Delhi Policy Group

Advancing India's Rise as a Leading Power

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African Union Emblem. Source: X/@_AfricanUnion
Heads of State and Government, African Union at the 7th Mid-Year Coordination Meeting to discuss Development and Continental Integration, in Equatorial Guinea, on July 13, 2025. Source: X/@_AfricanUnion

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African Pulse:

The Silent Scramble for Africa's Critical Minerals

Contents

The Silent Scramble for Africa's Critical Minerals

by
Ambassador Ruchira Kamboj & Arshiya Chaturvedi

Executive Summary

Today, our lives are being profoundly shaped by technology, drawing us into a techno-physical continuum. The intensifying climate crisis — along with the rise of related narratives of human development in harmony with nature[1] — is further accelerating the shift toward a technology-driven, climate-resilient, and sustainably developing world.

In support of this evolving, green, and synchronised physical-digital universe, the criticality of essential raw materials — commonly referred to as critical minerals and rare earth elements — cannot be overstated. From the ubiquitous smartphone to the surging global demand for electric vehicles (EVs), there is heavy demand for these finite resources. A global race to secure them has intensified, and this' silent scramble ' is reshaping modern geopolitics and geoeconomics.

This brief takes a closer look at the prevailing dynamics — the strategic importance of critical minerals and how various stakeholders are engaging with the issue. Africa increasingly lies at the heart of this conversation. The pivotal question is whether it will continue as a resource supplier, or is a nascent policy on value addition/beneficiation emerging?

Understanding Critical Minerals and Rare Earths

As the world increasingly faces climate change-induced events and related risks, policy makers are being compelled to actively pursue their "net zero" emissions targets for 2050.[2] To decarbonise a global economic system long intertwined with fossil fuels, a technological-fix approach has been adopted — one that promotes powering the economy through renewable resources.[3] Within this framework, the

[1] DeBoom, Meredith J. 2020. "Climate Necropolitics: Ecological Civilization and the Distributive Geographies of Extractive Violence in the Anthropocene." *Annals of the American Association of Geographers* 111 (3): 900–912. doi:10.1080/24694452.2020.1843995.

[2] IPCC. "Global Warming of 1.5°c an IPCC Special Report on the Impacts of Global Warming of 1.5°c above Pre-Industrial Levels and Related Global Greenhouse Gas Emission Pathways, in the Context of Strengthening the Global Response to the Threat of Climate Change, Sustainable Development, and Efforts to Eradicate Poverty WG I WG II WG III," 2018. https://www.ipcc.ch/site/assets/uploads/sites/2/2022/06/SR15_Full_Report_LR.pdf

[3] Dorn, Felix Malte, Robert Hafner, and Christina Plank. "Towards a Climate Change Consensus: How Mining and Agriculture Legitimize Green Extractivism in Argentina." *The Extractive Industries and Society* 11 (September 2022): 101130. https://doi.org/10.1016/j.exis.2022.101130

transition extends beyond green energy production to encompass other key sectors, including transportation, construction, manufacturing, and more.

This is where critical minerals — also referred to as "energy transition metals" (ETMs) or "battery minerals" — come into play. These are foundational metallic and non-metallic resources essential for the production of a wide range of advanced technologies, including mobile phones, solar panels, electric vehicle (EV) batteries, medical devices, and defence applications. Minerals such as lithium, nickel, cobalt, manganese, graphite, and copper are particularly vital, as they form the core components of lithium-ion batteries used in EVs and other energy storage systems.[4]

As for Rare Earth Elements (REEs), these are a subcategory of critical minerals, encompassing elements of the lanthanide series, scandium and yttrium. These elements are vital for producing high-performance magnets and miniaturised or compact electronic systems which are used in producing a wide range of technologies and technology products, such as EV motors, batteries, wind turbine generators, solar panels, hard disk drives, headphones and speakers, medical devices such as MRI machines, X- rays and advanced defence systems.[5]

While REEs are found in over 200 mineral ores across seven continents, their low concentrations within these ores make extraction and processing both technically challenging and economically expensive, giving rise to the label 'rare earths'.[6]

The 'Scramble' for Critical Minerals and Rare Earths

According to the International Energy Agency's (IEA's) 'Net Zero Emissions by 2050' (NZE) scenario, the demand for critical minerals such as lithium, cobalt, and graphite is estimated to increase 250 per cent by 2030[7], which will double up to 500 percent by 2050.[8] It is this surge in demand that has prompted countries to recognise the critical need for a strategic hold in the critical minerals supply chain, both upstream, involving exploration and extraction, and downstream, involving processing, refining, and the preparation of these minerals for industrial use and market sales.

Definitions of critical minerals lack uniformity—not only between countries, where geopolitical and economic considerations shape divergent lists, but even within

[4] Lebrouhi, B.E., S. Baghi, and Et al. "Critical Materials for Electrical Energy Storage: Li-Ion Batteries." *Journal of Energy Storage* 55 (November 2022): 105471. https://doi.org/10.1016/j.est.2022.105471.
[5] Balaram, V. "Rare Earth Elements: A Review of Applications, Occurrence, Exploration, Analysis, Recycling, and Environmental Impact." *Geoscience Frontiers* 10, no. 4 (July 2019): 1285–1303. https://doi.org/10.1016/j.gsf.2018.12.005
[6] Ibid
[7] IEA. "Implications – Critical Minerals Market Review 2023 – Analysis," 2023. https://www.iea.org/reports/critical-minerals-market-review-2023/implications.
[8] World Bank. "Mineral Production to Soar as Demand for Clean Energy Increases." World Bank, 2020. https://www.worldbank.org/en/news/press.

countries, where different departments adopt varying criteria. Thus while the United States Geological Survey 2023 (USGS) has identified 50 critical minerals as "essential to the economic and national security of the United States," the Department of Defense (DoD) maintains a broader list of over 250 "strategic materials" vital to military readiness and key civilian industries.[9]

Similarly, under the European Union's Critical Raw Materials Act, 2023, the EU has identified 34 critical raw materials as vital to its economy and a critical concern due to their vulnerability to supply change disruptions. Of these, 17 are specifically classified as "strategic" due to their heightened economic significance and the risks associated with global demand–supply imbalances.[10]

India has a list of 24 designated "Critical and Strategic Minerals" delineated in the Mines and Minerals Development and Regulation Act, 1957 (MMDR Act, 1957). This was expanded with the addition of six more minerals on the recommendation of a Committee formed under the Ministry of Mines in 2022.[11]

Africa's Critical Minerals Strength

The reserves of global critical minerals are spread across continents, but their predominant concentration in the developing world places Africa at the heart of today's green and digital transitions. The 54-member African Union is especially significant, with several of its member states holding vital reserves of minerals and rare earth elements (REEs) essential to clean energy technologies and high-tech manufacturing.[12]

The Democratic Republic of the Congo (DRC) stands as a global powerhouse in critical minerals, accounting for 70% of the world's cobalt production and holding 47% of global reserves.[13] It also possesses substantial deposits of coltan, graphite, lithium, and uranium, all essential for the green transition.[14]

South Africa dominates the global reserves of several high-demand minerals. It holds the world's largest known reserves of platinum group metals (PGMs) (88%),

[9] Runde, Daniel F., and Austin Hardman. "Elevating the Role of Critical Minerals for Development and Security." *Www.csis.org*, September 1, 2023. https://www.csis.org/analysis/elevating-role-critical-minerals-development-and-security.

[10] Ragonnaud, Guillaume . "Implementing the EU's Critical Raw Materials Act." European Parliamentary Research Service, November 224AD. https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/766253/EPRS_BRI(2024)766253_EN.pdf.

[11] Ministry of Mines. "National Critical Mineral Mission." Pib.gov.in, 2025. https://www.pib.gov.in/PressReleasePage.aspx?PRID=2120525.

[12] Boafo, James, Jacob Obodai, Eric Stemn, and Philip Nti Nkrumah. "The Race for Critical Minerals in Africa: A Blessing or Another Resource Curse?" *Resources Policy* 93 (June 1, 2024): 105046. https://doi.org/10.1016/j.resourpol.2024.105046.

[13] World Bank. "Cobalt In The Democratic Republic Of Congo." World Bank, 2021. https://documents1.worldbank.org/curated/en/099500001312236438/pdf/P1723770a0f570093092050c1bddd6a29df.pdf.

[14] Supra Note 1

manganese (80%), and chromite (72%). The country is also a significant contributor to other critical minerals, including titanium (10% of global share), zirconium (25%), vanadium (32%), vermiculite (40%), and fluorspar (17%). It holds 2% of global antimony reserves as well.[15]

Zimbabwe, South Africa's neighbour, is also richly endowed with PGMs and holds the fifth-largest lithium reserves on the continent.[16]

Zambia and the DRC are Africa's largest producers of copper, a cornerstone mineral for electrification and renewable technologies.[17]

Madagascar, Mozambique, and Tanzania collectively contribute to Africa's 21% share of global graphite reserves, while Mozambique and the DRC are also sources of rare earth elements.[18]

Namibia holds a variety of key minerals, including REEs [19]and tantalum[20], while Mali, Côte d'Ivoire, Gabon, and Ghana also feature prominently in Africa's critical mineral landscape with deposits of beryllium, tantalum, and other strategic resources.

Angola, South Africa, Malawi, and Namibia are home to a portion of Africa's 15% share of global REE reserves, underscoring the continent's growing relevance in the REE supply chain.[21]

A small but significant contributor, Guinea, holds 23% of the world's bauxite reserves, vital for aluminium production.[22]

Finally, according to the United States Geological Survey (USGS), Africa hosts 99 known REE deposit sites across 27 countries. Yet, only eight of these currently have active exploration projects, pointing to significant untapped potential.[23]

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[15] Minerals and Petrolium resource department . "Critical Minerals and Metals Strategy South Africa." Republic of South Africa, n.d. https://www.gov.za/sites/default/files/gcis_document/202505/critical-minerals-and-metals-strategy-south-africa-2025.pdf.

[16] Njini, Felix. "Zimbabwe Eyes World No.5 Lithium Spot as Chinese Investors Boost Capacity." *Reuters*, July 27, 2023. https://www.reuters.com/markets/commodities/zimbabwe-eyes-world-no5-lithium-spot-chinese-investors-boost-capacity-2023-07-27/

[17] Venditti, Bruno. "Which Countries Produce the Most Copper?" World Economic Forum, December 12, 2022. https://www.weforum.org/stories/2022/12/which-countries-produce-the-most-copper/.

[18] Supra Note 12

[19] International Trade Administration. "Namibia - Mining and Minerals." International Trade Administration U.S. Department of Commerce, February 29, 2024. https://www.trade.gov/country-commercial-guides/namibia-mining-and-minerals.

[20] Nabeel A. Mancheri, Benjamin Sprecher, Sebastiaan Deetman, Et. al. "Resilience in the tantalum supply chain, Resources, Conservation and Recycling." Volume 129, 2018, Pages 56-69. https://doi.org/10.1016/j.resconrec.2017.10.018.

[21] Bekoe, Dorina, Sarah Daly, and Et al. "Rare Earth Elements in Africa: Implications for U.S. National and Economic Security," 2022. https://apps.dtic.mil/sti/trecms/pdf/AD1204908.pdf.

[22] International Trade Administration . "Guinea - Market Overview." www.trade.gov, n.d. https://www.trade.gov/country-commercial-guides/guinea-market-overview.

[23] Ibid

China's Strategic Position in the Critical Minerals Landscape

China dominates the global supply chain of critical minerals and rare earth elements (REEs). This control is rooted in a two-pronged strategy: commanding the production of rare earths while simultaneously dominating the processing of other critical minerals sourced from around the world.

Significantly, China possesses the largest share of global REEs reserves.[24] Controlling both the upstream (mining) and downstream (processing and refining) activities, China accounts for 90% of the global REEs supply—a near monopoly in a sector vital for high tech applications.[25]

Beyond rare earths, it also commands the supply chain of other critical minerals, including lithium, cobalt, nickel, copper and graphite, which are not primarily located within China's territorial boundaries, through investing in and operating their mining and processing activities, especially in Africa.[26] As a result, even when raw materials are extracted elsewhere, the value chain often leads to China, which dominates the refining capacity for these minerals. This strategic control over the downstream process of the supply chain gives China considerable geopolitical and economic leverage.

However, the concentration and over-reliance on a single country have created significant vulnerabilities and supply chain risks — which the world has already begun to experience. In September 2024, China imposed an export embargo on antimony — a critical mineral used in semiconductors and munitions — effectively halting all shipments to the European Union. In December 2024, it banned the export of gallium, germanium, and antimony to the US, while also announcing a potential tightening of export controls on graphite—an essential element in EVs and energy storage batteries—by requiring exporters to obtain permits based on intended end-use. This was an extension of China's 2023 export control measures, which emphasised permits to export certain specified graphite products.[27]

In February 2025, additional export restrictions were introduced targeting materials like tungsten, tellurium, bismuth, indium, and molybdenum, all of critical usage in defence and high-tech industries. Furthermore, China imposed export controls on

[24] Li, Ling Zhi, and Xiaosheng Yang. "China's Rare Earth Resources, Mineralogy, and Beneficiation." *Elsevier EBooks*, January 1, 2016, 139–50. https://doi.org/10.1016/b978-0-12-802328-0.00009-7.
[25] Park, Sulgiye, Cameron L Tracy, and Rodney C Ewing. "Reimagining US Rare Earth Production: Domestic Failures and the Decline of US Rare Earth Production Dominance – Lessons Learned and Recommendations." *Resources Policy* 85 (August 1, 2023): 104022–22. https://doi.org/10.1016/j.resourpol.2023.104022.
[26] International Energy Agency. "The Role of Critical World Energy Outlook Special Report Minerals in Clean Energy Transitions," 2022. https://iea.blob.core.windows.net/.
[27] IEA. "Global Critical Minerals Outlook 2025." International Energy Agency (IEA), May 2025. https://iea.blob.core.windows.net/

seven medium and heavy REEs, which were samarium, gadolinium, terbium, dysprosium, lutetium, scandium, and yttrium.[28]

India, too, has been subjected to China's critical minerals export restrictions since mid-2023. Export has been curbed to India for minerals which are crucial for its electronics, EV, and defence sectors, including gallium and germanium. Further, in late 2024, even graphite was added to this restricted list, significantly impacting India's battery manufacturing industry.[29]

While these export bans primarily impact the targeted countries, their ripple effects are felt across global markets, influencing other economies as well. Studying the effect of China's February 2025 export controls, the IEA's Global Critical Minerals Outlook 2025, observed that these export measures triggered a sharp increase in the prices of several key minerals. Illustratively, the price of bismuth—a mineral in which China has the dominant share in global production—surged by nearly 90%, touching an all-time high in March 2025. Many other countries are also adopting these tactics of restrictive export measures to influence the global prices of critical minerals they control. For instance, in February 2025, the DRC—the world's largest cobalt supplier—announced a four-month suspension of cobalt exports to control falling prices.[30]

The Players in the Scramble: Who's Doing What?

Recognising these vulnerabilities, the major players are undertaking policy action to reduce their dependence on single-source countries and strengthening their strategic positioning in the critical minerals supply chain.

For instance, shortly after assuming office—for his second term—President Trump issued an executive order to boost critical minerals access and reduce reliance on foreign sources, through an extensive investment in domestic and international minerals extraction and processing activities.[31] Statutes—including the Infrastructure Investment and Jobs Act (2021)[32] and the Defence Production Act (1950)[33] —are being proactively invoked to address supply chain vulnerabilities and enhance domestic production of critical materials and technologies.

The US's critical minerals strategy also includes forging international partnerships. For instance, the United States and Norway signed a "Memorandum of Cooperation

[28] Ibid
[29] PTI. "China Mineral Curbs a Wake-up Call for India, Urgent Steps Needed: GTRI." The Economic Times. Economic Times, July 3, 2025. https://economictimes.indiatimes.com/
[30] Supra Note 27
[31] Executive Order. "Immediate Measures to Increase American Mineral Production." The White House, March 20, 2025. https://www.whitehouse.gov/presidential-
[32] IEA. "Infrastructure and Jobs act: Critical Minerals." International Energy Agency (IEA), July 2024. https://www.iea.org/policies/14995-infrastructure-and-jobs-act-critical-minerals
[33] Supra Note 31

on High-Standard, Market-Oriented Trade of Critical Minerals" in 2024 to strengthen collaboration on building secure, transparent, and sustainable supply chains in critical mineral markets.[34] In 2022, the US also launched a multilateral Minerals Security Partnership with 14 partner countries and the EU.[35] In 2023, India became the 14th member to join the initiative, which aims to support and jointly finance global projects across the entire value chain, including mining, processing, production and recycling of critical minerals.

The European Union has also taken significant steps towards ensuring a stable and secure supply chain for its economies. The Critical Raw Materials Act (CRMA), enacted by the European Parliament in December 2023, seeks to reduce the region's dependence on third countries for essential raw materials to support its green transition.[36] The EU is also proactively negotiating with several African nations, such as the DRC, Namibia, Rwanda, Gambia, and Zambia, for critical minerals sourcing.[37] In this respect, on March 25, 2025, the European Commission published a list of 47 Strategic Projects covering 14 out of the 17 "strategic" materials as identified in the CRMA.[38] These projects pertain to key battery materials, including lithium, nickel, cobalt, manganese, and graphite.

In April 2025, the Government of India launched the National Critical Minerals Mission (NCMM), a comprehensive framework for achieving self-reliance in the critical minerals sector. Under the NCMM, the Geological Survey of India (GSI) is set to undertake around 1,200 exploration projects between 2024–25 and 2030–31.[39] On the international front, India is participating in the multilateral US-led Minerals Security Partnership[40], while also forging bilateral engagements with resource-rich nations such as Australia, Argentina, Zambia, Peru, Zimbabwe, Mozambique,

[34] The White House. "Joint Statement from the United States and Norway on Cooperation on High-Standard, Market-Oriented Trade of Critical Minerals ." The White House, April 17, 2024. https://bidenwhitehouse.archives.gov/.
[35] Department of State. "Minerals Security Partnership." The US Department of State. https://2021-2025.state.gov/minerals-security-partnership/
[36] European Commission. "European Critical Raw Materials Act." commission.europa.eu, March 16, 2023. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal/green-deal-industrial-plan/european-critical-raw-materials-act_en.
[37] Tenev, Martin. "Material World: How Europe Can Compete with China in the Race for Africa's Critical Minerals." ECFR. European Council on Foreign Relations (ECFR), November 7, 2024. https://ecfr.eu/publication/material-world-how-europe-can-compete-with-china-in-the-race-for-africas-critical-minerals/.
[38] EC . "Commission Selects 47 Strategic Projects to Secure and Diversify Access to Raw Materials in the EU." European Commission (EC), 2025. https://ec.europa.eu/commission/presscorner/detail/en/ip_25_864.
[39] Supra Note 11
[40] Ministry of Mines. "Strengthening Of Mineral Supply Chains." Press Information Bureau, The Government of India. August 2023. https://www.pib.gov.in/PressReleaseIframePage.aspx?PRID=1946416

Malawi, Côte d'Ivoire[41] and Sri Lanka[42]. In May 2025, Khanij Bidesh India Ltd signed an MoU with Australia's Critical Minerals Office to facilitate joint minerals exploration efforts.[43] The recently signed India-EU Trilateral Cooperation Framework[44] (June 2025) also offers a promising opportunity for the two sides to jointly develop critical minerals infrastructure and help secure diversified, resilient supply chains through a collaborative engagement with third countries in Africa.

The Double-Edged Sword: Impact on African Nations

While this sudden surge in global demand for critical minerals presents a significant opportunity for African countries to leverage their resource wealth, the reality is far more complex and bleak. Past experiences of resource extraction across the continent have often resulted in large-scale dispossession, systemic violence, and deep social, ecological, and biological harm to local populations. The infamous issues of blood diamonds (or Conflict Diamonds)[45] and uranium extraction[46] are among the many examples that highlight states' failures to translate their resources, under the "principle of permanent sovereignty", into meaningful national development, and instead leave peripheral communities in abject conditions.

This phenomenon was extensively examined in a study on the experiences of six developing oil-exporting nations, namely, Algeria, Ecuador, Indonesia, Nigeria, Trinidad and Tobago, and Venezuela, from the 1960s to the 1980s[47], focusing primarily on how their oil revenues impacted their economic and political development. Later in 1993, the economic geographer Richard Auty defined it as a "resource curse", a paradox of plenty, where countries rich in natural resources often experienced slower economic growth, weaker governance, and heightened conflict.[48]

[41] Department of Atomic Energy. "Parliament Question: Rare Earth Minerals." Press Information Bureau, The Government of India. July 2023. https://www.pib.gov.in/PressReleasePage.aspx?PRID=2147282
[42] Ministry of Mines. "India and Sri Lanka Strengthen Ties in Critical Minerals, Exploration, and Mining." Press Information Bureau, The Government of India. February 2025. https://www.pib.gov.in/PressReleasePage.aspx?PRID=2103502.
[43] Ministry of Mines. "India's Efforts to Attain Self-Reliance in Critical and Strategic Minerals." Press Information Bureau, The Government of India. March 2022. https://www.pib.gov.in/PressReleasePage.aspx?PRID=1810948
[44] Directorate-General for International Partnerships. "EU and India Agree to Develop Trilateral Cooperation." International Partnerships, the EU, June 11, 2025. https://international-partnerships.ec.europa.eu/news-and-events/news/eu-and-india-agree-develop-trilateral-cooperation-2025-06-11_en
[45] Presnall, Anna. "Blood Diamonds – UAB Institute for Human Rights Blog." sites.uab.edu, December 23, 2019. https://sites.uab.edu/humanrights/tag/blood-diamonds/.
[46] Supra Note 1
[47] Chekera, Y. T., and V. O. Michelle. "The International Law Principle of Permanent Sovereignty over Natural Resources as an Instrument for Development: The Case of Zimbabwean Diamonds." *African Journal of Legal Studies* 6 (1): 69–101. 2013. https://doi.org/10.1163/17087384-12342021.
[48] Auty, Richard M. *Sustaining Development in Mineral Economies: The Resource Curse Thesis*. 1st ed. London: Routledge, 1993. https://doi.org/10.4324/9780203422595.

For Africa to truly benefit from its critical mineral wealth, resource exploitation must be effectively managed, with clear minimum standards in place to ensure a responsible and ethical global transition to a technology-driven, green future.

The Beginnings of a Beneficiation Strategy

Studies indicate that African countries currently collect only up to 40% of the total potential revenue generated from resource extraction.[49] This is because Africa's existing mining sector enjoys limited value addition. As well, governance, infrastructure and structural constraints add to the challenges.

An endeavour is however starting to be reverse the situation, including through regional policy instruments—with the intent to regulate Africa's mining sector and ensure that its mineral wealth benefits its peoples. One such policy effort is the Africa Mining Vision (AMV), adopted in 2009 by African Union Heads of State and Government. This is a strategic policy document aimed at promoting inclusive and sustainable mineral exploitation, with the broader goal of transforming Africa into a global powerhouse of the future. It provides for a governance framework for monitoring and evaluating implementation of the AMV's objectives across nine key areas of the mineral value chain. These include mineral revenue and rent management, human and institutional capacity building, sectoral governance, research and development, environmental and social sustainability and infrastructure development, among others.[50] As always, though, the key lies in implementation. A proactive adoption and implementation strategy is an imperative—more critical now than ever with expanding mining operations due to the global demand for critical minerals.

Several African countries are also beginning to take decisive steps to develop and implement national mineral strategies that align with their developmental priorities. Zimbabwe has banned the export of raw lithium ore[51], a move aimed to press foreign companies to invest in domestic processing facilities. Similarly, Ghana has enacted a policy that mandates value addition for its lithium[52], ensuring that it captures a larger share of the value chain. South Africa's National Minerals Beneficiation Strategy

[49] Akiwumi, Paul Akiwumi. "How Africa Can Harness Critical Mineral Wealth to Revamp Economies | UNCTAD." UNCTAD, June 3, 2024. https://unctad.org/news/how-africa-can-harness-critical-mineral-wealth-revamp-economies.

[50] AU. "Africa Mining Vision (AMV) ." African Union (AU), February 2009. https://au.int/en/documents/20100212/africa-mining-vision-amv.

[51] Reuters. "Zimbabwe Bans Raw Lithium Exports to Curb Artisanal Mining." *Reuters*, December 21, 2022, sec. Africa. https://www.reuters.com/world/africa/zimbabwe-bans-raw-lithium-exports-curb-artisanal-mining-2022-12-21/.

[52] Soulé, Folashadé , Mawuenyega Makafui Butu, and Emmanuel Amoah Darkwah. "Can Critical Mineral Deals Benefit Local Communities? Insights from Ghana's Lithium Project." Carnegie Endowment for International Peace, 2025. https://carnegieendowment.org/research/2025/07/can-critical-mineral-deals-benefit-local-communities-insights-from-ghanas-lithium-project?lang=en.

emphasises domestic exploration, beneficiation at source, research and development, regional integration, innovative financial instruments, and energy security to achieve environmental sustainability, social justice, and economic equity.[53] Local beneficiation is also a key agenda item of South Africa's G20 Presidency, and is directly linked to its theme of 'Solidarity, Equality, and Sustainability'.[54] President Cyril Ramaphosa has clearly articulated that he will use the G20 platform to champion the use of critical minerals as an engine for growth and development in South Africa—advocating for frameworks and investment that support local value addition rather than just the construction of infrastructure that is solely for the purpose of 'pit to port' exports of raw materials. 'Africa will never prosper for as long as we send all our raw materials abroad and rely on factories far from our shores for the finished goods and advanced services that we use…' President Ramaphosa has declared on 'X'[55]

Bilateral and intra-continental cooperation is also making significant headway. In February 2025, Nigeria and South Africa signed a mineral mining cooperation agreement for joint exploration and downstream refining and processing of critical minerals like lithium and iron ore.[56] In 2022, the DRC and Zambia agreed to collaboratively develop a value chain in electric batteries and strengthen their standing in the clean energy sector.[57] The East African Crude Oil Pipeline project[58], involving Uganda and Tanzania, is another example—serving as a powerful model for how African nations can collaborate on large scale infrastructure projects to add value and secure their resources.

The African Continental Free Trade Area could be a potential game changer, in this regard. With its emphasis on a unified continental market, it aims to foster regional value chains, allowing African nations to trade with one another—thereby reducing their dependence on external markets. Instead of competing for foreign investment, the vision is to build a collective economic bloc with greater bargaining power—a powerful tool to resist unfavourable terms from global powers.

Finally, African nations are engaging in strategic diplomacy—with a multiplicity of actors as opposed to just one. The intent is to secure the best deal in the national interest, and in pursuit of their national development goals. Simply put: in this new

[53] Supra Note 15
[54] G20 2025. "G20 Presidency." G20.org, 2024. https://g20.org/g20-south-africa/g20-presidency/.
[55] X/@CyrilRamaphosa
[56] Camillus Eboh. "Nigeria Signs Minerals Pact with South Africa in Diversification Push." *Reuters*, April 17, 2025. https://www.reuters.com/world/africa/nigeria-signs-minerals-pact-with-south-africa-diversification-push-2025-04-17/.
[57] UNECA. "Zambia and DRC Sign Cooperation Agreement to Manufacture Electric Batteries | United Nations Economic Commission for Africa." United Nations Economic Commission for Africa (UNECA), April 29, 2022. https://www.uneca.org/stories/zambia-and-drc-sign-cooperation-agreement-to-manufacture-electric-batteries.
[58] East African Crude Oil Pipeline (EACOP). "Overview – EACOP ," https://www.eacop.com/overview/.

geopolitical landscape, Africa's mineral wealth is not just a resource to be extracted, but a strategic asset to be leveraged for a more equitable and sustainable future. 'As a region we must replace the colonial extractive model with regional value chains, anchored in our resources, driven by our youth and fuelled by innovation…' asserted the G20 Presidency at the recently concluded Liberation Movements Summit in South Africa.[59]

This notwithstanding, there remains much more that can be done to achieve meaningful results. African countries must intensify and better coordinate their efforts to ensure that natural resource wealth becomes a driver of sustainable and inclusive development—rather than a source of conflict or enduring dependency.

Conclusion

The rapidly evolving geopolitical agenda around critical minerals — driven by technological advancement and the push for a green transition — has placed Africa at a pivotal juncture. The continent's vast reserves of critical and strategic resources offer tremendous economic and geopolitical opportunities, but also present complex governance, environmental, and socio-political challenges. Whether this critical mineral scramble is Africa's powerful lever for transformation or merely reproduces historical patterns of exploitation and conflict will depend on the choices made by key stakeholders, including African governments, international partners, and private enterprises. Prima facie, there appears to be a pressing need for African leaders to prioritise strategic governance and regional cooperation, and for the global community to support the creation of minimum-condition frameworks that promote fairness, transparency, and local empowerment. If rigorously pursued, this approach can enable truly equitable development — rejecting utilitarian models that justify harm to a few for the benefit of many, and ensuring instead that prosperity is shared and no one is left behind.

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