ONE VOICE.
ONE STRATEGY.

A Continental Blueprint for African Strategic Minerals, Joint Industrial Policies, and Diplomacy

SARW
Southern Africa Resource Watch

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A report by

Southern African Resource Watch

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Published: September 2026

ISBN: 978-1-7764396-9-0

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Design, layout and cover: Xealos (PTY) Ltd

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Acknowledgements

The *Southern Africa Resource Watch (SARW)* gratefully acknowledges Fadhel Kaboub *(Another Development)*, the report's lead author, for his research, analysis and preparation. SARW also acknowledges Claude Kabemba and Davie Malungisa, whose guidance, insights, and expertise helped develop the report.

SARW sincerely thanks everyone who participated in the *High-Level Expert Roundtable on Africa's Critical Minerals and Just Energy Transition Diplomacy*, held in Magaliesburg, South Africa, on 25–26 March 2026. The roundtable perspectives and expert contributions informed and strengthened this report.

SARW aims to promote the responsible use of natural resources in Africa by engaging stakeholders inclusively and safeguarding human rights, the environment, and biodiversity. As demand for critical energy-transition minerals rises, achieving equitable, resource-driven industrialisation remains central to this mission.

Forewords

Graça Machel

Founder, Graça Machel Trust
Founder and President, Foundation for Community Development (FDC), Mozambique

Africa stands at a historic moment: an opportunity to break free from the colonial legacy of extraction and dependency and to enter a new era of sovereignty, economic transformation, and equal partnership in developing our mineral resources.

The global transition towards renewable energy, new technologies and sustainable production is reshaping the world economy. Africa has many of the resources, people and possibilities that will shape this transformation.

But resources alone do not constitute development. The true measure of progress is whether Africa exercises sovereignty over its resources and whether economic transformation improves the dignity, opportunity and wellbeing of African people.

This is why *One Voice, One Strategy* matters.

The Blueprint offers Africa an opportunity to pursue industrialisation differently: not as a race to extract and export more resources, but as a collective effort to create value, decent work, technological capacity and shared prosperity. It places Africa's critical minerals within a broader vision of industrial transformation, regional cooperation and sustainable development.

At the heart of this transformation must be people — especially women, young people, people with disabilities, and communities living closest to Africa's natural resources. Gender equality cannot be an afterthought to industrialisation. Women must be recognised not merely as beneficiaries of development, but as economic actors, entrepreneurs, workers, scientists, leaders and decision-makers. Education must be at the heart of this transformation, ensuring that every child and young person has the knowledge, skills and opportunity to shape Africa's future. Communities must have a meaningful voice in decisions that affect their land, livelihoods, environment and future.

We have a responsibility to build an economy that serves those living today while safeguarding the resources, environment, knowledge and opportunities of generations yet to come. This is the essence of an intergenerational contract: to ensure that the choices we make today expand, rather

than diminish, the possibilities available to Africa's children and future generations.

Africa now has the opportunity to develop an economy that avoids repeating past inequalities and dependencies. We need to assert sovereignty and truly own our natural resources, breaking the colonial cycle where Africa supplies raw materials while the value, technology, and prosperity are generated elsewhere.

Giving away our resources through weakly negotiated contracts and deals is no longer an option.

Africa's resources are vital to the world, offering an opportunity and a duty to adopt new negotiation approaches. Africa should leverage its collective strength to demand fairness, justice, and equitable partnerships. Sovereignty over natural resources is essential for driving industrial growth, adding value, and transforming the economy. Enhancing cooperation among African nations and fostering equal, mutually beneficial relationships with both the Global South and North are crucial, with a focus on Africa's development priorities.

We can pursue development that respects nature, protects human dignity and ensures that the wealth generated from Africa's resources contributes to the wellbeing of its people.

This calls for courage, unity, and a collective continental goal. It requires strong leadership and the sacrifice exemplified by previous generations of Africans in freeing our continent. Today, that same resolve and urgency should focus on economic emancipation: gaining control over our resources, developing African industries, generating opportunities for our people, promoting gender equality, and ensuring that Africa's resources benefit Africa's development.

One Voice, One Strategy goes beyond just an industrial policy framework. It encourages envisioning an Africa that takes active control and management of its resources, stresses the importance of creating rather than just supplying, supports negotiation over passivity, and prioritises human dignity and environmental sustainability in development.

Africa has a landmark opportunity. We need the bravery, insight, and solidarity to honour those who fought for our political freedom by achieving our economic independence.

Graça Machel

Founder, Graça Machel Trust
Founder and President, Foundation for Community Development (FDC) Mozambique

Dr Claude Kabemba

Executive Director, Southern Africa Resource Watch

Africa enters a new geopolitical era with resources of extraordinary strategic importance. Critical minerals are increasingly central to the global energy transition, electrification, digital infrastructure and the technologies that will shape the twenty-first century. Yet the central question is not whether Africa possesses these resources. It is whether Africa will exercise the political, economic and diplomatic agency necessary to determine how they are used.

One Voice, One Strategy speaks directly to this challenge.

This report is clear: For too long, African countries have negotiated separately in global markets characterized by concentrated economic and technological power. Fragmentation diminishes our bargaining strength, encourages competition among African countries and makes it harder to build integrated regional value chains. The Blueprint therefore makes a compelling case for collective action: coordinated industrial policies, regional value chains, common negotiating principles and a stronger African diplomatic voice.

But African agency must begin at home.

Strong state institutions, accountable governance and effective public policy are essential if mineral wealth is to become a foundation for industrial transformation. At the same time, no strategy can succeed if it excludes the communities whose lands, livelihoods and environments carry the costs of extraction. Development must therefore be governed in the public interest, with meaningful participation, protection of rights, transparency and accountability.

The geopolitical moment also demands wisdom.

Africa should neither retreat from the world nor allow itself to be absorbed into new forms of dependency. The objective should be mutually beneficial partnerships in which Africa negotiates from a position of collective strength – securing investment, technology transfer, productive capacity and knowledge while retaining the policy space necessary to pursue its own development priorities.

This requires bold leadership, strategic wisdom and the willingness to act together in the collective interest. The liberation of our continent was achieved because generations of Africans understood that freedom required sacrifice, solidarity and a shared sense of purpose. Economic transformation demands the same resolve.

Africa must now turn political independence into meaningful economic agency.

We have an opportunity to reshape the terms on which Africa engages the world – not through confrontation, isolation or exclusion, but through unity, strategic action and partnerships founded on mutual respect and shared prosperity.

One Voice, One Strategy is ultimately a call to action: for stronger African states, empowered communities, accountable institutions and a continent confident enough to negotiate its future on its own terms.

The continent has the resources. It has the people. It has the markets. What is required now is the political will, institutional capacity and collective wisdom to act together.

One Voice. One Strategy.

Dr Claude Kabemba
Executive Director, Southern Africa Resource Watch

Executive Summary

Africa stands at the most consequential geopolitical and economic crossroads since the end of formal colonialism. The global transition toward renewable energy, electrification, digital infrastructure, and artificial intelligence has triggered an unprecedented race to secure Critical Energy Transition Minerals (CETMs) such as cobalt, copper, lithium, manganese, graphite, nickel, platinum group metals, and rare earth elements. These minerals are no longer ordinary commodities. They have become the strategic foundation of the twenty-first-century global economy.

No region is better positioned than Africa. The continent possesses an extraordinary share of the world's critical mineral reserves, the youngest and fastest-growing population on the planet, immense renewable energy potential, expanding consumer markets, and a strategic geographic position connecting Asia, Europe, and the Americas. Taken together, these assets give Africa all the ingredients required to become one of the world's leading industrial and economic powers.

Yet Africa remains in the lowest tiers of the global economy. This is not due to a lack of resources, talent, or ambition. It reflects the persistence of an economic structure established during the colonial era that assigned Africa three enduring functions: supplying cheap raw materials, consuming manufactured products and technologies produced elsewhere, and serving as a destination for obsolete technologies and low value-added manufacturing assembly activities.

The current global energy transition risks reproducing this same model under the banner of "green" development, leaving Africa once again as the supplier of strategic minerals while higher value-added industrialisation – including refining, advanced manufacturing, research, technology ownership, and intellectual property – remain concentrated elsewhere.

Africa has rejected this model before. Over the past five decades, African leaders have produced an impressive body of strategic thinking, from the Lagos Plan of Action and the Abuja Treaty to Agenda 2063, the Africa Mining Vision (AMV), the African Continental Free Trade Area (AfCFTA), and most recently the Africa Green Minerals Strategy (AGMS). These frameworks consistently call for industrialisation, regional integration, value addition, technological upgrading, and structural transformation.

The challenge, therefore, is not the absence of vision. It is the absence of coordinated implementation.

This Blueprint proposes **One Voice, One Strategy** as the operational framework that transforms decades of African aspirations into a coherent continental industrial strategy.

Its central proposition is straightforward:

No African country can industrialise alone. Africa can.

Individually, African countries often lack the market size, infrastructure, industrial capabilities, financial resources, and bargaining power needed to build globally competitive industries. Collectively, however, Africa possesses an unparalleled combination of strategic minerals, renewable energy resources, entrepreneurial talent, scientific capacity, growing markets, and geopolitical leverage. Acting together allows African countries to create the economies of scale, regional specialisation, and integrated value chains necessary for genuine industrial transformation. Acting together, they can also ensure a different kind of industrial model that centres uniform environmental and social priorities and production for prudent use for essential needs.

This Blueprint therefore calls for African countries to coordinate industrial policy, mineral policy, trade policy, social and environmental safeguards, infrastructure planning, energy systems, financing mechanisms, diplomacy, and technology partnerships under a common continental framework. Rather than competing against one another for investment through fragmented national policies, African countries should negotiate collectively, coordinate strategically, and industrialise cooperatively.

The objective is not simply to process more minerals inside Africa. Critical Energy Transition Minerals are not the destination; they are the strategic leverage through which Africa can build integrated regional industrial ecosystems spanning battery technologies, electric mobility, renewable energy equipment, electrified rail systems, green steel, mining equipment, advanced materials, clean cooking technologies, recycling industries, digital infrastructure, and future African manufacturing champions.

This strategy deliberately moves beyond individual mining projects toward continent-wide industrial ecosystems. Different countries will specialise according to their particular strengths and conditions, while participating in shared regional value chains that create employment, stimulate technological learning, strengthen intra-African trade, and increase Africa's collective standing in global markets.

Achieving this transformation requires coordinated public and private investment in productive infrastructure, affordable renewable energy, transportation corridors, research and development, technical education, engineering, digital infrastructure, and industrial finance. African development finance institutions, sovereign wealth funds, pension funds, public investment banks,

private investors, entrepreneurs, and manufacturers all have essential roles to play. An equally important inclusive governance framework must safeguard labour rights, community participation, environmental stewardship, transparency, and accountability, ensuring industrialisation that delivers broad-based prosperity rather than new forms of extraction.

Crucially, this approach calls for a redefinition of development itself. It moves beyond simple economic growth to prioritise human well-being, economic sovereignty and environmental stewardship. By firmly planning industrialisation with social justice, decent work, and ecological sustainability at the core, Africa can build economies that serve Africa's genuine needs rather than reproduce dependency.

As a practical tool, the Blueprint also introduces an **African Just Term Sheet** to guide negotiations with external partners. Rather than negotiating investment projects individually, African countries should establish common continental principles governing technology transfer, local value addition, financing arrangements, environmental standards, labour protections, community rights, transparency, local currency solutions where appropriate, and long-term industrial development. Such a framework would strengthen Africa's collective bargaining position while providing greater certainty for responsible investors committed to mutually beneficial partnerships.

Source: © Shutterstock

To coordinate implementation, the Blueprint proposes establishing a **Pan-African Secretariat for Structural Transformation, Diplomacy, and Strategic Partnerships**. Working alongside the African Union, Regional Economic Communities, the AfCFTA Secretariat, development finance institutions, academia, civil society, and the private sector, the Secretariat would support joint industrial planning, coordinate implementation, monitor progress, mobilise technical expertise, and strengthen Africa's collective diplomatic engagement.

At the heart of this Blueprint lies a broader geopolitical vision: the **Geopolitical Bargain of the Century**. For the first time in generations, Africa possesses a unique combination of strategic assets that gives the continent genuine bargaining power within an evolving global order. By negotiating collectively rather than individually, Africa can leverage its critical minerals, renewable energy potential, expanding markets, and industrial opportunities to secure technology transfer, productive investment, fair financing, and long-term industrial partnerships on terms that advance African development priorities rather than perpetuate extractive dependence.

This opportunity, however, will not remain open indefinitely. Global supply chains are rapidly taking shape. Processing capacity is expanding. Technological substitution, recycling, and material innovation will gradually reduce Africa's leverage. Decisions taken during this decade will shape the global industrial order for generations.

Africa therefore faces a historic choice. It can continue competing as fragmented exporters of raw materials, reinforcing the economic structures inherited from colonialism. Or it can act collectively to build integrated regional industries, strengthen its geopolitical influence, and reposition itself as one of the principal architects of a new international economic order based on industrial transformation, shared prosperity, and genuine development.

One Voice, One Strategy is not another African vision. It is an implementation blueprint.

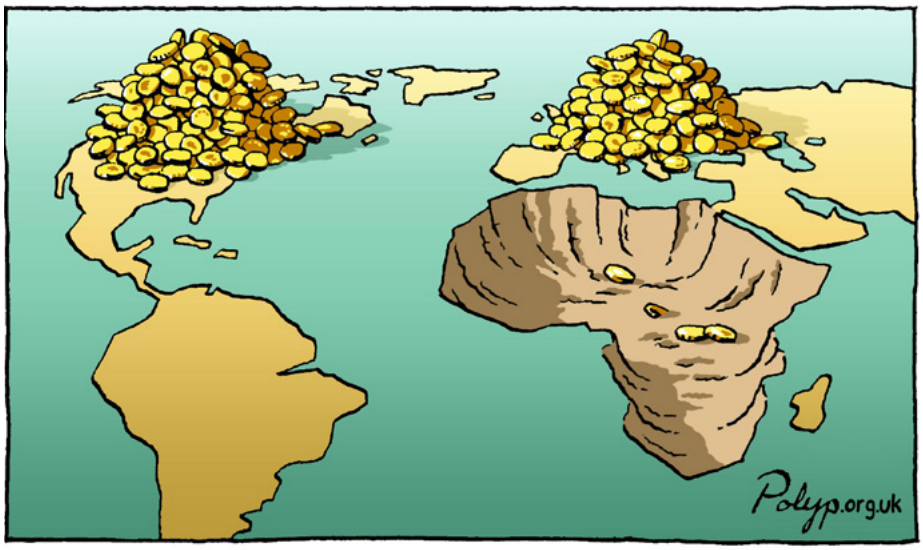
The opportunity is historic. The window is finite. The time to act is now.

1. Setting the Scene for Africa's *One Voice, One Strategy* Blueprint

Africa is by far the richest continent on earth in terms of mineral resources. In terms of its size, one can fit China, India, the United States, and Western Europe in Africa with some room to spare. Demographically, Africa has the youngest population in the world (UN-DESA, 2024). Africa has a population size similar to China's and will become the world's largest consumer market by the end of this century.

However, in terms of economic and geopolitical weight, Africa remains trapped at the bottom of the hierarchy because of three persistent economic roles imposed on the continent. First, Africa was positioned as a supplier of cheap raw materials for the industrialised world. Second, Africa was positioned to be the consumer (not the producer) of industrial output and technologies from the industrialised world. And third, Africa was positioned to be the recipient of obsolete technologies and low-cost assembly line manufacturing that the industrialised world no longer needs but wants to ship to Africa under the guise of "development cooperation and partnership", when in fact this is meant to be intentional economic entrapment.

Figure 1: Neocolonial Extraction of Resources and Wealth from Africa



Source: Polyp.org.uk

The logic behind this *One Voice, One Strategy* blueprint is simple:

a. Africa as a continent (not as individual countries) **has all the material, demographic, geographic, and geological factors** it needs to become a global economic powerhouse.

b. African thinkers and diplomats have produced and continue to produce **high-quality strategic plans** for structural transformation (Agenda 2063, AVM, AGMS, AfCFTA, etc.).

c. **No country in Africa can industrialise alone** (without economies of scale, availability of critical inputs, privileged access to global markets, affordable external financing, etc.).

d. Africa as a continent has an **enormous collective economic weight** as a major supplier of critical raw materials, as a major consumer market, as potentially the producer of the cheapest clean energy in the world, and as a potential central hub of logistics and rail/air/sea transport superhighways to all major economic blocs on the planet.

e. Africa's collective economic weight can **translate Africa's *potential* into real powerful geopolitical power** that gives the continent a much stronger negotiation capacity to get more favourable terms in bilateral and multilateral spaces on debt, climate, trade, investment, finance and environment, as well as peace and security matters globally.

f. Africa's geopolitical bargaining chip will not exist without a critical mass of African Heads of State coming together to activate the formation of **highly coordinated joint industrial policies** to leverage the continent's Critical Energy Transition Minerals (CETMs) on African terms (Albertone & Lebdioui, 2026).

g. Africa must take the lead on a **new kind of industrialisation that doesn't reproduce the injustice, extraction, and hierarchies of the current industrial system.** Africa's model must be considerate, sustainable, and compassionate. Industrialisation will work for African people only if it protects the rights of nature, people, labour, and frontline communities, advances social justice and sufficiency, and follows an ethos of equity and genuine sustainability (see Box 1, on *Another Development*).

h. The speedy implementation of the *One Voice, One Strategy* blueprint must take shape with the **full support and ownership** of the African people.

Therefore, this document is a call to action addressed to African Heads of State (as well as senior officials and diplomats and stakeholders) to create a competent Secretariat with diplomatic support and a mandate to convene Cabinet-level conversations to unpack each ministry's role and technical

expertise in executing the *One Voice, One Strategy* blueprint and to coordinate the technical execution of a continental joint industrial strategy. The core vision is provided in the document, but initial, additional technical, diplomatic, and logistical details on its implementation are already being advanced by a small team of African experts working with the broader network of like-minded think tanks, academics, policy experts, and civil society organisations (SARW, 2026).

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Box 1

Another Development: A Framework for Structural Transformation and Ecological Sustainability

Africa is at an historic geopolitical and economic moment. A rapidly changing global context, combined with Africa's endowment of critical minerals – as building blocks of the 21st century economy – presents an opportunity to advance structural transformation responding to the continent's own development priorities and aspirations. Now is the moment to critically evaluate mainstream models of development, and the path Africa wants to chart going forward.

Mainstream models of development have failed to deliver on their promise. Across the Global South, countries remain locked at the bottom of the value chain. Dependence on primary commodities, cash-cropping and low-value-added manufacturing have left countries vulnerable to external shocks, environmental degradation, and persistent structural inequalities. Meanwhile, many wealthy nations face crises of mal- and overdevelopment: growing inequality, political fragmentation, declining social cohesion, and accelerating climate instability.

Africa has an opportunity to lead the world in delivering more genuine development. Building on African frameworks such as Agenda 2063, and a long history of endogenous ideas and intellectual leadership in the Global South, Africa can renew engagement with "alternative development" approaches that challenge mainstream assumptions, and reflect the specific cultural, historic, economic, ecological, and other conditions of each society in Africa.

Many of these ideas were captured by African and other Global South thought leaders in the report *What Now: Another Development,* published in 1975 for the special session on Development at the UN General Assembly — one year after the UN General Assembly resolution on the establishment of a New International Economic Order (NIEO) and at a time when the Global South was asserting itself with confidence, and unprecedented unity.

The report concluded that:

> "[D]evelopment is a whole; it is an integral, value-loaded, cultural process; it encompasses the natural environment, social relations, education, production, consumption and well-being. The plurality of roads to development answers to the specificity of cultural or natural situations; no universal formula exists. Development is endogenous; it springs from the heart of each society, which relies first on its own strength and resources and defines in sovereignty the vision of its future, cooperating with societies sharing its problems and aspirations" (Nerfin et al., 1975).

In addition to the principle of endogenous development, other core principles of *Another Development* highlighted that development must: a) provide **basic needs**, equity, and well-being for all; b) respect the **ecological "outer limits"** (the idea of planetary boundaries several decades ahead of its time); and c) ensure that development must advance **self-reliance** in the sense of cooperation and exchange with others, but without placing food, energy, and other critical systems at the mercy of external commercial or geo-political forces. It also highlighted the notion of "**collective self-reliance**" as key for exercising collective power to change the current economic and political world order. A concluding principle underscored the need to understand that **all societies** would need to undergo deep transformations — and that there are no "developed" societies.

Applied to Africa's critical minerals agenda, this framework suggests that policy objectives should not be centred on traditional industrialisation with its misguided notions of "modernisation" or "catching up" to developed countries. Rather, a holistic strategy can leverage Africa's key resources and political influence, with economic cooperation and sustained collective action at its core. Such a different kind of industrialisation can deliver more balanced, endogenous and ecologically sustainable development embodied in the concept of *Another Development* to achieve Africa's long-term development aspirations.

2. Africa's CETMs Moment: From Extractivism to Strategic Leverage

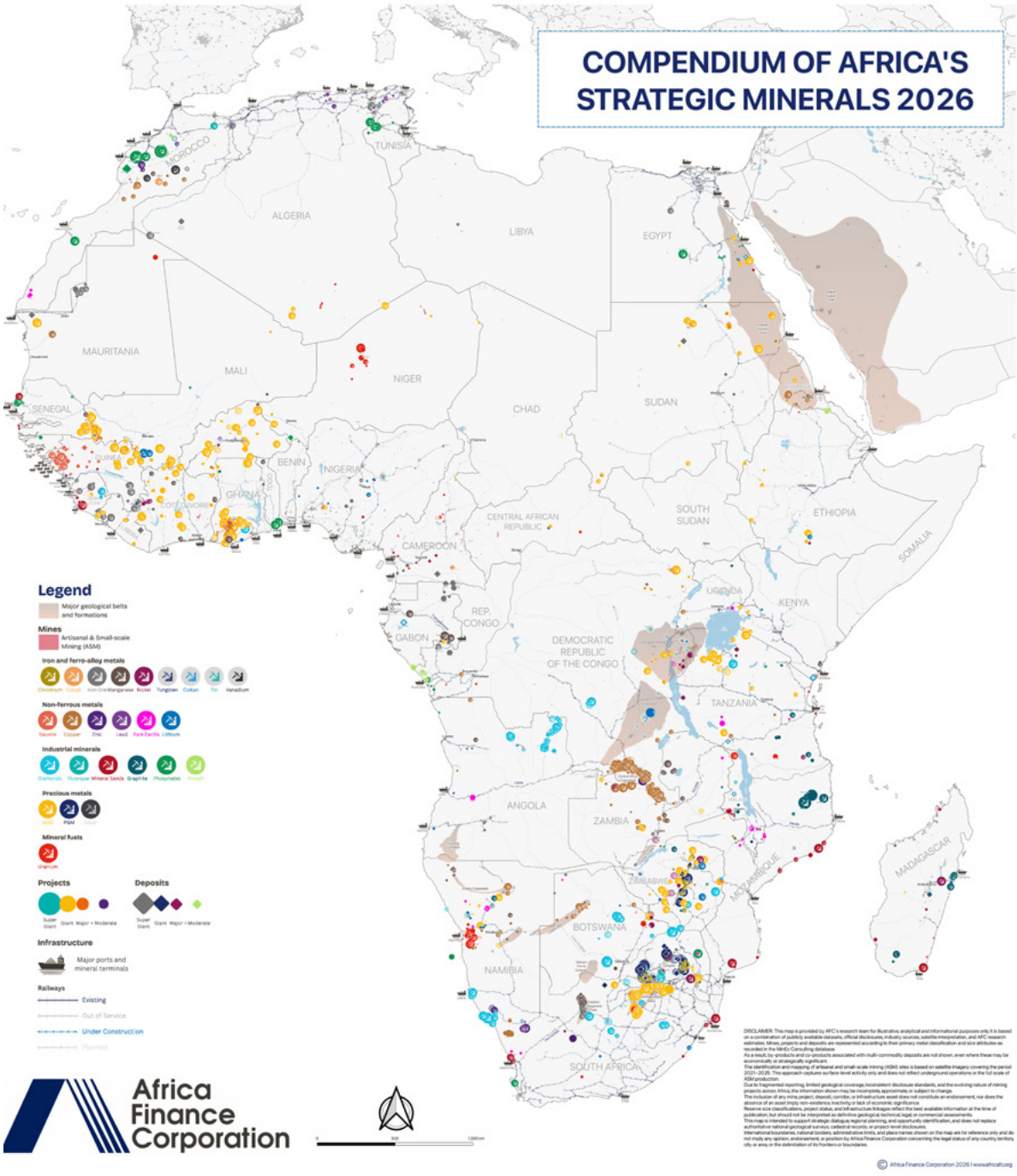
The political economy of minerals is shifting rapidly, driven by geopolitical, economic and technological factors, including notably the global energy transition. Technologies central to decarbonization and clean energy such as electric vehicles, grid-scale batteries, renewable energy systems, and digital infrastructure all depend on a set of minerals now widely referred to as **Critical Energy Transition Minerals (CETMs).** Lithium, cobalt, nickel, manganese, graphite, rare earth elements, and copper have become strategic resources for the 21st century energy system. In addition, CETMs are key inputs in the most strategic sectors that will govern the global economy in the 21st century, including energy-hungry Artificial Intelligence (AI) infrastructure, telecommunications infrastructure, high-tech products, and military equipment.

Demand for these minerals is expected to grow dramatically over the coming decades as countries attempt to electrify transportation systems, expand renewable energy generation, and upgrade electricity grids. Governments and corporations across the Global North and the rest of the industrialised world are therefore racing to secure stable supply chains for these inputs. The result is an emerging geopolitical scramble for control over mineral reserves, processing capacity, and manufacturing ecosystems.

Africa sits at the centre of this transformation with two possible roads to take. One road circles back to the same colonial and neocolonial economic entrapment and greenwashed extractivism (Sokona et al, 2023; Kaboub & Adow, 2026), and the other along which Africa charts its own pathway for green industrialisation, just transition, and sustainable prosperity on its own terms under the *One Voice, One Strategy* vision (Sweeney, 2023). Green industrialisation offers an opportunity to leapfrog toward an industrialised economy by avoiding the flawed, carbon-intensive, and resource-inefficient development trajectories historically followed by other regions (Nerfin et al., 1975; Frank, 1967; Furtado, 1964; Prebisch, 1950).

The continent holds a significant share of the world's known reserves of several CETMs. The Democratic Republic of Congo (DRC) accounts for most global cobalt production. Southern Africa contains major deposits of platinum group metals, manganese, and nickel. Lithium resources are available across the DRC, Malawi, Ghana, Namibia, Zimbabwe, and other parts of the region. Graphite deposits in Mozambique and Tanzania are increasingly important for battery manufacturing. Copper belts spanning Zambia and the DRC remain critical to global electrification.

Figure 2: Compendium of Africa's Strategic Minerals 2026



Source: Africa Finance Corporation (2026).

Yet, as discussed above, Africa's colonial trap persists: **Africa supplies strategic minerals but captures only a fraction of their economic value** (Kaboub, 2026a). The fundamental problem is the nature of Africa's neocolonial role within the global economy. The continent continues to participate in global markets on terms that maximise value creation elsewhere while limiting domestic value capture, technological learning, and productive diversification. Breaking this pattern requires more than incremental industrial policies; it requires a deliberate strategy to reposition Africa higher in regional and global value chains.

What is important for African Heads of State (and all relevant stakeholders) to recognise is that the colonial economic functions that were imposed on the continent were never designed to deliver development, justice, democracy, human rights, peace, or any of the Sustainable Development Goals (SDGs) for that matter. So why do we expect the same economic model to somehow produce development and industrialisation, or a just transition in Africa today? It cannot, by design (Adedeji, 1981; Amin, 1973; Ndlovu-Gatsheni, 2013; Nkrumah, 1965; Ngũgĩ wa Thiong'o, 1986; Rodney, 1972).

Across the continent, mineral extraction has historically been organised around an **enclave model of development**. Mining operations generate foreign exchange and fiscal revenues, but they often remain disconnected from broader domestic economic transformation (Kaboub, 2026a). Mining on the continent is delinked from the rest of the national economies and does not support local manufacturing. Value-added activities such as refining, component manufacturing, and high-technology production are overwhelmingly located outside the continent. It is not surprising, therefore, that manufacturing capacity and employment creation are modest relative to the scale of mineral wealth (Lebdioui, 2024).

The emerging global energy transition risks reproducing this historical pattern under a new label of "**green" extractivism**. Under this scenario, Africa would once again serve primarily as a supplier of raw materials for industrialisation elsewhere. Minerals would leave the continent largely unprocessed, while the most profitable segments of the value chain—advanced manufacturing, technology development, and intellectual property—would remain concentrated in industrialised economies. This outcome is neither inevitable nor acceptable.

This moment represents a once-in-a-generation strategic opportunity for Africa to reshape its position in the global economy. The energy transition is still unfolding. Supply chains are still being built. Industrial ecosystems around battery technologies, renewable energy infrastructure, and electric mobility remain under construction (Sokona et al., 2023). Decisions made during this window will shape value distribution across these supply chains for decades to come.

However, the window for strategic action will not remain open indefinitely. Technological substitution, material efficiency improvements, and expanded recycling could reduce long-term mineral demand growth. Processing capacity is rapidly expanding in several major economies. Once global supply chains become fully entrenched, Africa's bargaining power may decline significantly. In other words, **Africa's leverage is real, but it is time-bound.**

To translate mineral endowment into sustainable prosperity, African countries must move beyond a narrow focus on extraction and adopt a comprehensive strategy that links mineral resources to industrial development, technological upgrading, and structural transformation.

This requires coordinated policy action across three interconnected dimensions:

Value-chain development, including mineral processing, refining, and manufacturing;

Regional economic integration, enabling scale and specialisation across African markets;

Collective diplomatic engagement, strengthening Africa's bargaining position within global CETMs governance.

This Blueprint outlines how these elements can be integrated into a coherent continental strategy that transforms Africa's mineral wealth into a foundation for long-term development.

3. Foundational Policy Anchors: AMV, AGMS, and National Strategies

Africa is not starting from scratch in developing a strategic approach to mineral resources. Over the past two decades, the continent has produced a series of policy frameworks that collectively articulate a clear vision for mineral-led development fully integrated into the African Union's **Agenda 2063**.

Three pillars are particularly important for the present Blueprint: the **Africa Mining Vision (AMV),** the **Africa Green Minerals Strategy (AGMS)**, and a growing set of **national CETMs strategies** adopted by individual African countries (AU, 2009; AU, 2011; AMDC, 2015; AUC, 2019; AUC, 2025a). Together, these frameworks demonstrate that Africa already possesses a coherent intellectual and policy foundation for transforming its mineral sector. The challenge today is not the absence of strategy, but the lack of continental coordination and effective implementation **mandated by the highest political authorities: African Heads of State**.

3.1 The Africa Mining Vision: Minerals for Structural Transformation

Adopted in 2009 by the African Union, the Africa Mining Vision remains the continent's most comprehensive framework for rethinking the role of mineral resources in development. At its core, the AMV rejects the traditional model of enclave extraction and instead calls for **minerals-based industrialisation**. The Vision emphasises the need to integrate mining activities into broader economic development strategies through the creation of multiple economic linkages. These include:

a. **Upstream linkages**, involving the development of local supplier industries providing goods and services to mining operations;

b. **Downstream linkages**, including mineral beneficiation, refining, and manufacturing based on mineral inputs;

c. **Sidestream linkages**, such as infrastructure development, energy systems, and logistics networks that support mining and other sectors;

d. **Lateral migration**, whereby capabilities developed in mining-related industries spill over into other areas of the economy;

e. **Public Private Partnerships (PPPs) and Community Public Private Partnerships (CPPPs)**: Mutually beneficial partnerships between the state, the private sector, civil society, local communities and other stakeholders;

f. **Geo-knowledge**: A comprehensive knowledge of its mineral endowment.

The AMV also highlights the importance of **regional cooperation** in achieving these objectives. Many African countries lack the domestic market size or industrial base necessary to support large-scale mineral processing and manufacturing. Regional integration, therefore, becomes essential for building viable value chains. More than a decade after its adoption, however, the transformative potential of the AMV remains only partially realised. In many cases, implementation has been constrained by fragmented national policies, limited industrial capabilities, and intense global competition for investment in the mineral sector. The rise of CETMs and the global energy transition now provides an opportunity to **revitalise the AMV agenda under new geopolitical conditions**.

3.2 The Africa Green Minerals Strategy: Updating the Vision for the Energy Transition

The Africa Green Minerals Strategy builds upon the foundations laid by the AMV while adapting them to the realities of the emerging low-carbon economy. The AGMS recognises that the global shift toward renewable energy technologies will dramatically increase demand for certain minerals that are abundant across Africa. At the same time, it acknowledges the risk that African countries could remain locked into low-value segments of global supply chains unless they undertake deliberate policy interventions.

Source: © Sunshine Seeds / Adobe Stock

Central to the AGMS is the concept of **Equitable Resource-Based Industrialisation (ERBI)**. This framework emphasises that the benefits of mineral extraction must be distributed more broadly across African economies through industrial development, job creation, and technological upgrading.

The Strategy therefore calls for several key policy priorities:

a. expanding mineral processing and refining capacity within Africa;
b. developing regional industrial ecosystems around battery technologies and renewable energy equipment;
c. strengthening local content policies to increase domestic participation in mining supply chains;
d. leveraging the African Continental Free Trade Area (AfCFTA) to create larger integrated markets capable of supporting manufacturing industries.

Importantly, the AGMS also recognises the **geopolitical dimension of CETMs**. As major economies compete to secure access to critical minerals, African countries must ensure that partnerships with external actors support domestic development objectives rather than reinforcing patterns of dependency. This requires strategic coordination not only at the national level but also across the continent.

3.3 National Strategies: Evidence of Policy Convergence

In recent years, several African countries have begun adopting national strategies focused on critical minerals and energy transition supply chains. Two examples illustrate the emerging policy convergence across the continent.

South Africa's 2025 Critical Minerals Strategy emphasises leveraging the country's mineral endowment to support domestic industrial development. The strategy prioritises mineral beneficiation, advanced manufacturing, and the development of industrial ecosystems around emerging technologies such as hydrogen, battery storage, and green steel production.

Similarly, Zambia's National Critical Minerals Strategy (2024-2028) explicitly links mineral extraction to economic transformation. The strategy calls for expanded geological mapping, increased state participation in the mineral sector, establishing government special purpose vehicles for strategic investments, and developing local processing and refining capacity. Zambia also emphasises the importance of regional value chains, particularly in collaboration with neighbouring countries such as the Democratic Republic of Congo. Together, these countries possess some of the world's most important reserves of copper and cobalt, two minerals central to battery production and electrification. Many other countries are finalising their National

Critical Mineral Strategy: the DRC already has a draft, and Tanzania has advanced policy articulations on utilisation of its critical minerals.

The existence of such strategies demonstrates that African governments are increasingly aware of the strategic importance of CETMs. However, it also highlights a key challenge: **when pursued individually, national strategies risk undermining one another through fragmented policies and competition for investment**. Even worse, African countries can be locked at the bottom of the global value chain of the EV market by becoming the producers of lower cost EV batteries for EV multinationals in the EU, US, China and beyond. Under the *One Voice, One Strategy* blueprint, Africa can develop its own EV industry and create and capture value on the continent.

Notably, domestic strategies tend to be too weak on environmental and social safeguards, workers' rights and community protection, as countries compete individually for external investments.

Therefore, Africa must move toward a more coordinated continental approach, with uniform, stringent social and environmental regulations, to avoid a new cycle of economic entrapment and exploitation of its peoples.

4. *One Voice, One Strategy:* A Continental Diplomatic Framework

The transformation of Africa's mineral sector cannot be achieved through national policies alone. While domestic reforms remain essential, they are insufficient to alter the structural dynamics of global mineral markets.

These markets are characterised by high levels of concentration in processing, technology ownership, and manufacturing capacity. A small number of multinational corporations and industrialised economies dominate key segments of CETMs' supply chains. Individual African countries negotiating separately with these actors often face significant asymmetries in bargaining power. For this reason, the success of Africa's mineral development agenda depends critically on **collective diplomatic coordination**.

The principle of *One Voice, One Strategy* seeks to address this challenge by strengthening Africa's ability to act collectively in shaping the global governance of CETMs.

4.1 Why Collective Action Matters

Fragmented national bargaining weakens Africa's position in several ways. **First**, it creates opportunities for external actors to play countries against one another in negotiations over investment, taxation, and regulatory standards. Competition among mineral-rich countries can lead to a race to the bottom in fiscal regimes, environmental standards, and local content requirements. **Second**, fragmented policies can disrupt regional value-chain development. If neighbouring countries pursue conflicting export regulations, investment incentives, or industrial strategies, it becomes difficult to build integrated supply chains capable of supporting large-scale manufacturing. **Third**, individual countries that attempt to impose stronger beneficiation requirements or export controls may face retaliation from global corporations or trading partners if they act alone.

By harmonising policies and coordinating diplomatic positions, African countries can reduce these risks while enhancing their collective leverage. Collective action is not a theoretical aspiration; it is a practical necessity in global markets characterised by concentrated power and strategic competition.

4.2 Pillars of a Continental CETMs Diplomacy

A continental diplomatic framework for CETMs should rest on three key

pillars. **First**, African countries should articulate a shared set of principles guiding the development of CETMs supply chains. These principles would emphasise value addition within Africa, fair distribution of benefits, environmental sustainability, and the promotion of regional industrial development. **Second**, countries should coordinate the timing and design of key policy instruments, including export regulations, local content rules, and investment frameworks. Coordinated reforms reduce the risk of policy arbitrage by multinational corporations seeking to exploit regulatory differences across jurisdictions. **Third**, Africa should strengthen its presence in international forums where CETMs governance is increasingly being shaped. Engagement with major powers, multilateral institutions, and emerging mineral alliances must reflect a coherent continental position rather than fragmented national approaches.

4.3 Strategic Options for Collective Leverage

Operationalising the *One Voice, One Strategy* framework will require carefully designed strategic instruments that enhance Africa's bargaining power while supporting domestic development goals.

Potential options include:

a. coordinated licensing frameworks for critical minerals;
b. shared standards for local processing and beneficiation;
c. regional stockpiling mechanisms for strategic minerals;
d. collective negotiation platforms for major investment projects;
e. producer coordination mechanisms (where appropriate) that strengthen Africa's influence over global supply conditions; and
f. implementation of a common set of health, safety, and environmental standards across the continent.

The objective is not to restrict trade or discourage investment, but rather to ensure that Africa's mineral wealth contributes meaningfully to the continent's long-term development. Africa's CETMs are not merely commodities to be exported. They are strategic assets capable of underpinning a new phase of industrialisation to address the continent's needs. Harnessing this potential will require vision, coordination, and the political courage to act *collectively*.

5. Mapping Africa's CETMs Landscape and Value-Chain Potential

Africa's mineral endowment provides the material foundation for a new phase and kind of industrialisation linked to the global energy transition. The continent hosts significant reserves of several minerals essential to renewable energy technologies, battery production, electric mobility, and modern electricity systems. These resources are distributed across multiple regions, creating opportunities for **regional value-chain development and industrial clustering**. However, mineral reserves alone do not guarantee development outcomes. The central challenge facing African countries is translating geological wealth into **productive economic capabilities** that generate employment, technological learning, and diversified industrial growth.

5.1 Africa's Mineral Endowment and Regional Clusters

The distribution of critical minerals across Africa reveals several emerging regional clusters with strong potential for coordinated value-chain development. In **Central and Southern Africa**, the Copperbelt spanning Zambia and the DRC represents one of the world's most important sources of copper and cobalt. These minerals are indispensable for electric vehicles, battery manufacturing, and electricity transmission infrastructure.

Southern Africa and Eastern Africa also host significant reserves of platinum group metals, manganese, nickel, and lithium. South Africa, Zimbabwe, and Namibia collectively possess mineral resources that could support advanced industries in battery technologies, hydrogen production, and green steel manufacturing. Tanzania, Madagascar and Mozambique are emerging as major graphite producers, another critical component of lithium-ion batteries. Across **West Africa**, bauxite, manganese, and emerging lithium discoveries create additional opportunities for industrial development, particularly if combined with expanded regional energy infrastructure. **North Africa** adds another critical dimension to this continental industrial ecosystem. Morocco has emerged as a global leader in phosphate production and fertiliser manufacturing while rapidly developing battery component manufacturing and electric vehicle supply chains, supported by its expanding renewable energy sector. Egypt combines significant phosphate resources with growing industrial capabilities, strategic logistics through the Suez Canal, and an increasingly diversified manufacturing base. Together with Algeria's mineral potential and energy resources, these capabilities position North Africa as a strategic hub for advanced manufacturing, processing,

logistics, and export. Viewed collectively, Africa's regional mineral endowments and industrial capabilities are highly complementary.

These clusters suggest that Africa's mineral geography is well suited to developing **regional industrial corridors**, where different countries and regions specialise in complementary segments of CETMs supply chains.

The challenge is therefore not the absence of resources or productive potential, but the lack of coordinated continental planning to integrate these complementary strengths into resilient African value chains; hence the importance of the *One Voice, One Strategy* blueprint.

5.2 Regional Value Chains and Industrial Ecosystems

Transforming Africa's mineral sector requires moving beyond isolated extraction toward integrated value chains that link mining operations with processing, manufacturing, and technology development. Several priority industrial ecosystems are particularly relevant in the context of the energy transition:

Battery value chains represent one of the most promising opportunities. Africa already produces key battery minerals such as cobalt, lithium, manganese, graphite, and nickel. With appropriate investments in refining, precursor manufacturing, and battery assembly, African countries could capture significantly greater value within this rapidly expanding industry. However, Africa's ambition needs to move beyond becoming a supplier of lower cost batteries for multinational EV producers, and rather prioritise battery production that feeds into higher value addition in African industries, including African EV production and joint ventures.

Electric mobility offers another avenue for industrial development. The electrification of buses, two-wheelers, and light vehicles could stimulate domestic manufacturing while simultaneously addressing urban air pollution and energy security challenges. Electric rail for public transportation in major African cities, as well as high-speed electrified rail systems that are manufactured and deployed in Africa, are the foundations of logistics and transportation for sustainable prosperity.

Clean cooking infrastructure will spare nearly one billion Africans from inhaling toxic fumes (mostly women and children) and will eliminate a major driver of deforestation, indoor air pollution and gender inequality.

Green steel and ferroalloys also present significant opportunities. Africa's iron ore reserves, combined with renewable energy potential and access to platinum group metals for hydrogen technologies, create favourable conditions for developing low-carbon steel production.

Source: © Shutterstock

Finally, **renewable energy infrastructure manufacturing**, including solar panels, wind turbine components, and grid equipment, offers significant opportunities since it can benefit from local supply chains for copper, aluminium, and rare earth elements.

Developing these industrial ecosystems will require deliberate coordination among mineral policy, industrial policy, energy planning, infrastructure development, skills formation, financial architecture, public procurement, and regional trade integration. The objective is not merely to increase the domestic processing of individual minerals, but to use Africa's mineral wealth as a springboard for a much broader transformation of the continent's productive structure. Battery production should support African mobility, power systems, agriculture, and industry. Green steel should supply African railways, cities, renewable energy systems, machinery, and manufacturing.

Mineral processing should generate upstream demand for African equipment, engineering, chemicals, and services, while downstream industries create African technologies, consumer goods, and intellectual property. In this sense, critical minerals are not the destination of the strategy; they are the strategic foundation upon which a new generation of African industrial ecosystems can be built.

Africa's critical minerals industrialisation strategy should not be conceived as a collection of disconnected mining, processing, or manufacturing projects. It should be organised around integrated industrial ecosystems that connect mineral endowments to energy systems, infrastructure, skills, finance, research, public procurement, and continental markets. The illustrative roadmap below shows how Africa could progressively move from extraction and preliminary processing toward intermediate goods, advanced manufacturing, technological ownership, and circular production systems (see Table 1). The precise allocation of activities would depend on regional resource endowments, existing capabilities, infrastructure, market proximity, and ecological considerations. The underlying principle, however, is that value chains should be deliberately distributed across the continent to create complementarities, economies of scale, and shared industrial benefits, rather than encouraging African countries to compete for identical investments.

Source: © Leonardo / Adobe Stock

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

01 STRATEGIC INDUSTRIAL ECOSYSTEM
Battery materials and energy storage

Priority minerals and material inputs	Cobalt, lithium, manganese, nickel, graphite, copper, aluminium, phosphates
Near-term priorities: 0-5 years	Establish regional mineral-processing hubs; expand refining and purification capacity; produce battery-grade materials; develop precursor and cathode/anode manufacturing; negotiate technology-transfer and joint-venture agreements; adopt common standards for mineral traceability, environmental protection, and labour rights
Medium-term priorities: 5-10 years	Scale regional cell manufacturing and battery-pack assembly; integrate African suppliers into equipment, chemicals, components, maintenance, software, and recycling; develop battery systems suited to African conditions, including mini-grids, public transport, agricultural machinery, and stationary storage
Long-term ambition: 10-20 years	Build fully integrated African battery industries capable of designing, manufacturing, servicing, repurposing, and recycling advanced storage technologies; establish African ownership of patents, industrial designs, and battery management systems
Enabling policies and institutions	Africa Green Minerals Strategy; AfCFTA rules of origin; regional industrial policy; development bank finance; research centres; common product standards; public procurement; African Just Term Sheet
Intended development outcomes	Greater value capture from battery minerals; reduced dependence on imported storage systems; industrial employment; energy resilience; technological upgrading

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

02 STRATEGIC INDUSTRIAL ECOSYSTEM
African electric mobility

Priority minerals and material inputs	Lithium, cobalt, manganese, nickel, graphite, copper, aluminium, steel, rare earth elements
Near-term priorities: 0-5 years	Prioritise electric buses, motorcycles, three-wheelers, taxis, delivery vehicles, and municipal fleets; establish assembly plants and component-supplier programmes; expand charging infrastructure; use public procurement to create initial demand
Medium-term priorities: 5-10 years	Increase domestic production of motors, batteries, power electronics, vehicle bodies, charging systems, and control software; harmonise vehicle and charging standards; develop regional supply networks and after-sales ecosystems
Long-term ambition: 10-20 years	Establish globally competitive African electric vehicle manufacturers and integrated mobility systems serving African and export markets; progressively develop African-owned vehicle platforms and intellectual property
Enabling policies and institutions	Public procurement; industrial incentives; regional vehicle standards; concessional finance; urban transport policy; local-content requirements; joint ventures; skills development
Intended development outcomes	Rapid reduction of petroleum-import dependence and ultimately zero-fossil fuel use; cleaner urban transport; manufacturing growth; improved air quality; stronger regional markets

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

03 STRATEGIC INDUSTRIAL ECOSYSTEM
Electric rail and sustainable transport systems

Priority minerals and material inputs	Copper, aluminium, steel, manganese, nickel, rare earth elements, platinum group metals
Near-term priorities: 0-5 years	Rehabilitate existing rail systems; electrify priority urban and freight routes; develop regional procurement strategies for rolling stock, signalling, cables, transformers, and maintenance services
Medium-term priorities: 5-10 years	Establish African manufacturing and refurbishment facilities for locomotives, passenger coaches, freight wagons, rail components, signalling systems, and electrical equipment; connect industrial zones to regional rail corridors
Long-term ambition: 10-20 years	Develop integrated African high-speed passenger, urban transit, and electrified freight systems with substantial African manufacturing content and technological ownership
Enabling policies and institutions	PIDA; regional corridor plans; African development finance institutions; public procurement; engineering academies; coordinated transport and industrial policy
Intended development outcomes	Lower logistics costs; stronger regional integration; reduced transport emissions; expansion of steel, electrical, engineering, and manufacturing industries; enhanced mobility and cultural exchanges among African populations

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

04 STRATEGIC INDUSTRIAL ECOSYSTEM
Clean cooking and decentralised energy systems

Priority minerals and material inputs	Copper, aluminium, iron and steel, lithium, manganese, nickel, ceramics, locally available biomass and renewable resources
Near-term priorities: 0-5 years	Expand manufacturing of electric cooking appliances, efficient stoves, induction systems, LPG transition equipment if/where appropriate, mini-grid components, and household energy storage devices; establish targeted public procurement and concessional consumer finance programmes
Medium-term priorities: 5-10 years	Build regional appliance and component industries; expand local production of heating elements, batteries, control systems, smart meters, and efficient cookware; integrate clean cooking with electrification, housing, health, and gender policies
Long-term ambition: 10-20 years	Achieve universal access to clean cooking through predominantly African-manufactured technologies powered by reliable renewable energy systems
Enabling policies and institutions	Energy-access policy; social protection; public procurement; standards and certification; gender responsive finance; local enterprise development
Intended development outcomes	Reduced indoor air pollution; lower deforestation; improved health; reduced unpaid care burdens; expansion of consumer goods manufacturing

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

05 STRATEGIC INDUSTRIAL ECOSYSTEM
Green steel and low-carbon metals

Priority minerals and material inputs	Iron ore, manganese, chromium, nickel, platinum group metals, renewable electricity, green hydrogen
Near-term priorities: 0-5 years	Map regional ore, energy, water, infrastructure, and market complementarity; upgrade existing steel and ferroalloy facilities; establish renewable energy-linked industrial zones; develop pilot green hydrogen and direct reduced iron projects
Medium-term priorities: 5-10 years	Expand low-carbon steel, stainless steel, manganese alloys, chromium products, and fabricated metals; link production to rail, construction, renewable energy, vehicles, machinery, and industrial equipment
Long-term ambition: 10-20 years	Position Africa as a major producer of low-carbon steel and advanced alloys for continental industrialisation and global markets, with substantial domestic fabrication and engineering capacity
Enabling policies and institutions	Regional energy planning; industrial tariffs; infrastructure finance; public procurement; local content rules; technology partnerships; carbon border diplomacy
Intended development outcomes	Industrial diversification; construction and infrastructure capacity; reduced imports of steel products; higher-value mineral exports; strategic industrial autonomy

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

06 STRATEGIC INDUSTRIAL ECOSYSTEM
Renewable energy equipment manufacturing

Priority minerals and material inputs	Copper, aluminium, silicon, manganese, nickel, rare earth elements, iron and steel, silver and other conductive materials
Near-term priorities: 0-5 years	Develop assembly and component-production capacity for solar modules, inverters, mounting systems, cables, transformers, batteries, meters, wind towers, blades, and selected turbine components
Medium-term priorities: 5-10 years	Deepen domestic production of cells, power electronics, grid equipment, control systems, substations, and energy management software; develop regional renewable-energy supplier clusters
Long-term ambition: 10-20 years	Establish integrated African clean energy industries capable of designing, producing, installing, maintaining, and recycling renewable-energy and grid technologies across the full value chain
Enabling policies and institutions	AfSEM; Continental Power Systems Master Plan; renewable energy procurement; common standards; development finance; research institutions; regional manufacturing strategies, ambitious capacity building and mobilization schemes
Intended development outcomes	Lower renewable-energy costs; reduced equipment imports; industrial employment; energy sovereignty; stronger grid resilience, reduced climate impacts

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

07 STRATEGIC INDUSTRIAL ECOSYSTEM
Mining equipment, machinery, and industrial inputs

Priority minerals and material inputs	Steel, aluminium, copper, industrial minerals, chemicals, rubber, digital technologies
Near-term priorities: 0-5 years	Identify imported inputs that can be produced competitively in Africa; support local production of protective equipment, fabricated components, pipes, cables, pumps, spare parts, construction materials, maintenance services, and selected chemicals
Medium-term priorities: 5-10 years	Develop heavier industrial capabilities in mining machinery, processing equipment, sensors, automation systems, industrial software, laboratory services, and engineering design
Long-term ambition: 10-20 years	Build African mining-technology and capital-equipment firms capable of serving continental and international markets
Enabling policies and institutions	Supplier-development programmes; development-bank credit; public procurement; technology licensing; industrial parks; university-industry partnerships; deep local-content policies
Intended development outcomes	Reduced import dependence; stronger upstream linkages; technologically capable African firms; expansion of engineering and capital-goods sectors

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

08 STRATEGIC INDUSTRIAL ECOSYSTEM
Mineral processing, refining, and advanced materials

Priority minerals and material inputs	Bauxite, copper, cobalt, lithium, manganese, graphite, nickel, rare earth elements, phosphates, platinum group metals
Near-term priorities: 0-5 years	Restrict indiscriminate raw-mineral exports through carefully sequenced measures; establish shared regional processing facilities; improve geological data, testing laboratories, certification, and mineral-traceability systems
Medium-term priorities: 5-10 years	Move into high-purity metals, specialised alloys, chemical compounds, battery precursors, magnets, catalysts, semiconductor inputs, and other advanced materials
Long-term ambition: 10-20 years	Develop African-controlled advanced-material industries supplying transportation, energy, electronics, construction, defence, health, and digital industries
Enabling policies and institutions	Coordinated beneficiation policy; export-management measures; regional specialisation; reliable energy; water infrastructure; research and development; competition policy
Intended development outcomes	Increased value added; improved export earnings; diversification; stronger bargaining power; industrial inputs for multiple African sectors

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

09 STRATEGIC INDUSTRIAL ECOSYSTEM
Recycling, circularity, and urban mining

Priority minerals and material inputs	Used batteries, vehicles, electronics, solar panels, wind equipment, industrial scrap, copper, aluminium, steel, rare earth elements
Near-term priorities: 0-5 years	Establish collection systems, repair standards, extended producer responsibility, safe dismantling facilities, and regulations against hazardous waste dumping
Medium-term priorities: 5-10 years	Develop regional recycling and material-recovery facilities; support battery repurposing, electronics repair, metals recovery, and component remanufacturing
Long-term ambition: 10-20 years	Circular industrial systems that recover strategic materials as norm, reduce ecological pressure, extend product life, and create secondary supplies of critical minerals
Enabling policies and institutions	Environmental regulation; extended producer responsibility; municipal systems; customs enforcement; industrial standards; research funding, multilateral/diplomatic efforts to establish mandatory global recycling standards and regulations
Intended development outcomes	Reduced waste; lower material import dependence; employment in repair and recycling; reduced mining pressure; improved environmental outcomes, reduced social harm and negative impact on communities

Table 1: Illustrative African Critical Minerals Industrialisation Strategy and Roadmap

10 STRATEGIC INDUSTRIAL ECOSYSTEM
Digital and knowledge infrastructure for mineral industrialisation

Priority minerals and material inputs	Geological data, satellite systems, computing infrastructure, industrial software, sensors, telecommunications, artificial intelligence
Near-term priorities: 0-5 years	Develop African-controlled geological databases; improve mineral mapping; strengthen laboratories, certification systems, and public access to resource data; establish cybersecure digital systems for traceability
Medium-term priorities: 5-10 years	Build continental platforms for production planning, supplier matching, commodity intelligence, logistics coordination, industrial forecasting, and research collaboration
Long-term ambition: 10-20 years	Establish African technological sovereignty over strategic mineral data, industrial platforms, automation systems, and associated intellectual property
Enabling policies and institutions	African Minerals Development Centre; universities; geological surveys; digital sovereignty policy; public research funding; data governance frameworks
Intended development outcomes	Better public planning; stronger negotiating capacity; reduced information asymmetry; improved tax and royalty administration; technological sovereignty

The sectors presented in Table 1 above are not isolated sectoral projects. The following table shows the sequencing of the overall *One Voice, One Strategy* blueprint.

Table 2: Cross-cutting implementation roadmap

Phase	Strategic objective	Priority actions
Phase I: Continental alignment and capability mapping (Years 1-3)	Establish a common strategic baseline	Map mineral reserves, energy resources, infrastructure, industrial capacity, skills, research institutions, and market demand; identify regional comparative and complementary advantages; adopt common negotiating principles; establish the *One Voice, One Strategy* coordination mechanism; agree on priority value chains and regional specialisation. Embed all these actions in cross-cutting examination of how an 'another development' based, different industrial model anchored in sufficiency must set social and environmental limits
Phase II: Foundations for industrialisation (Years 4-7)	Build the productive infrastructure and institutional capacity needed for value addition	Expand electricity generation and transmission; develop productive industrial corridors; modernise ports and rail systems; establish regional processing hubs; mobilise development finance; create Pan-African centres of excellence; harmonise standards, rules of origin, procurement policies, and investment frameworks. Establish strict social and environmental safeguards and regulations including provisions for stakeholder participation and appeals mechanisms

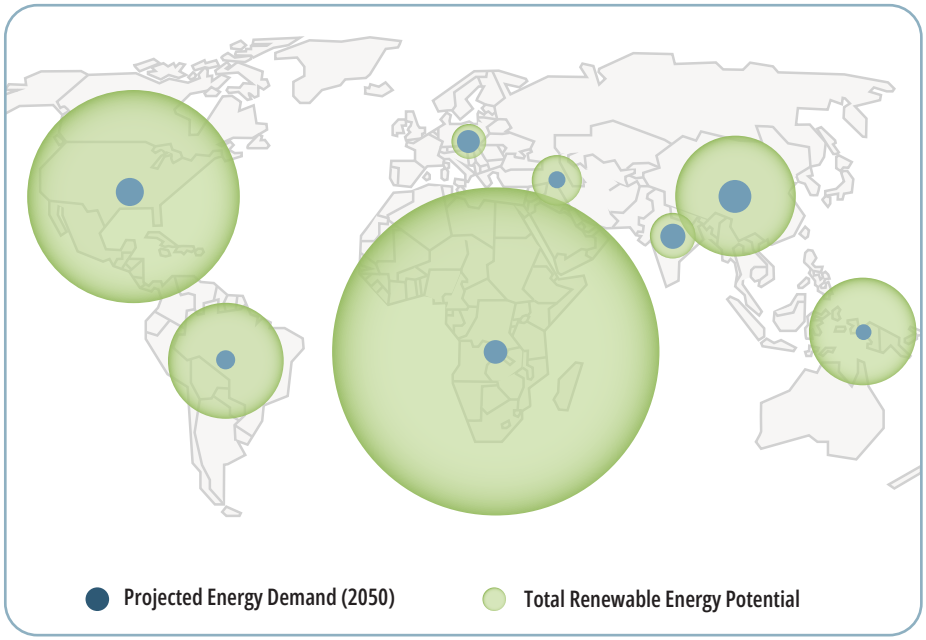
Phase	Strategic objective	Priority actions
Phase III: Regional value-chain development (Years 8-12)	Move from mineral processing into component and intermediate goods production	Scale refining, precursor production, fabrication, machinery, battery components, vehicle parts, grid equipment, green steel, industrial chemicals, and recycling; strengthen African supplier networks; use public procurement to create continental demand; expand African ownership and development of public-interest oriented economic entities
Phase IV: Advanced manufacturing and technological upgrading (Years 13-20)	Establish African leadership in higher-value industries	Produce complete batteries, electric vehicles, rail systems, renewable-energy equipment, advanced materials, industrial machinery, software, and control systems; expand African R&D and control of knowledge for the common good; develop globally competitive African firms; enter selected export markets from a position of technological and industrial strength
Phase V: Continuous review, accountability, and adaptation	Ensure implementation remains coherent, inclusive, and responsive	Publish implementation indicators; conduct regular peer reviews; monitor and continuously strengthen community, labour, gender, environmental, and industrial standards and their implementation; revise targets as technologies and markets evolve; prevent destructive competition between African countries; enforce the African Just Term Sheet

5.3 Structural Bottlenecks and Constraints

Despite these opportunities, several structural challenges continue to constrain Africa's ability to move up the CETM value chains. **Energy infrastructure** remains one of the most significant bottlenecks. Mineral processing and manufacturing industries are energy-intensive and require reliable and affordable electricity. Many African countries still face electricity shortages and high electricity costs, which discourage investment in value-added activities.

Addressing this bottleneck requires a coordinated continental approach to energy planning that treats affordable, reliable, and clean electricity as a strategic industrial input beyond just a public utility. African governments, Regional Economic Communities, power utilities, and development finance institutions should accelerate the implementation of the African Single Electricity Market (AfSEM) and the Continental Power Systems Master Plan to expand cross-border electricity trade, optimise renewable energy resources, and reduce the cost of power for industrial users. Strategic renewable energy investments, including solar, wind, hydro, and geothermal should be developed alongside new transmission corridors and industrial parks dedicated to mineral processing and manufacturing. By integrating energy planning with industrial policy, transport infrastructure, and regional value chain development, Africa can transform its abundant renewable energy potential into a durable competitive advantage for resource-based industrialisation rather than allowing energy constraints to perpetuate dependence on raw mineral exports. According to the International Renewable Energy Agency (IRENA), Africa's renewable energy potential could generate up to 1,000 times its projected electricity demand using existing technologies within the next 15 years (IRENA, 2021).

Figure 3: Africa's vast renewable energy potential



Source: Teske & Niclas (2021).

Infrastructure limitations, including railways, ports, transmission networks, border facilities, and logistics systems, also raise the cost of transporting raw materials, intermediate goods, and finished products across African borders. Addressing these constraints requires more than expanding transport capacity; it requires developing **integrated industrial corridors** designed to strengthen regional value chains rather than simply facilitate mineral exports. Emerging initiatives such as the **Lobito Corridor** and the modernisation of the **TAZARA Railway** illustrate the potential of strategic cross-border infrastructure to connect mineral-producing regions with processing facilities, manufacturing clusters, renewable energy systems, and regional markets. However, these investments will contribute to structural transformation only if they are embedded in coordinated industrial strategies that prioritise local value addition, technology development, and intra-African trade, and within a context of production for prudent use for essential needs. The objective should not be to build faster routes for exporting unprocessed minerals, but to create productive economic corridors that anchor industrial ecosystems across multiple African countries.

However, what we often see in Africa are extractive transportation corridors that are coupled with restricted access to manufacturing technology via WTO trade and investment rules such as TRIPS and TRIMS agreements, prohibitive licensing rules and costs that prevent the transfer of life-saving technologies, including pharmaceutical products and clean energy technology (Chang, 2002). All of these reproduce the continent's structural economic entrapment at the bottom of the global value chain.

Source: © YASTAJ / Shutterstock

Skills shortages and limited research capacity represent another major challenge. Advanced mineral processing and manufacturing technologies require highly specialised technical expertise that remains scarce across many parts of the continent. Overcoming these constraints requires a continental strategy for human capital development that aligns education, research, and technical training with Africa's long-term industrial ambitions. African governments, universities, technical and vocational education institutions, research centres, and the private sector should establish a network of Pan-African Centres of Excellence dedicated to critical minerals, metallurgy, battery technologies, renewable energy systems, industrial engineering, advanced manufacturing, material science research, and the circular economy. This effort should be complemented by harmonised professional standards, expanded student and researcher mobility, industry-university partnerships, and coordinated investment in applied research and innovation. Building on existing initiatives such as the African Union's Science, Technology and Innovation Strategy for Africa (STISA-2024), the African Higher Education Centers of Excellence, and the African Minerals Development Centre, Africa can progressively develop the scientific, engineering, and managerial capabilities required to move from resource extraction to technological leadership.

Finally, access to long-term financing for industrial investment remains constrained. Private investors often perceive mineral processing and manufacturing projects in Africa as high-risk due to regulatory uncertainty and infrastructure gaps. Additionally, this financing gap is compounded by the structural relationship between external debt and Africa's position in global manufacturing value chains (Kaboub & Chiriboga, 2025). Since industrial inputs, machinery, and even packaging, are largely imported, manufacturing in Africa generates persistent trade deficits that must be financed through foreign-currency borrowing, exposing economies to exchange-rate risk and reinforcing dependency on external creditors. Debt-service denominated in foreign currency competes directly with the fiscal space needed for industrial investment, as governments are often compelled to prioritise creditor repayment over the productive investments that could structurally reduce their reliance on imports (UNCTAD, 2023; Kaboub, 2026b).

Breaking the debt trap and closing the financing gap requires a coordinated African development finance architecture capable of mobilising long-term patient capital for industrial transformation. Rather than relying predominantly on external commercial finance, African governments should strengthen the role of African institutions, such as the African Development Bank (AfDB), Afreximbank, the Africa Finance Corporation, the Trade and Development Bank, the Association of African Development

Finance Institutions, national development banks, sovereign wealth funds, and public pension funds in financing strategic industrial projects. Blended finance should be used only selectively to crowd in productive private investment without socialising private risks or undermining public development objectives. A stable, transparent, and coordinated continental policy framework, supported by the African Continental Free Trade Area (AfCFTA), harmonised investment regulations, and the African Just Term Sheet proposed in this Blueprint can significantly reduce investor uncertainty while ensuring that financing arrangements remain aligned with Africa's industrialisation, technological upgrading, and long-term structural transformation.

Addressing these challenges requires coordinated public investment, institutional capacity building, and regional cooperation. However, it is also important to recognise that Africa's challenge is not a lack of vision but fragmentation under structural pressure: external debt pressure, inflation pressure, balance-of-payments pressure, and exchange rate depreciation pressure. These pressures make countries vulnerable to accepting suboptimal bilateral deals that perpetuate economic entrapment at the bottom of the global value chains.

5.4 Strategic Instruments for Value-Chain Development

African governments have several policy instruments available to promote value-chain development in the CETMs sector. Local content policies can increase domestic participation in mining supply chains and stimulate the growth of local supplier industries. However, local content strategies should move beyond narrow procurement requirements and be embedded within broader industrial policies that simultaneously develop upstream and downstream capabilities. On the upstream side, this requires strengthening domestic industries that supply mining operations with equipment, fabricated metals, chemicals, engineering services, digital technologies, maintenance, logistics, and other industrial inputs, thereby progressively reducing dependence on imported goods and services. On the downstream side, carefully designed beneficiation policies should promote mineral processing, refining, precursor materials, battery components, manufacturing, recycling, and other higher-value activities that capture a greater share of the value chain within Africa. Local content should therefore be understood not merely as increasing domestic participation in existing mining activities, but as expanding Africa's industrial base so that a growing share of both mining inputs and mineral outputs is produced competitively within the continent. Achieving this objective requires coordinated industrial policy, targeted support for African enterprises, investment in technological capabilities, and regional market integration through the AfCFTA. In other words, regional and continental policy harmonisation and coordination are a prerequisite for the industrial economies of scale needed for structural transformation.

Furthermore, African policymakers must clearly distinguish between shallow and deep local content policy choices under the *One Voice, One Strategy* blueprint. **Shallow local content** focuses primarily on increasing domestic firms' participation in supplying goods and services to mining operations, often in activities such as catering, transport, security, construction, and maintenance. While these activities generate employment and business opportunities, they rarely transform the economy's productive structure. However, **deep local content** uses mining as a platform for broader industrialisation by developing domestic capabilities in capital equipment, industrial machinery, fabricated metals, chemicals, engineering services, advanced manufacturing, research and development, and downstream mineral processing. It seeks not only to increase local participation in mining, but to expand the range and sophistication of goods and technologies produced within Africa.

Public investment in infrastructure, particularly energy generation and transport corridors, can lower production costs and attract industrial investment. Strategic partnerships between governments and private firms, including state equity participation in key projects, can also help align investment decisions with national development objectives. Finally, regional coordination through the African Continental Free Trade Area can support the creation of integrated markets that can sustain large-scale manufacturing industries. Together, these instruments provide the foundation for transforming Africa's mineral wealth into a driver of industrial development.

Source: © Shutterstock

6. Managing Variable Geometry and Asymmetric Gains

One of the most persistent challenges in advancing regional economic integration across Africa is the concern that cooperation may generate **unequal benefits among participating countries**. These concerns are particularly pronounced in the context of CETMs value chains. Countries with large mineral reserves may fear losing control over their resources, while those with more advanced industrial capabilities may capture a disproportionate share of value-added activities. Addressing these concerns is essential for building the political consensus required to implement a continental CETMs strategy. This is addressed in the three points listed below and incorporated into what we call the *Geopolitical Bargain of the Century*.

6.1 Uneven Starting Points Across the Continent

African countries differ significantly in terms of mineral endowment, industrial capacity, infrastructure availability, technological capabilities, and institutional and organisational capacity. Some countries possess abundant mineral resources but limited manufacturing capacity. Others have more developed industrial bases but fewer mineral reserves. Infrastructure access, energy systems, and financial resources also vary widely. These differences create legitimate concerns that some countries may benefit more than others from regional value-chain development.

However, diversity can also be a source of strength. By allowing countries to specialise in different segments of CETMs supply chains, regional cooperation can generate mutually beneficial outcomes that would be impossible through isolated national strategies.

6.2 Compensation and Equalisation Mechanisms

To ensure that regional integration produces inclusive outcomes, African institutions can develop mechanisms that distribute benefits more equitably across participating countries. One approach involves **regional industrial planning**, where different countries host complementary segments of CETMs value chains based on their comparative advantages. Another approach involves **financial equalisation mechanisms**, including regional development funds that support infrastructure investment and industrial capacity building in less developed economies. The core principle of these equalization mechanisms is that coalition members may start from different levels of economic development, and with different levels of resources

and capabilities, but they will – *by design* – converge towards higher quality-of-life standards, sustainable prosperity pathways, and higher degrees of economic and monetary sovereignty (Sylla, 2020; Ben Gadha *et al.*, 2021), For example, the coalition may design a system of deployment of newly produced energy infrastructure in countries that need it the most first. They may decide that joint-venture ownership structures favour countries with very limited mineral resources. They may even use innovative shareholding structures that automatically trigger compensation and equalisation mechanisms based on pre-negotiated thresholds.

AfCFTA rules on **regional value-chain cumulation** can also ensure that inputs sourced from multiple African countries qualify for preferential trade treatment, encouraging cross-border industrial cooperation. Public investment banks, sovereign wealth funds, and regional financial institutions can further support joint industrial projects that generate shared economic benefits.

6.3 Turning Diversity into Strength

Rather than viewing differences in capabilities as obstacles, African countries can treat them as opportunities for strategic specialisation. Some countries may focus on mining and primary processing. Others may specialise in refining, component manufacturing, or final assembly of technology products. Infrastructure hubs and logistics corridors can serve multiple countries simultaneously. Through coordinated planning, these complementary roles can form the basis of integrated regional industrial ecosystems that generate benefits across the continent. Such an approach requires trust, institutional coordination, and long-term strategic vision, but it offers a far more promising path than fragmented national policies.

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7. Governance and Institutional Architecture

Transforming Africa's mineral sector requires institutional arrangements that can coordinate policy across multiple levels of governance. A successful CETMs strategy must therefore involve **continental institutions, regional organisations, and national governments**, each playing complementary roles in implementation.

7.1 Continental Leadership

At the continental level, the African Union has a central role in articulating common policy principles and coordinating diplomatic engagement on CETMs. Institutions such as the **African Minerals Development Centre (AMDC)** and the **United Nations Economic Commission for Africa (UNECA)** can provide technical expertise, research support, and policy guidance to member states (UNECA, 2016; AU, 2013). The **AfCFTA Secretariat** also plays a critical role in facilitating regional trade integration, harmonising regulatory frameworks, and supporting the development of cross-border value chains. Together, these institutions form the backbone of Africa's continental governance architecture for mineral-based development.

7.2 Regional Economic Communities

Regional Economic Communities (RECs) represent a crucial intermediary layer between continental strategies and national implementation. RECs can coordinate infrastructure development, harmonise regulatory frameworks, and facilitate cross-border industrial cooperation. They are particularly well positioned to support the development of **regional CETMs corridors**, linking mineral extraction sites with processing facilities, manufacturing hubs, and export logistics networks.

7.3 National Alignment

Ultimately, the success of any continental strategy depends on alignment with national policies. African governments must ensure that domestic CETMs strategies are consistent with broader continental objectives while reflecting national development priorities. National institutions responsible for mining, energy, industry, and trade as well as environmental and social policy must coordinate closely to ensure that policies reinforce rather than contradict one another. Without such coordination, fragmented national policies risk undermining the effectiveness of continental initiatives.

8. Geopolitical and Diplomatic Strategy

The global governance of CETMs is increasingly shaped by geopolitical competition between major economic powers. Countries such as China, the United States, and members of the European Union are actively developing strategies to secure access to critical minerals while strengthening domestic manufacturing capabilities. For African countries, engagement with these partners presents both opportunities and risks.

8.1 Africa's Current Position in Global Supply Chains

At present, Africa occupies a largely upstream position in global CETMs supply chains. The continent exports raw or minimally processed minerals while most refining, component manufacturing, and technology development occurs elsewhere. This structure reflects historical patterns of global industrial organisation rather than inherent economic constraints. However, it also means that African countries often negotiate with external partners from a position of structural disadvantage.

8.2 Engagement with Major Powers

Africa's CETMs diplomacy must therefore adopt a strategic approach to partnerships with major global actors. Engagement with **China** should focus on leveraging the country's extensive experience in mineral processing and manufacturing to support technology transfer and industrial learning within Africa.

Engagement with the **European Union and the United States** should emphasise the need for fair and mutually beneficial supply chain partnerships

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that include investment in local processing, skills development, and infrastructure. Emerging partnerships with **middle powers** such as India and Canada can also diversify Africa's options and reduce dependence on any single external actor.

8.3 Negotiation Priorities

Across all partnerships, Africa's negotiation priorities should remain consistent. External investment should contribute to the development of local processing and manufacturing industries. Technology transfer and skills development must be embedded in investment agreements. Financing arrangements should support long-term industrial development rather than short-term extraction. Most importantly, Africa's mineral wealth must be recognised as a foundation for the continent's own economic transformation and long-term aspirations; not merely as an input into the industrial strategies of other regions. This may include the designation of long-term strategic reserves that can be dedicated to new technological innovations, strategic priorities, and intergenerational equity.

8.4 A Common African Just Term Sheet

A unified African diplomatic position should extend beyond *what* partnerships seek to achieve and include agreement on *how* they are negotiated. In other words, *One Voice, One Strategy* should be accompanied by a common African **Just Term Sheet** that establishes minimum principles governing all strategic partnerships around CETMs (Naidoo *et al.*, 2026). Rather than negotiating financial arrangements on a case-by-case basis, African countries could adopt a common negotiating framework that embeds dignity, fairness, environmental sustainability and long-term structural transformation into the financing architecture itself. Such a framework would require financing arrangements to support African industrialisation through technology transfer, local value addition, predictable long-term finance, equitable risk sharing rather than one-sided de-risking, local-currency financing where feasible, protection against exchange-rate shocks, development-oriented rather than extractive conditionalities, transparent dispute resolution, and explicit commitments to domestic manufacturing, skills development, and research capacity. Common African Just Term Sheets – blueprints and checklists for effective negotiations – would therefore become the financial expression of *One Voice, One Strategy*, thus ensuring that every bilateral or multilateral agreement advances the continent's collective industrial objectives rather than fragmenting them through ad hoc negotiations and asymmetrical bargaining power. This would also reduce transaction costs, strengthen Africa's negotiating leverage, and create greater certainty for responsible investors by establishing clear continental expectations from the outset.

9. Africa's Joint Industrial Strategy

Real transformative industrialisation cannot happen at the national level because national economies lack sufficient economies of scale. When a small country attempts to industrialise, it needs access to a large consumer market to achieve the economies of scale needed to reduce per-unit production costs, improve production quality, enhance efficiency, and allow research and development to maintain competitiveness. Without large markets of their own, African countries end up manufacturing small components for someone else's industrial policy. Industrial policies can be implemented at the continental level (ideally), at the regional level in the Regional Economic Communities (RECs), or in any other regional configuration. These communities can even include other Global South partners from different regions, as long as they enhance the complementarity of the African bloc's resources and capabilities.

Africa cannot industrialise by reproducing the same hierarchies of the current international system or recreating the same patterns of socio-economic exclusion, inequity, injustice, and unsustainability. In other words, this One Voice, One Strategy industrialisation framework must establish new standards. Africa's joint industrial policies must also pre-negotiate the distribution of the value chain within the bloc so as not to lock some countries at the bottom of the value chain while others thrive and dominate it. Industrialisation should not be driven by consumerism, planned obsolescence, and export-oriented growth, but by a desire to manufacture the building blocks of development and prosperity in a way that meets material needs, reduces waste, preserves nature, and strengthens socio-economic and ecological cohesion. African countries collectively enjoy the complementarity of resources and capabilities, and the economies of scale needed for real transformative industrialisation. Africa has significant reserves of all the strategic minerals and metals needed for high-tech products, green technologies, and green industrialisation needed to power truly people-centred and sustainable African societies for the 21st century (See Figure 2).

What is lacking for a successful implementation of African joint industrial policies is the decision to engage in long-term strategic cooperation and access to manufacturing technology. Institutions and incentives need to be reconceptualised and transformed for long-term international campaigns. This requires not only the courage to think beyond one's presidential term and beyond the narrow discourse of national priorities, but it also requires a deeper understanding that **a country's national interest cannot be achieved without strategic cooperation.**

We can learn lessons from the Global North. A good example of successful cooperative industrial policies is the case of Airbus. When Boeing dominated the aircraft manufacturing industry, France and Germany had no way to create a viable alternative. Airbus had to be created as a Pan-European industrial policy joint venture to compete with Boeing by leveraging the complementarity of resources, capabilities, and the economies of scale needed for a successful venture. Finally, the last missing piece for cooperative industrial policies is access to the life-saving technology needed to manufacture the building blocks of development and prosperity in Africa – technologies to produce renewable energy, clean cooking, and clean public transportation infrastructure.

Source: © Shutterstock

Transfer of relevant technologies needs to be a focal point in climate, trade, debt, and development negotiations in all multilateral spaces. It is one of the most important obstacles to the Global South's economic transformation potential. This is where Global North development partners can show their commitment to fighting climate change and supporting a just and equitable transition. For instance, the technologies needed to replicate the entire value chain of manufacturing solar panels, wind turbines, high-speed rail, sanitation systems, irrigation systems, or clean cooking infrastructure are

readily available in China, Japan, Europe, Canada, Australia, and the United States. A South-South and South-North series of joint ventures would be essential to replicate the entire value chain of each one of these vital industries across a large bloc of African countries.

These joint-venture industrial policies can be designed as zero-dollar partnerships. African countries can pay labour and material costs in national currencies, while the Global North contributes in-kind by transferring and sharing the manufacturing technologies needed. Central banks in the participating bloc can manage currency imbalances by creating swap lines and enhance the use of the Pan-African Payment and Settlement System (PAPSS) to minimise or eliminate the impact of such imbalances, without imposing unnecessary austerity and other counter-productive measures. This African joint industrial policy model can also accelerate the establishment of the African Financial Institutions envisioned under the African Union's Agenda 2063 (ECOWAS, 2010; EAC, 2012; AUC, 2015; AU, 2015; SADC, 2015; AfDB, 2016; COMESA, 2017; AUC, 2024), and spur the development of a new financial, investment, trade, and taxation architecture that promotes development, justice, equity, and sustainable prosperity, unlike the current global economic architecture that is, *by design*, hierarchical, unequal, undemocratic, extractive, and ecologically unsustainable.

Finally, **strategic incrementalism** or what might be called **radical or transformative incrementalism**, may begin with small, practical, non-controversial common-sense steps that deliver immediate tangible results that galvanise popular support and motivate a series of more ambitious logical next steps that are incrementally small but **strategically scaffolded** together to produce the kind of structural transformation envisioned by the One Voice, One Strategy blueprint. A good example would be a Pan-African joint public procurement program (AUC, 2025b; Estévez *et al*., 2026).

Imagine a strategic cooperation of 25 finance ministries to share a list of the top 100 items that each country imports (annual volume, price, suppliers, delivery schedule, in-country distribution requirements, etc.). Such a list would immediately reveal that nearly all 25 countries import many items from the same suppliers but pay shelf prices rather than bulk prices. Imagine now, that the 25 finance ministers decide to form a Pan-African joint public procurement program to negotiate bulk prices from these global suppliers that would result in a net reduction of 5% (possibly more) of the initial cost of imports. That is 5% of additional foreign currency reserves and fiscal policy space that can be used to fuel strategic investments for structural transformation. Imagine now, that one of those items identified on that list happens to be something like small irrigation pumps, which are technically not that difficult to produce. Now we have all the input resources needed on the continent to form a Pan-African joint venture to manufacture and

deploy irrigation pumps to enhance our food sovereignty, reduce hunger, create jobs, and build the cornerstone of Pan-African joint industrial policies. The results will be felt immediately, the benefits will be shared equally, and Pan-Africanism will cease to be a rhetorical slogan and become the economic foundation of sustainable prosperity.

Now imagine, in the context of CETMs, a strategic cooperation among these 25 African countries to identify and aggregate their demand for the machinery, pharmaceuticals, equipment, and industrial inputs required across critical mineral value chains – from mining and mineral processing to refining, component manufacturing and clean-energy technologies.

In this way, collective procurement would become more than a mechanism for reducing import costs; it becomes the foundation of joint industrial policies – using Africa's combined market size, mineral endowments, and purchasing power to build domestic manufacturing capabilities, deepen regional value chains, create jobs, and progressively move the continent from being predominantly a supplier of raw CETMs to becoming an industrial powerhouse.

Source: © Shutterstock

10. The Geopolitical Bargain of the Century

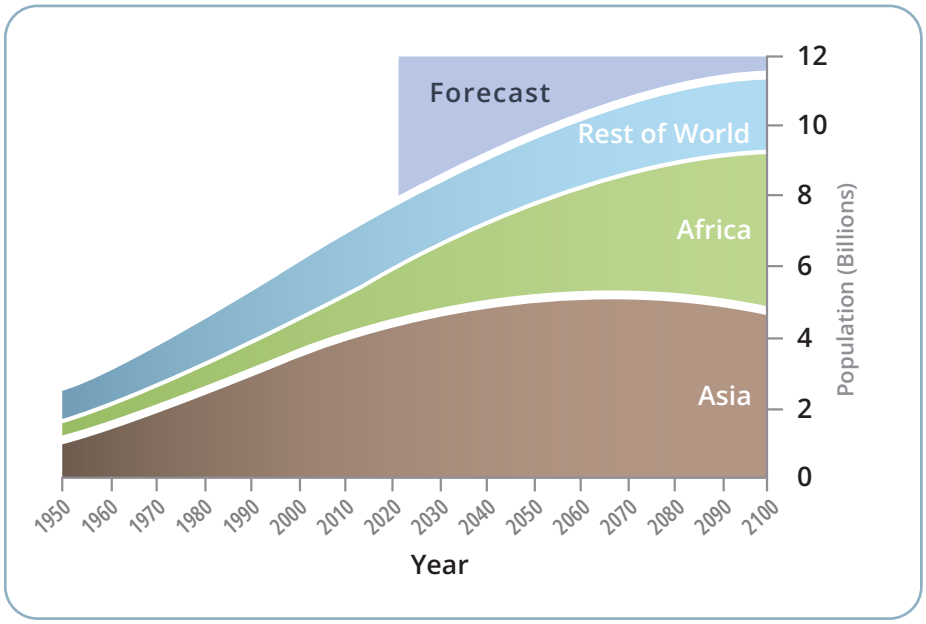
It is very unlikely that the offer to transfer technology for these joint industrial policies will come from the Global North. Why? Because such refusal to transfer technology has always been the unspoken official position of the Global North. There is already an existing understanding among these countries that transfer of technology for real industrial development and economic transformation in Africa will unleash Africa's potential as an energy powerhouse, as an industrial powerhouse, and as a geopolitical heavyweight to be reckoned with (Kaboub, 2021). Africa's real development and transformation is in fact perceived as an economic risk and as a geopolitical threat to be managed.

The transfer of technology will have to be achieved via an African bloc offering the first mover opportunity to a country like China to share its technology (on African terms). China could be offered what we might call "The Bargain of the Century", in which transferring technology to replicate the entire value chain to manufacture and deploy solar technology in Africa would give China the opportunity to unload its surplus productive capacity, increase its industrial footprint globally, increase its geopolitical weight globally, secure its access to critical minerals, and secure privileged access to what could be the largest consumer market on the planet (4 billion consumers by 2100), with higher potential purchasing power once fully developed, but once again, on African terms that reject the mainstream model of industrialization, consumerism, planned obsolescence, extractivism, injustice, and neocolonial hierarchies. If China accepts the Bargain of the Century then Africa would have the leverage to compel the entire Global North to join the Bargain of the Century by transferring technology to manufacture and deploy wind turbine technology, high-speed rail technology, medical technologies, and any beneficial technology needed for the building blocks of development and resilience in Africa on African terms. Otherwise, the Global North would risk losing further economic and geopolitical space to China and become the isolated Global Minority bloc.

The purpose of the Bargain of the Century is not to position China (or any other major country) at the top of the economic and geopolitical hierarchy, but rather to reposition Africa and the Global South (the global majority) at the centre of a new multipolar international economic order of peace, justice and sustainable prosperity. To be realistic, any attempt to form such a coalition will face serious political, economic, financial, and trade pressures (isolation, or even sanctions-like pressure) to leave the coalition. Such coordination would need to be fully prepared to secure the integrity of the African bloc of first movers. The starting point would be to secure and guarantee

privileged access to vital supply lines of food, fuel, medicines, and other vital commodities on favourable, concessional terms for the most vulnerable

Figure 4: Population growth in Africa and the rest of the world (1950-2100)



Source: EROS Center, 2016.

members of the coalition. This may even require a security pact[1] among coalition member states to deter any attempt to destabilise countries within the bloc. That ecosystem of collective self-reliance and solidarity is a geopolitical and economic prerequisite for successful transformation. The intensifying competition between major economic blocs – like the US, China and the EU – does not fundamentally alter the economic roles imposed on the Global South majority. In other words, dominant blocs are likely to resist a new international economic order. Therefore, the Global South must initiate this transformation on Global South terms, but it would require creating geopolitical and economic leverage to compel dominant economic blocs to accept and participate in establishing a new multipolar international economic order. This geopolitical and economic leverage point comes from what we might call "The Bargain of the Century" (Kaboub & Chiriboga, 2025).

1 For instance, if the bloc of first movers happens to include countries like South Africa and Brazil, and if the first major joint venture partner happens to be China, then we are essentially looking at a core of the BRICS bloc being involved in one of the major efforts to radically transform the global economic architecture. Therefore, a security pact involving BRICS and a bloc of Global South first movers represents a significant layer of economic and national security protection to deter the kind of interference and pressures experienced in the Global South in the past.

Source: © Shutterstock

Consider an African coalition of countries that collectively has access to all the strategic minerals needed for green industrial policies, complementary resources and capabilities, and the economies of scale needed for horizontal linkages across value chains for high-value-added joint industrial policies. What is lacking is access to the manufacturing technology to leapfrog rather than try to "catch up".

In summary, a brief sketch of the Bargain of the Century concept could be formulated as:

a. The African bloc of first movers (without China) co-designs its own joint industrialisation vision with a pre-agreed distribution of the value chain, ownership structure, distribution of the profit-wage share, protection of frontline mining communities, labour rights, human rights, and environmental and biodiversity protections.

b. Each African country in the coalition would pay for its labour and material costs in its national currency. Central banks within the coalition would be mandated to address imbalances and exchange rate pressures through central bank swap lines, regional settlement mechanisms, and other coordination mechanisms.

c. The African coalition offers to China the Bargain of the Century, which consists of China contributing in-kind as a joint-venture partner by sharing and transferring technology and know-how (including by developing the R&D, technical, vocational, and educational pipelines needed for the key industries that Africa wants to replicate, such as solar, wind turbines, geothermal, green transportation, etc.).

d. Why would China agree to this? First, China can significantly enhance its industrial footprint and geopolitical weight globally within a decade or two. Second, China would secure privileged access to strategic minerals, key resources, and potentially a very large consumer market with rising purchasing power. Third, China would relieve some internal economic pressures, such as excess productive capacity and US and EU trade restrictions on Chinese high-tech products.

e. Once the bargain with China is triggered (it need not be completed), this African bloc of first movers can then use this leverage to offer the same bargain same bargain to countries that have historically refused to share technology and never engaged in transformative development and industrialisation in Africa. Country X from the Global North might be offered an opportunity to come in as joint venture partner on similar terms in one of the key industrial priorities for Africa: renewable energy, green transportation, clean cooking, agricultural equipment, pharmaceutical production, medical equipment, and infrastructure for logistics, transportation, irrigation, sanitation, health, and education. In other words, these joint industrial strategies offer plenty of partnership opportunities, since all partners contribute in national currencies or in kind. As a result, the Bargain of the Century creates an opportunity for all African and Global South countries to join this coalition.

The Bargain of the Century – as defined here, on African terms – would simultaneously address many of the components of the so-called polycrisis: unipolarity, sovereign debt crises, climate crisis, failed SDGs, failed development, failed industrialisation, rising inequality, domestic and regional instability, trade and currency wars, and structural subordination of Africa and the rest of the Global South.

11. A Pan-African Secretariat for Structural Transformation, Diplomacy, and Strategic Partnerships

The *One Voice, One Strategy* joint industrial strategies blueprint is not meant to be another policy document celebrating all the wonderful possibilities Africa has. It is a call to action with practical steps that African Heads of State must take immediately. *One Voice, One Strategy* needs a **Secretariat** created by African Heads of State who agree to take responsibility as custodians of the seeds of Pan-African structural transformation, along the lines specified in this document.

The Secretariat should be co-chaired by a secondment from the High-Level Diplomatic Champions of the *One Voice, One Strategy* joint industrial strategies blueprint. Heads of State will appoint diplomatic envoys to engage with other African and Global South Heads of State, broaden the coalition of participants, enhance the complementarity of resources and capabilities within the bloc, and secure a larger bloc size for better economies of scale.

The Secretariat should also be supported by a team of technical experts and advisors who will ensure that all ministries across the bloc are carefully aligned and coordinated, ensuring meaningful participation and engagement with stakeholders affected by the joint industrial strategies – trade unions, vocational training associations, frontline communities, business associations, and civil society organizations working on land rights, biodiversity protection, human rights, corporate impunity, and beyond.

The Secretariat will be mandated to deliver four key outcomes. First, build a large coalition of African countries to form the first-movers bloc with high-level commitment to the *One Voice, One Strategy* blueprint and develop a strong diplomatic and geopolitical strategy for the Bargain of the Century framework. Second, deliver a technical blueprint that will be negotiation-ready for the Bargain of the Century framework, and that will be near implementation-ready. Third, deliver a communications strategy to educate the public and the media about the *One Voice, One Strategy* blueprint, and to build long-term support from the general public, academia, think tanks, trade unions, and civil society organisations. Fourth, mobilise the financial, technological, and institutional resources required to execute the *One Voice, One Strategy*, with particular emphasis on technology transfer, access to appropriate technologies, skills and knowledge transfer, and partnerships that strengthen Africa's productive and industrial capabilities as well as its research and development potential.

12. Concluding Remarks

The global economic order is entering a period of rapid transformation. Supply chains are shifting, energy systems are being rebuilt, and geopolitical alliances are taking new shapes. These changes present both risks and opportunities for Africa. If current patterns continue, the continent could remain a supplier of raw materials and a consumer of imported technology, and as a result, once again be positioned at the bottom of the global value chain. But if African countries coordinate strategically under a Pan-African economic and geopolitical strategy that prioritises collective reliance via the *One Voice, One Strategy* joint industrial strategies framework discussed above, then Africa could transform the continent into a major economic and geopolitical powerhouse in the 21st century. The question is not whether Africa has the resources, talent, or potential. The question is whether African Heads of State have the courage to think, act, and lead as a Pan-African unit to be reckoned with before the current window of opportunity closes. If they do, Africa will be unstoppable.

The term Pan-Africanism should not be used lightly. It's not the superficial meaning that some people use as a rhetorical and diplomatic expression of brotherhood, sisterhood and occasional solidarity of the convenient kind. **Pan-Africanism is the economics of industrialization, on African terms of socially and environmentally appropriate standards**, because without economies of scale, no African country can industrialize, and without social and environmental standards, no industrialization can deliver justice or sustainable prosperity to the African people. **Pan-Africanism is the economics of prosperity**, because without it Africa cannot become the economic powerhouse that it deserves to be in the global food, energy, transportation, logistics, finance, insurance, real estate, and manufacturing systems. **It's Pan-Africanism for Life!** Because the breakdown of all the life-sustaining systems (food, water, biodiversity, energy, health, etc.) is exacerbated by the climate crisis, dangerous distractions, and neocolonial greenwashing forms of extractivism and economic entrapment.

The *One Voice, One Strategy* Pan-African joint industrial strategies framework provides the opportunity to not only unleash Africa's potential for a just transition and green structural transformation but also to redraw the geopolitical map of the world by positioning Africa and the rest of the Global South at the centre of a new international economic order of peace, justice and sustainable prosperity. This has never been done before, because it means undoing colonial and imperial structures that have kept billions of people in poverty, and doing so without abusing nature, without throwing our own people under the bus, without invading or colonising any other nation,

and without inflicting revenge on former colonial and imperial nations. Africa can invite the world to join the continent in a win-win endeavour to benefit humanity.

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Africa stands at a historic crossroads. The global demand for critical minerals offers unprecedented opportunity, yet without a coordinated strategy, the continent is set to remain a mere supplier of raw materials that reproduces colonial extractive models.

One Voice, One Strategy argues that while no African nation can industrialise alone, the continent can succeed through unity. By coordinating policies, in alignment with visions such as Agenda 2063, Africa can build integrated value chains in e.g. batteries, electric mobility, and green steel, turning minerals into leverage for technological sovereignty rather than for simple exports.

Crucially, this approach calls for a redefinition of development itself. It moves beyond simple economic growth to prioritise human well-being, economic sovereignty and environmental stewardship. By firmly planning industrialisation with social justice, decent work, and ecological sustainability at the core, Africa can build economies that serve Africa's genuine needs rather than reproduce dependency.

Featuring practical approaches like regional specialisation, African Just Term Sheets, and a Pan-African Secretariat, this report provides a framework for securing the geopolitical repositioning – the Bargain of the Century – needed for Africa to actively re-shape the global economy. Written for African policymakers and stakeholders, *One Voice, One Strategy* is a call for decisive collective action for the common good.

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