 38.8-million-litre outstanding balance (COMRIE, 2026). He is not a peripheral employee. He is the longitudinal broker linking a Swiss predecessor trader, the state-fuel institutions, Vitol's local empowerment structure, the emergency Eskom channel and the Lanele supply promise. No reviewed record proves any criminal conduct by him; the point is continuity of access, not guilt.

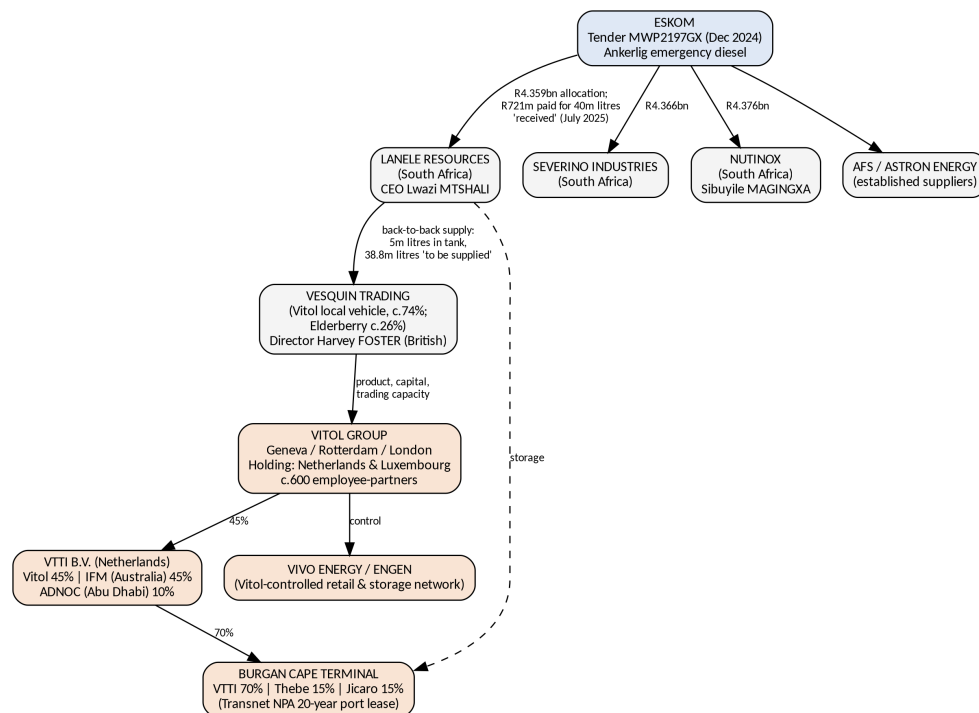


Figure 1. The Ankerlig diesel supply and ownership chain, July 2025 (sources: AMABHUNGANE, 2026; COMRIE, 2026; VTTI, 2017; VTTI, 2019; ZAAIMAN, 2026b). Percentages are as publicly disclosed; certified current share registers are required.

## 5. Backward continuity: one pattern, three iterations

The Lanele transaction acquires its significance only when it is placed in sequence. The Strategic Fuel Fund, PetroSA and Eskom records reveal a **repeated fault line** between legal title, physical custody and promised future supply. In 2015–16 the SFF sold approximately 10.3 million barrels of the nation's strategic crude reserve at Saldanha Bay under the description of a stock rotation; three million barrels of Basrah crude went to the Vitol chain through Vesquin for about US\$78.6 million, roughly US\$26 a barrel, near the bottom of the market and without replacement stock secured. Title passed contractually while the oil remained in state tanks. The Western Cape High Court declared the transactions invalid in November 2020 because statutory, procurement and governance requirements had not been met, and the Supreme Court of Appeal dealt with the consequential restitution in 2022 (CENTRAL ENERGY FUND v VENUS RAYS TRADE, 2020; CENTRAL ENERGY FUND v VENUS RAYS TRADE, 2022). That was civil and administrative invalidity, not a bribery conviction of Vitol, Vesquin or FOSTER; but the same separation of title from custody is the conceptual precedent for Lanele.

In 2018–19, under generation pressure, Eskom instructed PetroSA to obtain emergency diesel, and PetroSA bought more than 32 million litres from Vitol and Vesquin and another supplier outside its ordinary procurement process (MAIL & GUARDIAN, 2019). Thus the Vitol/Vesquin channel was already supplying emergency diesel into the Eskom–PetroSA system six years before the 2024 tender. The 2025 Lanele payments are the third iteration. Figure 2 abstracts the common structure: emergency justification; a selected intermediary; an opaque title or storage arrangement; accelerated payment; incomplete physical verification – and, crucially, a cycle that reseeds itself because the institutional weaknesses that permitted it are never repaired.

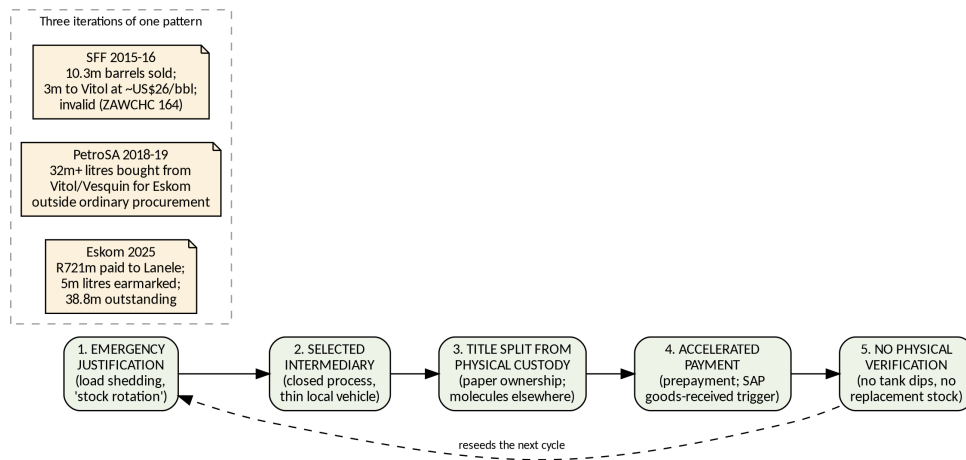


Figure 2. The recurring state-trader-intermediary vulnerability cycle and its three documented iterations (sources: CENTRAL ENERGY FUND v VENUS RAYS TRADE, 2020; MAIL & GUARDIAN, 2019; COMRIE, 2026; ZAAIMAN, 2026b).

Two further facts belong in the backward trace. **First**, Vitol's international compliance record. In December 2020 Vitol Inc. entered a deferred-prosecution agreement with the United States Department of Justice and agreed to pay more than US\$135 million to resolve charges that it bribed officials of state oil companies in Brazil, Ecuador and Mexico, and the Commodity Futures Trading Commission separately ordered about US\$95.7 million for corruption-based fraud and attempted manipulation, including the use of confidential state-company information and intermediaries (UNITED STATES DEPARTMENT OF JUSTICE, 2020; COMMODITY FUTURES TRADING COMMISSION, 2020). Those admissions do not prove that anyone in the Vitol chain bribed anyone in South Africa. They establish a validated global risk pattern – state oil companies, intermediaries, consultants, shell entities, false invoices and preferential trades – that makes full disclosure of the Lanele-Vesquin contract, pricing, title-transfer documents and payment beneficiaries indispensable.

**Second**, the Lanele branch carries its own prior state-enterprise history. Lanele Group, under its chief executive Lwazi MTSHALI, contracted with Transnet Property in 2017 to develop a proposed bulk-fuel storage depot at Ambrose Park beside Durban harbour. A report of Parliament's Portfolio Committee on Transport records that the Special Investigating Unit found evidence of kickbacks paid by Lanele through money-laundering vehicles to former Transnet Property officials responsible for the lease; Transnet is seeking to review the lease and counterclaims about R85.7 million, while Lanele pursues damages of more than

R1.7 billion and denies any corrupt involvement (PARLIAMENTARY MONITORING GROUP, 2025). This is litigation and allegation, not a finding; but it places the Lanele branch inside the Durban port and Transnet procurement ecosystem of KwaZulu-Natal before it appears in the Eskom chain.

## **6. Foreign leverage: who can interrupt, price, observe or condition supply**

**Critical infrastructure must be assessed by who can interrupt, redirect, price, observe or condition supply**, not by the nominal domicile printed on company documents. Read in that way, substantial parts of South Africa's fuel import, storage, wholesale, retail and emergency-supply architecture now depend on foreign-controlled or foreign-managed corporate networks. Vitol is formally Dutch, Swiss and Luxembourg in structure – founded in Rotterdam in 1966, centred operationally in Geneva, held through Vitol Holding B.V. and a Luxembourg parent, and owned by roughly six hundred senior employee-partners in Geneva, London, Singapore and Houston (ZAAIMAN, 2026b, pp. 9/17). But its present South African continuity actor is British; London is a principal management and investment hub; and Vitol-controlled Vivo Energy completed the acquisition of Engen in 2024, creating a network of more than 3,900 service stations across Africa under public-interest commitments negotiated with the Department of Trade, Industry and Competition (DEPARTMENT OF TRADE, INDUSTRY AND COMPETITION, 2024). Through VTTI Vitol holds 45 per cent of the company that controls 70 per cent of Burgan Cape Terminal, which opened in 2017 under a twenty-year Transnet National Ports Authority arrangement with about 122,000 cubic metres of product capacity (VTTI, 2017; ENGINEERING NEWS, 2017). In March 2026 VTTI's owners were reported to have engaged advisers on a possible partial sale, which does not establish that ownership has changed (ION ANALYTICS, 2026).

A further 10 per cent of VTTI is owned by ADNOC, the Abu Dhabi state oil company (VTTI, 2019). The United Arab Emirates is strategically linked to Israel through the Abraham Accords and the subsequent energy, investment, technology and security cooperation that followed them, and ADNOC with BP pursued – and, after suspension amid regional war, retained its stated interest in – a US\$2-billion acquisition of half of Israel's NewMed Energy, a principal Leviathan-field owner (REUTERS, 2024). That record supports describing ADNOC as Israeli-linked Gulf sovereign capital. It does not support saying that Israel owns VTTI, Burgan, Engen

or any Eskom asset, and this paper does not say so. The national-security risk arises from strategic alignment, concentrated foreign influence and dependence, not from an invented shareholding. The finding is therefore precise: South Africa has permitted nationally vital energy functions to become dependent on a British-centred private trading and management network and a terminal company partly financed by an Israeli-aligned Gulf sovereign oil power, alongside Australian institutional capital. Foreign technical competence may be real; competence does not remove sovereignty, continuity, sanctions, intelligence, pricing, cyber, political-leverage or conflict-of-interest risk.

The first paper in this series found the same configuration in the cellphone-tower estate and the drone programmes: commercially ordinary, individually plausible foreign layers – Canadian access control, Indian autonomy software, Israeli integration technology, Turkish-linked ownership of a drone prime, German, French and Emirati sensors and munitions – whose strategic meaning appears only when they are seen together and against a changed environment (ZAAIMAN, 2026a, pp. 20/30). The energy chain is the same lesson in liquid form.

### **6.1 The Campaign Between Wars as Zai: the geopolitical context**

The foreign leverage described above cannot be assessed outside the conflict system in which its holders are embedded. The Israeli strategic doctrine of the **Campaign Between Wars** – in Hebrew MABAM, ha-ma'aracha bein ha-milchamot – is a strategy of continuous, limited operations conducted during periods of formal peace in order to prevent or weaken the next major war. Its central logic is not to wait for an adversary's capabilities to become operational but to disrupt them while they are still being assembled. It combines intelligence operations against weapons transfers, production sites, command networks, financing and logistics routes; covert or deniable action such as sabotage, cyber operations and disruption of procurement; limited military strikes designed to impose damage below the threshold of general war; diplomatic and economic pressure through sanctions, interdiction and pressure on third countries and companies; and information and cognitive operations that shape how the adversary assesses the costs of continuing. It is broader and more continuous than the related Israeli practice of periodically "mowing the grass" – degrading a threat that cannot be eliminated (INBAR and SHAMIR, 2014, pp. 65/90) – because it seeks to shape the strategic environment itself. Its inherent contradiction is that operations intended to prevent war may cumulatively make war more likely: they provoke retaliation,

accelerate and disperse the adversary's programmes, erode red lines, normalise cross-border attack and transform the campaign between wars into the opening phase of the war itself.

In the **Zai** framework of this series the **Campaign Between Wars** is **strategic pre-positioning** during apparent peace: the degrading of an adversary's latent capability while one plants one's own intelligence access, technological advantage, operational pathways and cognitive effects for activation in a future crisis. It is simultaneously war prevention, battlefield preparation and controlled covert war. Read in this way, the intensified economic strategy declared by President TRUMP against Iran in August 2026 – announced as the

*most crushing economic operation ever taken against any country*

(AL JAZEERA, 2026)

– should be understood as the contextually adapted Israeli-American version of the Campaign Between Wars. The covert and kinetic strategies of 2025 and 2026 have failed thus far to degrade Iran's pre-positioned, hardened and latent capability (ZAAIMAN, 2026a, pp. 5/6); contemporary reporting records that, facing munitions shortfalls and an unpopular war, Washington has reverted to sanctions and naval blockade (BLOOMBERG, 2026). The economic campaign is therefore the softening-up phase for the next round of kinetic and covert attack. This is the subject of a separate forthcoming paper in this Series, on Zai and Strategic Intelligence Analysis in the ongoing Israeli-American aggression against Iran and against Russia in Ukraine, treated as a fast-converging and escalating geopolitical conflict system carrying enormous economic and financial risk for the American-Western economic system and its well-being.

The relevance to South Africa is direct. This research project has already alerted on the risk of recession in the Western economic hemisphere and on the need for South Africa to disentangle itself from its structural over-reliance on a sinking American-Western ship, and to seize the risk of crisis to reorient its economic structure towards Eurasia and the development of a new productive structure. The third phase of the Government-Business Partnership launched on 20 August 2026 by the ANC-led government together with the white-dominated old-order economic and business elite does the opposite: it doubles down on mining, agriculture and tourism in order to "create jobs" (THE PRESIDENCY, 2026) – the very orthodox policy paradigm and narrative that has produced stagnation, and that is now accelerating the domestic national-security risk of popular instability in

the polity. An energy chain whose chokepoints are held by British-centred private capital and Israeli-aligned Gulf sovereign capital is, in that conflict system, not a neutral commercial fact.

The link between the **Campaign Between Wars** and **Zai** is therefore not an analogy but an operational identity, and it explains why the risks set out in sections 4 to 6 permit a **grey-zone CBW campaign** to be conducted against South Africa's critical energy infrastructure without a declared act of hostility. A CBW campaign is waged below the threshold of war through pre-positioned access; **Zai** is the grammar of such pre-positioning. Where a foreign-centred trading and terminal network already holds **title, storage, emergency supply** and **pricing information** across Eskom's diesel procurement, the import and wholesale chain, the terminal estate and the downstream distribution network, the cultivated access points, chokepoint pits and dormant option pits of the doctrine are already in place. Two consequences follow. **First**, the configuration gives foreign Western powers with lawful or unlawful reach into those companies an effectively unlimited **intelligence-collection** access to the architecture and real-time state of South Africa's critical energy system – its stock levels, its emergency posture, its supplier dependencies and its administrative weaknesses. **Second**, it places the same actors in a critical position to **influence** and, at a moment of their choosing, **covertly disrupt** supply, storage and distribution – by repricing, by withholding executory supply, by conditioning credit or by conveniently timed compliance failures – and so to inflict on South Africa an economic stress of the same kind that President TRUMP now seeks to mete out to Iran by blockade and sanction. The diesel that did not exist is a small demonstration that the lever is real and that no one in the state is holding the other end.

## 6.2 Operation Dudula, March and March and Abahambe: geo-strategic distraction and diversion

The campaigns of **Operation Dudula, March and March** and **Abahambe** against undocumented foreign Africans must be placed in this analysis, because they are an instance of the same **state and governance failure** as the unsecured energy supply chain and the economic insecurity and risk it produces, and because they perform a precise geo-strategic function. March and March, founded in Durban by Jacinta NGOBESE-ZUMA, organised demonstrations against undocumented migrants in Pretoria, Johannesburg and Durban in April and May 2026 with violent and sometimes fatal results (HUMAN RIGHTS WATCH, 2026); it set 30 June 2026

as a deadline for undocumented foreigners to leave, led protests in all nine provinces on that day with more than twenty civic groups, announced weekly marches thereafter, and on the final day of the SADC summit in Durban in August demanded mass deportation by 30 September (INDEPENDENT ONLINE, 2026a; 2026b). It borrows the symbols and movement-building of the civic sector and presents itself as a grassroots organisation (DAILY MAVERICK, 2026). Its earliest Durban actions were staged with Operation Dudula and the MK Party. The target of all three campaigns is **fellow Africans**.

Read through Zai, these campaigns are **cognitive-technological Zai** directed at South Africa itself: a **narrative seedbed** and a **cultivated human node** prepared in the information environment and in the streets, whose function is to **distract** public attention and to **divert** the police, the intelligence services and the political class away from the real national-security TVOs. Their geography and personnel overlap with the KwaZulu-Natal old-order-corruption networks and the post-Scorpions police and intelligence factions examined in section 8. The real problem from which they divert attention is the **foreign, Western embedded pre-positioning and control** over the country's critical energy supply chains and infrastructure described in sections 4 to 6 – of which the diesel episode is the clearest current example – a configuration that hands those powers **complete intelligence-collection access on a silver platter**: to the architecture, stock levels, emergency posture, supplier dependencies and administrative weaknesses of the national energy system, together with the latent capacity to influence and disrupt it. A security apparatus consumed by deportation campaigns while foreign capital holds its fuel chokepoints has been successfully diverted. The research project treats the convergence of the KZN networks, the weaponised criminal-justice system, the anti-African campaigns and the unsecured energy chain as one system and as a prepared condition; whether it was cultivated by a foreign hand or merely exploited by one is an investigative question the evidence must answer.

## 7. Reading the energy chain through the ten techniques of Zai

The critical energy supply chain and its infrastructure, sitting inside an unsecured economy, is vulnerable to every technique the Zai doctrine generates. Table 1 maps the ten techniques onto the chain described above. The entries in the right-hand column are not findings that a hostile actor has done these things; they are the fertile points at which a prepared actor could, and at which a defender must therefore look. Several are already partially documented in the public



record.

| Zai technique              | Fertile point in the South African energy chain                                                                                                                                                                                   |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Cultivated access point    | Trusted positions inside state-fuel institutions prepared over two decades: the Masfield/PetroSA/SFF → Vitol/Vesquin → Eskom continuity; tender-design and storage-rule authorship; SAP goods-receipt authority.                  |
| Weak-signal pit            | Confidential competitor pricing, tank-dip data, Transnet port and terminal information and Eskom emergency-command traffic as collection targets (the CFTC order describes exactly this use of state-company information abroad). |
| Cultivated human node      | Thinly capitalised, politically connected local intermediaries; officials who certify receipt; due-diligence contractors; the blue-light and private-security brokers of the Madlanga evidence.                                   |
| Narrative seedbed          | “Localisation”, “empowerment” and “emergency” framings that legitimise intermediaries and deviations before anyone asks what the intermediary contributes.                                                                        |
| Anomaly trap               | For the defender: SAP audit logs, terminal timestamps and tracking data that turn an intermediary’s own movements into evidence – presently unused.                                                                               |
| Deception garden           | Comingled tanks, back-to-back executory supply promises and goods-received notes that make paper stock indistinguishable from physical stock.                                                                                     |
| Dormant option pit         | Foreign step-in capacity over storage, title and emergency availability held latent until a crisis, sanction or political moment makes it valuable.                                                                               |
| Distributed resilience pit | For the defender: minimum physical reserves, diversified suppliers and dispersed in-country storage – largely absent since the 2015–16 disposal.                                                                                  |
| Strategic chokepoint pit   | Burgan Cape Terminal and the VTTI/Vitol/ADNOC/IFM chain above it; Transnet port tenure; Vivo/Engen’s downstream network.                                                                                                          |
| Adversary-resource pit     | The state’s own emergency authority, prepayment mechanism and B-BBEE licensing turned into the means by which it pays for molecules it does not hold.                                                                             |

Table 1. The ten Zai techniques (ZAAIMAN, 2026a, pp. 13/14) mapped onto the energy chain.

Two techniques deserve emphasis because they are the ones the national-security community is least prepared to see. The **techno-cognitive ambush** does not require sabotage of a turbine; it requires only that those who command the

emergency response believe stock exists that does not, at the moment of a stage-six load-shedding event, which is precisely what the February 2025 Emergency Response Command Centre minutes appear to describe (COMRIE, 2026). The **foreign ambush** does not require a hostile state to own anything; it requires only that the capacity to interrupt, reprice or condition supply sits with actors whose strategic alignment is not South Africa's, and that the state has no independent picture of its own tanks. Both are latent conditions. Neither is visible to a threat assessment that counts brigades and borders.

## **8. The old-order security apparatus and the KwaZulu-Natal-Gauteng nexus**

### **8.1 The substrate**

Natal was a principal theatre of the apartheid covert war. The Security Branch counter-insurgency unit based at Vlakplaas, known successively as C1 and C10, leased at least four farms or bases in the province during the 1980s, recruited captured guerrillas as askaris and penetrated the ANC and MK underground. The Piet Retief ambushes of June 1988, in which Surendra 'Lenny' NAIDU and three comrades were delivered unarmed by a Security Branch-controlled driver to a prepared killing ground, weapons were planted and a false armed-contact account produced, are the documented model of a complete covert-action cycle: penetration, controlled transport, killing, evidence fabrication and concealment (TRUTH AND RECONCILIATION COMMISSION, 2001). The author of this paper was a member of the small ANC underground team that traced, tracked and revealed these secret death squads – Vlakplaas and the Civil Cooperation Bureau – in the 1980s; the method of that exposure is the origin of the systems-level tracing applied here. Military Intelligence, through its covert-collection structures, ran Operation Marion, trained some two hundred Inkatha recruits in the Caprivi in 1986 and used civilian and private-security cover to conceal the SADF origin of operatives; fourteen people were killed at KwaMakhutha in January 1987 by Caprivi trainees assisted by Military Intelligence operatives (TRUTH AND RECONCILIATION COMMISSION, 1998, Vol. 2). The Civil Cooperation Bureau was a separate SADF Special Forces structure that used regional cells, front companies and covert contractors. These bodies were distinct and must never be treated as interchangeable; a person is linked to one of them only by a personnel file, an operational record, an amnesty application or sworn evidence (ZAAIMAN, 2026e,

pp. 6/7).

The underground was penetrated in both directions. Moe SHAIK's handling of a Durban Security Branch source in Project Bible, through a chain commanded by Jacob ZUMA from Mozambique, and the later Operation Vula produced durable relationships among intelligence operatives, logisticians, lawyers, political leaders and financiers; Schabir SHAIK's 2005 conviction for corruption in his relationship with ZUMA is the documented post-1994 sequel to that network (ZAAIMAN, 2026e, pp. 7/8). None of this shows that the apartheid state controlled the later network. It shows that the same province produced, within a decade, a covert-war system and a political-business system whose personnel overlapped.

## 8.2 The criminal-justice transition

Post-1994 continuity occurred through people and institutions. The new police service absorbed the former South African Police, the KwaZulu Police and the homeland forces. The Scorpions – the Directorate of Special Operations, established in 2001 – recruited 87 members from SAPS and further members from the intelligence community, and its investigators were trained in programmes arranged with the FBI and Scotland Yard, among others (REDPATH, 2004; ZAAIMAN, 2026e, p. 9). The charge that the unit was staffed by old-order security personnel has been made politically for nearly twenty years: in 2008 Julius MALEMA publicly described the Scorpions as containing apartheid-era agents, and the former justice minister Penuell MADUNA rejected the claim, explaining that recruits came from SAPS, which had already absorbed the former forces (INDEPENDENT ONLINE, 2008). This paper records the proposition as a serious research hypothesis of the wider project and is explicit that the available public record does not yet supply the recruitment and personnel roster that would prove or disprove it for any named block of the 87. The same discipline applies to the second proposition – the ascent of officers who entered the apartheid police system before 1994 into the commanding heights of SAPS and Crime Intelligence. The public career of Major-General Feroz KHAN, who joined police intelligence as a constable in September 1991 and rose to deputy head of Crime Intelligence before appearing at the Madlanga Commission in 2026, is the clearest documented instance; his exact 1991 unit, station, handlers and courses are not publicly identified and are required before any Security Branch attribution is made (ZAAIMAN, 2026e, p. 3). Bruce's analysis of the political pressures surrounding the Scorpions before their dissolution remains the best academic account of how an

integrated investigative capability became a factional object (BRUCE, 2008).

The dissolution of the Scorpions in 2009, resolved at the ANC's Polokwane conference in December 2007, moved personnel and dockets into SAPS structures. Two traces in this project illustrate what moved. Junaid JOHNSON, recruited into the Scorpions in 2007 in a process involving his wife, the later Investigating Directorate head Andrea JOHNSON, entered Crime Intelligence after 2009 and rose to brigadier – a named, documented transfer route from the DSO into the intelligence environment (ZAAIMAN, 2026e, p. 3). Shadrack SIBIYA, who joined SAPS in 1989, served at Interpol, entered the Scorpions in 2001 and established and led its Free State and Northern Cape offices from 2004, has said the unit held solid dockets against Ace MAGASHULE and was ready to arrest him when the Scorpions were abolished – MAGASHULE having been a leading advocate of rapid dissolution (ZAAIMAN, 2026c, pp. 9/10). SIBIYA then led the Gauteng Hawks, revived the investigation that arrested Crime Intelligence head Richard MDLULI in 2011, was removed in the Zuma-era purge that the courts later found unlawful, was reinstated in 2022 and returned as Deputy National Commissioner for Crime Detection in 2023 (ZAAIMAN, 2026c, pp. 12/14).

The criminal-justice system as a whole is under attack, and the attack takes the form of instrumentalisation and weaponisation rather than mere evasion. The case of Andrea JOHNSON, until July 2026 head of the Investigating Directorate Against Corruption, reveals it. Over six days before the Commission she was questioned on investigations that allegedly fell outside the directorate's mandate, on the solicitation of an affidavit from the politician Fadiel ADAMS, on the handling of an assault docket involving Major-General Feroz KHAN, and on WhatsApp messages that disclosed a far closer personal relationship with KHAN than she had first admitted; she resigned, and a former subordinate then testified that her leadership had orchestrated attacks on the National Police Commissioner (SUNDAY TIMES, 2026a; 2026b). These are allegations under inquiry. Their structural meaning is that the prosecuting authority's specialised anti-corruption arm – the institutional successor to the Scorpions – is itself contested terrain between police factions, intelligence officers and private interests. Writing in the Sunday Times before that evidence emerged, Itumeleng MOKOENA drew the systemic conclusion from the Commission's preliminary findings: a criminal-justice system structurally fragmented and strategically outmatched by the adaptive networks it is meant to contain, of which he observed that

*The system does not merely underperform – it works against itself.*

(MOKOENA, 2026)

### **8.3 The contemporary network before the Commission**

The historical irony is the hinge of the project. By 2025–26 SIBIYA, suspended, stood accused before the Madlanga Commission of reproducing the very pattern he had once confronted: politically connected private actors operating through weakened institutional boundaries. The publicly available evidence supports a cautious but serious working hypothesis that he became a brokerage node between senior police authority and several civilian capability clusters (ZAAIMAN, 2026c, pp. 15/16). The clusters are described below and Figure 3 sets out the architecture as presently reconstructed.

The clusters are these. Stuart SCHARNICK, a Richards Bay businessman with construction and logistics interests, whom Crime Intelligence head Lieutenant-General Dumisani KHUMALO testified was connected to 34 criminal matters including 18 convictions, supplied SIBIYA with a vehicle and what SIBIYA described as bodyguard services; KwaZulu-Natal police stated that an SAPS employee entered the criminal-record system on 16 January 2025 and deleted entries benefiting him; and on 20 August 2026 he was arrested at the Commission after a journalist laid an intimidation complaint (NEWS24, 2025; ENCA, 2026). SCHARNICK disputes the characterisation of his record and has been convicted of nothing arising from the Commission. Vusimuzi ‘Cat’ MATLALA, the operator of the SAPS healthcare contract through Medicare24 Tshwane District and a person whose companies the Special Investigating Unit placed inside a Tembisa Hospital procurement syndicate, is alleged to have made payments to SIBIYA; Sergeant Fannie NKOSI, a SIBIYA subordinate, is alleged to have moved cash between MATLALA and SIBIYA, visited Katiso ‘KT’ MOLEFE in a state vehicle whose tracking was inactive, and forwarded confidential police information to Steven MOTSUMI (ZAAIMAN, 2026c, pp. 4/5; 2026d, pp. 3/4). MOTSUMI – private security, finance, chrome mining, taxi relationships – and Jotham ‘Mswazi’ MSIBI were shown by the evidence leader to have pursued the acquisition of cellphone-interception and monitoring equipment from a Czech supplier, Invasys, which was led to believe the demonstration was for SAPS while the apparent destination was eSwatini; and MOTSUMI negotiated a R20-million loan to Medicare24 in return for which Mike VAN WYK authorised MOTSUMI’s Vhazwimi Security to register and operate emergency-response vehicles nationally (ZAAIMAN, 2026d, pp. 3/5).

VAN WYK is the point at which the historical and contemporary traces touch. His companies describe him as an experienced former security officer without identifying the service, unit or dates; his visible corporate history begins only in 2013; and he has admitted that the Cape underworld-security figure Mark LIFMAN, killed in November 2024 while facing charges in the Wainstein matter, protected him after a mining-related threat (ZAAIMAN, 2026e, pp. 13/15). A biographical gap is not proof of apartheid service, and this paper treats it as a precise records request. But the functional pattern across the clusters – civilian vehicles with apparent official status, private protection, police information, criminal-record manipulation, surveillance procurement under a false state flag and emergency justifications – is the pattern of the Piet Retief cycle transposed into a procurement economy: penetration, controlled logistics, fabricated documentation and concealment. Similarity of method cannot identify a participant. It can, and should, direct where records are sought.

## 9. Graded bridges between the diesel cluster and the Madlanga networks

The research discipline of this project is to separate documentary bridges from structural parallels and from unproven leads. Applied to the diesel suppliers, the result is three graded bridges and one clear negative (ZAAIMAN, 2026b, pp. 5/28), summarised in Figure 3.

- **A documented political-economic bridge.** Thembile MAGINGXA – a relative of Nutinox’s sole director, himself briefly a Nutinox director in late 2023 – has been president of the South African National Military Veterans Association and a prominent MKMVA figure and Zuma supporter; an affidavit he signed on 4 July 2014 recorded that MKMVA had been issued shares in the Gupta family’s Islandsite Investments in 2011, and the same #GuptaLeaks reporting documented Gupta funding of an MKMVA conference (MAIL & GUARDIAN, 2017). This connects the Nutinox branch to the Zuma-Gupta environment of state capture, not to the operational Madlanga cluster.
- **A documented procurement-corruption bridge.** Lanele’s Durban-port project is the subject of litigation in which Transnet and the SIU allege kickbacks to former Transnet Property officials (PARLIAMENTARY MONITORING GROUP, 2025). This places the Lanele branch in the same KwaZulu-Natal state-enterprise procurement ecosystem – Durban port, bulk fuel, logistics,

Transnet officials – that the Richards Bay, taxi, trucking and private-security networks of the Madlanga evidence inhabit, though not beside a named Madlanga actor.

- **A structural and functional bridge.** Both matters concern private intermediaries translating political or official access into contracts, information, vehicles, storage, logistics or emergency capability, under emergency conditions, with weak verification, unusual administrative overrides and official systems – SAP goods-received entries in one case, police documentation and blue lights in the other – used to manufacture apparent legitimacy.
- **A tested negative.** No public record reviewed establishes a direct communication, shared company, payment, address or meeting between the diesel-supplier principals and MOTSUMI, MSIBI, NKOSI, MOLEFE, MATLALA, SIBIYA, VAN WYK or SCHARNICK, nor any such link to Vitol, Vesquin, VTTI, Burgan or FOSTER.

The valid next step is therefore not to infer a unified conspiracy from obscurity or tender success, but to compare beneficial owners, bank counterparties, fuel transporters, security providers, consultants, lawyers, handsets and addresses across the two datasets. The Hawks and SAPS environment becomes a future bridge only if the diesel criminal referral is handled by officers already implicated or connected in the Madlanga evidence – a possibility the Commission's own terms of reference were written to address.

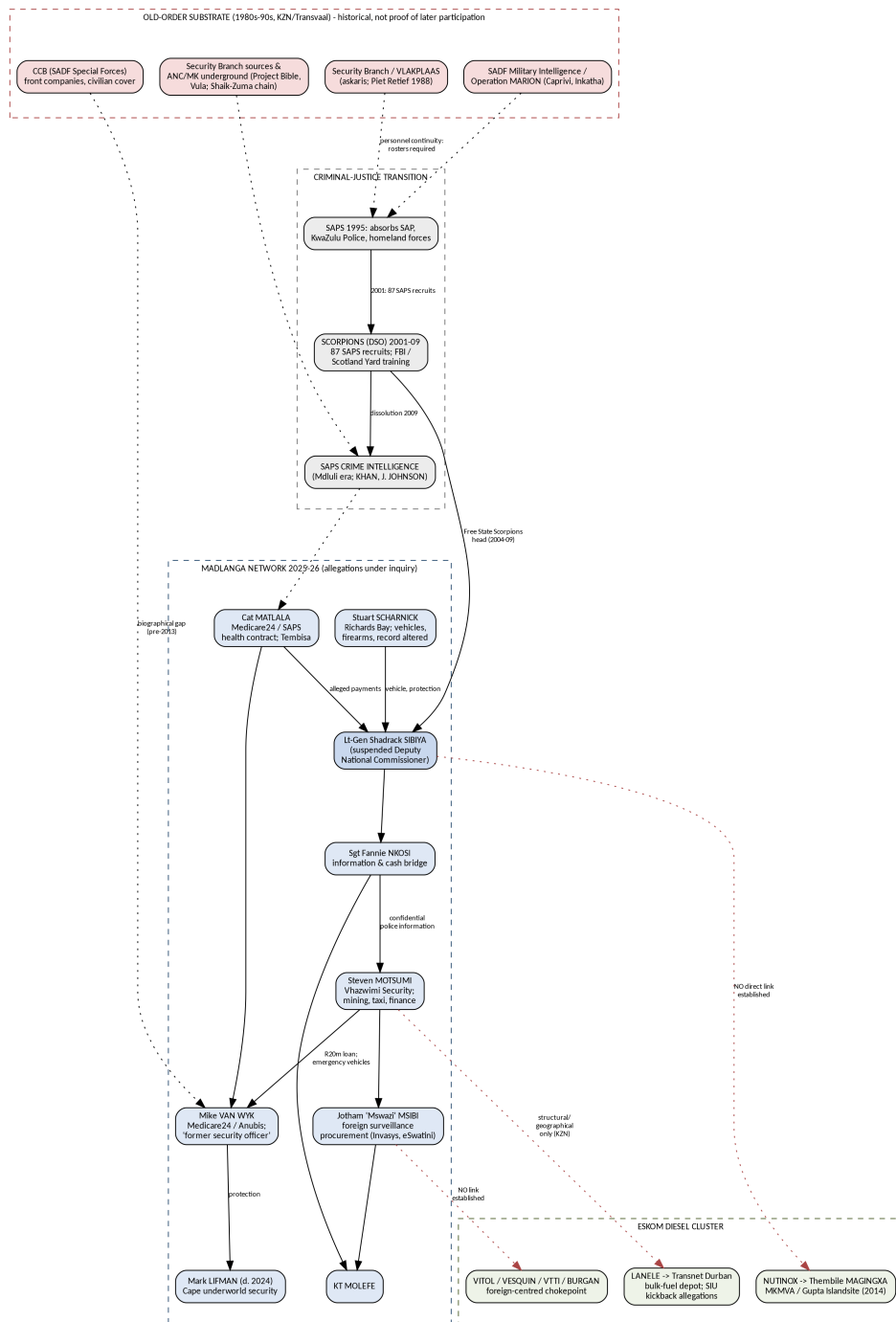


Figure 3. The old-order substrate, the criminal-justice transition, the Madlanga network and graded bridges to the Eskom diesel cluster (sources: TRUTH AND RECONCILIATION COMMISSION, 1998; 2001; REDPATH, 2004; NEWS24, 2025; ENCA, 2026; ZAAIMAN, 2026b-e). Dotted lines denote structural proximity or an unresolved lead; red dotted lines denote a tested negative – no direct link established.



## 10. The unprepared defender and the localisation trap

The first paper concluded that the SANDF, the intelligence services and the national-security community have neither the doctrine nor the instruments to discover, detect, trace and anticipate TVOs whose decisive act is longitudinal preparation rather than a visible strike (ZAAIMAN, 2026a, pp. 27/33). The energy chain confirms it. The state had no independent, real-time picture of the physical contents of the tanks it was paying for; its due-diligence contractor reportedly did not escalate obvious corporate and litigation red flags; its forensic response was outsourced to a private contractor under an emergency contract; and the only actors with a complete view of title, pricing, storage and emergency availability were the foreign trader and its terminal affiliate. A strategic community that counts no tank, reads no SAP log and holds no beneficial-ownership register cannot see a pit until it germinates.

The corrective is not the reflexive one – the **localisation trap**. Replacing foreign control with politically connected local intermediaries may increase rather than reduce corruption. If a state that lacks fuel-trading expertise, storage visibility, procurement discipline, beneficial-ownership intelligence and independent enforcement merely interposes nominally local suppliers between itself and established refiners, importers and terminal owners, it creates additional rent-seeking layers while leaving the molecules, finance and infrastructure in foreign hands. Lanele, Nutinox and Severino illustrate the trap: empowerment credentials inserted thinly capitalised vehicles between the state and a well-capitalised foreign supply system without creating sovereign capability. The state remained dependent but paid more, saw less and assumed greater operational risk. Private-sector participation is not itself a safeguard; the evidence shows that opaque public-private interfaces are exactly where title, pricing and beneficial ownership become least visible.

The required response is public command over the system rather than public ownership of every truck and tank. That is the work of a **developmental state**: a state that treats the securitising and securing of the political economy – its productive structure, its critical infrastructure, its energy, data and financial systems – as a single task of comprehensive security, and that uses its own economic weight deliberately to build domestic productive capability where dependence has become a vulnerability. The first paper located that prescription in the Constitution itself (ZAAIMAN, 2026a, pp. 31/32): section 217 requires

procurement that is

*fair, equitable, transparent, competitive and cost-effective*

(REPUBLIC OF SOUTH AFRICA, 1996, s 217)

and in the Public Procurement Act of 2024 (ZAAIMAN, 2026a, pp. 31/32). In counter-Zai terms that means: a strategic-stock policy with minimum physical reserves; title and custody registries; real-time, independently verified tank measurement; port and terminal access and step-in rights held by the state; price intelligence; immutable digital audit trails for every goods-receipt, payment-term change and vendor-master alteration; open-book intermediary margins; independently verified beneficial ownership; diversified suppliers; and criminally accountable officials. Private firms should serve a state-controlled security architecture; they should not become the architecture.

## 11. Conclusion and investigative priorities

The diesel that did not exist is a small thing beside a national energy system. It is examined here because it is a specimen. It shows the technique of the cultivated access point, the deception garden, the chokepoint pit and the adversary-resource pit operating in the same transaction; it shows the same fault line reseeding itself across three state institutions in a decade; it shows a supply chain whose capacity to interrupt, reprice and observe sits with a British-centred private trading network and Gulf sovereign capital aligned with Israel; and it shows a state that cannot see its own tanks. Set beside the Madlanga evidence it also shows that the grammar of the old covert war – penetration, controlled logistics, fabricated documentation, concealment – has been transposed into a procurement economy in which senior police authority, private security, emergency vehicles, surveillance technology and foreign suppliers meet. Whether the two clusters are one network or two instances of one vulnerability is a question the documents, not the analyst, must answer. The priorities for the next phase of the project follow.

- **Corporate and beneficial-ownership reconstruction:** certified CIPC histories, securities registers and bank mandates for every diesel supplier and related entity, for Vesquin, Burgan, Thebe and Jicaro, and for the Madlanga companies, compared for common officers, addresses and agents.

- **Money:** every Eskom payment traced downstream for thirty days; the destination of the R721 million; Lanele, Vesquin and terminal margins separated from the regulated base price; beneficiaries compared with the Madlanga datasets.
- **Systems:** immutable SAP user logs for goods receipt, invoice verification, early-payment terms, reversals and vendor-master changes, with terminal timestamps and delegation chains.
- **Physical fuel:** tank-dip records, independent inspection certificates, bills of lading, comingled-tank ownership rules, truck GPS, weighbridge slips and Ankerlig gate logs.
- **Continuity of access:** FOSTER's term sheets, delegated authorities and communications across the SFF, PetroSA and Lanele episodes; Rakoma's due-diligence scope; the complete Itsamaya forensic report, drafts and appendices.
- **The old-order roster:** the DSO recruitment and personnel files of 2001–09; pre-1994 service records of senior Crime Intelligence officers; the SAPS audit trail of the January 2025 criminal-record alteration; VAN WYK's original SAPS, SADF/SANDF, intelligence and PSIRA records.
- **Foreign interest:** the sanctions, intelligence and political-leverage exposure created by the Vitol/VTI/ADNOC/IFM chain and by the Invasys and eSwatini surveillance channel, assessed as strategic alignment rather than ownership.
- **Doctrine:** the adoption by the national-security community of counter-Zai practice – provenance verification, segmentation, behavioural baselines, independent inspection, in-country hosting and governance of trusted suppliers – for the energy chain as for the tower and drone estates.

To see the pit before it germinates, and to prepare one's own ground before the environment turns, is the whole discipline of Zai. The energy chain has been someone else's prepared ground for a decade. The alert of this paper is that the state has not yet begun to dig.

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