Dialogue Online

"The elders sit under the big tree and talk until they agree... talking until you agree (or agree to disagree) is the essential (essence) of the traditional African concept of democracy..."
Julius Nyerere

The New Scramble for Critical Minerals: Can Africa Shape the Rules of the Green Economy?

When United Nations (UN) Secretary-General Antonio Guterres addressed the 39th African Union (AU) Summit in Addis Ababa in February 2026, he did not mince his words. Africa's mineral wealth, he insisted, must serve the interests of its people. There must be *"no more exploitation"* and *"no more plundering"* of the continent's resources.[1] The applause was considerable. The question is whether his words will translate into meaningful change - or whether they will join a long list of declarations that history has quietly shelved.

The summit coincided with the Munich Security Conference, which took place in the same month, and the contrast was stark. While African leaders reaffirmed the continent's sovereign claim over its resources, the world's major powers were doing something rather different – staking theirs. United States (US) Secretary of State Marco Rubio made Washington's position explicit: critical minerals are a core element of American supply chain sovereignty, and Africa is where the US intends to secure them. The Trump administration's 2025 National Security Strategy had already positioned critical minerals as a top-tier national interest, driven by deep anxiety over dependence on China.[2] China, which moved earliest and most comprehensively, currently controls approximately 87 percent of global processing for rare earth and strategic minerals - having spent decades investing not only in mining access but in mastering refining capacity, the more strategically consequential capability.[3] The European Union (EU), meanwhile, has been signing memoranda of understanding with African mineral producers, most notably on sustainable raw materials and green hydrogen with Namibia. Gulf states are quietly deepening their investment footprints.[4] Each of these actors is pursuing Africa's mineral wealth through a distinct strategic logic. What they share is urgency.

The results of that urgency are already visible. Weeks before the AU Summit, Washington had brokered a deal granting American companies priority access to the Democratic Republic of the Congo's (DRC) vast reserves of cobalt, copper and lithium - tied to a fragile peace arrangement with Rwanda, and requiring Kinshasa to amend its mining laws, tax policies and potentially its constitution within twelve months.[5] Congolese lawyers and human rights defenders promptly challenged the deal in court, citing violations of the country's sovereignty.[6] The scramble has already begun. But unlike the original scramble of the nineteenth century, today's competition does not arrive with gunboats. It arrives through contracts, legal instruments, currency arrangements and critical minerals partnerships - sometimes spectacular, more often quiet.

Africa holds approximately 30 percent of the world's mineral reserves, including deposits of cobalt, lithium, manganese, copper, platinum group metals and rare earth elements that are indispensable

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[1]United Nations (UN). 2025. "Secretary-General's Remarks at the 39th African Union (AU) Summit." Addis Ababa, February 2025.
[2]The Debrief Network. 2025. "The New Scramble for Africa's Critical Minerals." Available: https://www.thedebriefnetwork.com/p/the-new-scramble-for-africas-critical [March 2026].
[3]Africa Center for Strategic Studies. 2024. "Africa's Critical Minerals at a Critical Juncture." Available: https://africacenter.org/spotlight/africas-critical-minerals-at-a-critical-juncture/ [March 2026].
[4]BISI. 2025. "Global Scramble for Africa's Critical Minerals Drives New Era for Energy and Trade." Available: https://bisi.org.uk/reports/global-scramble-for-africas-critical-minerals-drives-new-era-for-energy-and-trade [March 2026].
[5]Mail & Guardian. 2026. "The Second Scramble for Africa." 13 March. Available: https://mg.co.za/thought-leader/opinion/2026-03-13-the-second-scramble-for-africa/ [March 2026].
[6]Ibid.

to the green and digital transitions.[7] Global demand for these resources is expected to triple by 2030.[8] Africa, in objective terms, has leverage. The question - urgent and unresolved - is whether it will use that leverage strategically, or whether the continent will, once again, supply raw inputs while others capture the higher-value stages of production.

The Geopolitical Stakes

The major powers are not waiting. The US, the EU, China and Gulf states are all competing for access to Africa's mineral wealth - each through a distinct strategic logic, and each with significant implications for the continent.

China moved earliest and most comprehensively. Landmark agreements such as the 2007 Sicomines resource-for-infrastructure deal in the DRC gave Chinese companies early and durable access to copper and cobalt in exchange for infrastructure investment. More recently, Chinese firms have invested over $1.4 billion in Zimbabwean lithium projects since 2022. Controlling mines is one thing; controlling the refining technology required for high-tech manufacturing is another entirely - and it is the latter that gives Beijing significant and durable influence over global supply chains. China has also removed tariffs on goods from 53 African countries, a move characterised by analysts as soft diplomatic power designed to present Beijing as a long-term, conditions-free trading partner. Whether that narrative holds over time is open to debate; strategically, it matters.

The US has approached the same challenge through a security-driven framework, prioritising supply chain de-risking from China above all else. The result, in the African context, has been transactional and at times coercive - as the DRC arrangement illustrates. The EU's approach has been more institutionally oriented, embedding resource access within partnership frameworks that include sustainability commitments and infrastructure co-investment. Yet even the EU's model, premised on reciprocity, must be scrutinised: the terms of cooperation are still largely set in Brussels, not Kinshasa or Windhoek.

Taken together, these dynamics represent what the South African Institute of International Affairs (SAIIA) has described as a new era of critical minerals diplomacy - one in which Africa faces both heightened leverage and heightened risk simultaneously.[9]

The Familiar Trap

The risks are not hypothetical. Previous eras of natural resource extraction from Africa contributed to what scholars term the resource curse - a pattern in which countries with abundant natural resources tended toward greater autocracy, corruption and conflict while lagging in development.[10] Host communities of mining projects have routinely borne the costs: environmental degradation, health impacts, poor labour conditions and stagnant incomes. Despite generating significant

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[7] African Development Bank (AfDB) Group. 2024. Critical Minerals for Africa's Inclusive Growth and Development. Available: https://www.afdb.org/sites/default/files/documents/publications/critical_minerals_for_africas_inclusive_growth_and_development_lt.pdf [March 2026].

[8] Mail & Guardian. 2026. Op. cit.

[9] South African Institute of International Affairs (SAIIA). 2025. "The Art of the Deal: How Africa Should Play Its Cards in a New Era of Minerals Diplomacy." Available: https://saiia.org.za/research/the-art-of-the-deal-how-africa-should-play-its-cards-in-a-new-era-of-minerals-diplomacy/ [March 2026].

[10] Africa Center for Strategic Studies. 2024. Op. cit.

revenues, mineral extraction has not generally translated into sustained economic growth or broader improvements in human well-being.[11]

The same structural dynamics risk replicating themselves in the current moment. The US-DRC deal follows an established template in which a foreign power offers security or economic support in exchange for privileged resource access - with the burden of institutional adjustment falling on the African party. Analysts at Global Witness have described such arrangements as neocolonialism dressed up as economic cooperation.[12] Meanwhile, regional tensions between the DRC and Rwanda - partly fuelled by competition for control of mineral-rich territories in North and South Kivu - illustrate how mineral wealth, absent adequate governance, can deepen rather than resolve conflict.[13]

The retreat from environmental, social and governance (ESG) principles among major mining companies and their home governments compounds the danger. International mining companies ranked ESG as their top business risk in 2024. Yet by 2025, investors' focus had shifted away from community impact toward narrower environmental metrics - and governance concerns were being deprioritised altogether, a trend analysts at EY described as raising *"alarm bells."*[14] If the global ESG agenda continues to weaken precisely as the scramble for Africa's minerals intensifies, the communities bearing the social and environmental costs of extraction will have even less protection.

The fragmentation of Africa's response makes this more acute. Fifty-five states negotiating separately, mineral agreements signed in isolation, no unified position on value addition or safeguards - this is not a strategy. It is an invitation.

The Frameworks Exist; The Political Will Must Follow

It would be incorrect to suggest that Africa lacks institutional architecture. The Africa Mining Vision (AMV), adopted in 2009, provides a framework for transparent, equitable and optimal mineral exploitation oriented toward sustainable development and value addition. The Addis Ababa Declaration reinforced the shift toward industrialisation, stronger governance and local content requirements.[15] The African Minerals Development Centre (AMDC) was established in 2013 to coordinate implementation. Agenda 2063 affirmed minerals as central to continental transformation. More recently, the African Green Minerals Strategy (AGMS), adopted by the AU in 2023, aligns the minerals agenda with green industrialisation and the Sustainable Development Goals (SDGs).[16]

These frameworks are not inadequate. They are under-enforced. Enforcement of fair tax regimes, beneficiation requirements and local value addition in mining contracts remains weak. Efforts to integrate the minerals agenda into industrial and trade policy have stalled. The African Development Bank (AfDB), in its Critical Minerals Insight Series, has been frank about the gaps: what is required is a combination of strong governance, infrastructure development, access to technology and targeted investment - as well as greater international cooperation through platforms such as the Group of Twenty (G20).[17]

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[11]Atlantic Council. 2024. "In the Scramble for Africa's Critical Minerals, the West Must Not Abandon the ESG Agenda." Available: https://www.atlanticcouncil.org/blogs/africasource/in-the-scramble-for-africas-critical-minerals-the-west-must-not-abandon-the-esg-agenda/ [March 2026].
[12]SAIIA. 2025. Op. cit., citing Emily Iona Stewart, Global Witness.
[13]BISI. 2025. Op. cit.
[14]Atlantic Council. 2024. Op. cit., citing EY Global Mining Survey 2025.
[15]Mail & Guardian. 2026. Op. cit.
[16]BISI. 2025. Op. cit.
[17]African Development Bank Group. 2024. Op. cit.

The African Continental Free Trade Agreement (AfCFTA) offers a complementary instrument. A functioning continental free trade area creates the internal market depth needed to support regional value chains in battery minerals, processing and manufacturing. The DRC-Zambia battery corridor - pairing the DRC's cobalt and copper with Zambia's processing capacity and clean hydropower - is a concrete example of what regional industrial cooperation could look like in practice.[18] Indonesia's decision to ban the export of unprocessed nickel - a policy that attracted international arbitration but ultimately catalysed domestic processing investment - offers a comparable lesson from outside the continent: leverage works when it is applied consistently and backed by a credible industrial strategy.[19]

Africa as Rule-Maker, Not Rule-Taker

The cautiously optimistic reading of this moment is not naive. It is grounded in a structural reality: the world urgently needs Africa's minerals. That urgency creates leverage. But leverage unused is leverage lost - and the window for translating resource endowment into industrial transformation is not indefinite.

Several African governments are already acting on this understanding. Zimbabwe has banned the export of unprocessed lithium. Tanzania prohibits the export of non-value-added minerals. Ghana, Namibia, Botswana and others have implemented or strengthened national preference policies in the mining sector.[20] South African President Cyril Ramaphosa has publicly stressed the imperative of moving beyond raw material exports toward higher-value processing - language echoed at the AU level and increasingly in bilateral engagements.[21]

What is missing is the collective discipline to translate these individual assertions of sovereignty into a unified continental negotiating position. SAIIA has argued for strategic neutrality - a non-aligned minerals policy in which African countries work with whichever partner offers the best terms on investment, infrastructure, value addition and technology transfer, without becoming entangled in great power bloc dynamics. This is sound counsel. But strategic neutrality without agreed minimums - on local content, on community benefits, on environmental standards, on intergenerational equity - risks becoming merely the absence of a strategy.[22]

What is needed is coordination, not uniformity. Africa does not require all fifty-five member states to adopt identical policies. It requires agreed baseline principles: that no deal will be signed that does not embed meaningful beneficiation commitments; that infrastructure built for mineral export must serve local populations; that revenue flows must be transparent; that communities bearing environmental costs must receive demonstrable benefits. The ideal outcome - articulated by analysts such as Ziyanda Stuurman at Africa Practice - is a collective understanding of what a minimum trade deal should entail, such that no single country can be isolated and pressured into accepting terms that undermine the continent as a whole.[23]

This requires political will of a quality that has sometimes been absent. Too many mineral agreements have been signed by governments facing immediate fiscal pressure, without adequate consideration of long-term consequences. The AMV and the AGMS provide the normative architecture; the AU and the Southern African Development Community (SADC) provide the

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[18] African Development Bank Group. 2024. Op. cit.
[19] SAIIA. 2025. Op. cit.
[20] Atlantic Council. 2024. Op. cit.
[21] The Debrief Network. 2025. Op. cit.
[22] SAIIA. 2025. Op. cit.
[23] Ibid.

institutional forums; the AfCFTA provides the economic incentive structure. The missing ingredient is the commitment of African leaders to prioritise continental development over the short-term attractions of bilateral deal-making on external terms.

Conclusion

History does not reward potential. It rewards organisation and resolve. Africa successfully dismantled one form of external domination. It must now demonstrate the collective discipline to resist another - one that arrives not with armies but with contracts, not with flags but with right-of-first-offer clauses.

The geopolitical flux of this moment is, counterintuitively, an asset. A world in which the US, the EU, China and Gulf states all urgently require what Africa holds is a world in which Africa has room to set terms. The continent's task is not to choose sides in a great power competition. It is to insist, collectively and consistently, on being a rule-maker in the green economy rather than a supplier to it.

The Addis Ababa Declaration reinforced this imperative. The AGMS provides the framework. The AfCFTA creates the market. What the moment demands now is leadership - the kind that converts declarations into binding commitments, frameworks into enforceable contracts, and potential into transformation. Africa has, in the words of the Amani Africa Institute, never mattered more. The question is whether it will matter on its own terms.[24]

[24]Amani Africa Institute. 2025. "Africa and the New Scramble: A Call for Urgent Continental Action." Available: https://amaniafrica-et.org/africa-and-the-new-scramble-a-call-for-urgent-continental-action/ [March 2026].

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The Southern African Liaison Office (SALO) is a South African-based not-for-profit civil society organisation which, through advocacy, dialogue, policy consensus and in-depth research and analysis, influences the current thinking and debates on foreign policy especially regarding African crises and conflicts.

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