

ROUND TABLE ON AFRICA'S CRITICAL MINERAL RESOURCES

29–30 August 2024, Lusaka, Zambia



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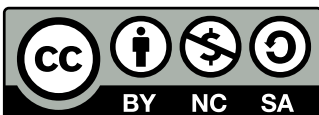


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Abbreviations

AMV	Africa Mining Vision
AU	African Union
G7	Group of Seven
JETP	Just energy transition partnership

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EXECUTIVE SUMMARY

On 29–30 August 2024, the International Institute for Democracy and Electoral Assistance (International IDEA), in collaboration with Southern Africa Resource Watch, held a high-level technical round table on Africa's critical mineral resources, in Lusaka, Zambia. The round table was held in the context of the growing call for a transition to renewable, low-carbon energy. The purpose of the event was to bring together practitioners, experts, civil society and government representatives to discuss how Africa can position itself to benefit from its critical mineral wealth and protect itself and its environment against exploitation. Discussions during the round table focused on the following themes and subthemes: (a) geopolitics and its impact on Africa's resources in the context of the energy transition; (b) mineral governance in Africa and the problem of extractives; (c) the beneficiation of critical minerals in Africa; (d) Just Energy Transition Partnerships in Africa; and (e) recommendations. Key issues that emerged in the discussions were the scramble for Africa's critical mineral resources and the fact that Africa is ill prepared to protect itself against the risk of exploitation. The following key insights and broad recommendations were discussed at the end of the round table:

1. There is a need for unified governance across the African Union and at the regional and national levels to enhance Africa's bargaining power in global markets. The Africa Mining Vision must be ratified to guide resource management and promote unified mineral governance across the continent.
2. African policies must be reformed to position Africa as a key player in the global geo-economy rather than just a supplier of raw materials. Institutions must be empowered to implement policies effectively, with a focus on policy domestication and harmonization.
3. The transition to green energy in Africa must be balanced with the use of fossil fuels to drive industrialization. Without fossil fuels, Africa cannot generate the energy needed for large-scale mining and industrial activities.

Domestic capital investment must be mobilized to finance sustainable development.

4. Africa's progress is dependent on removing tariffs and other barriers to the movement of goods, services and people. Intra-African trade and free mobility are essential for the growth of domestic capital and industrialization.
5. A home-grown African finance mechanism is needed to reduce dependence on traditional international financing agencies, whose loans often come with exploitative conditions. Africa must develop resilient financial models that can withstand global economic shocks.
6. Africa must build and rely on Indigenous expertise for negotiating and managing trade agreements. Such expertise would reduce reliance on external arbitration, thereby ensuring fairer deals in mineral resource contracts.
7. Africa must prepare for the global shift towards recycling and alternatives to key minerals. Investing in research, innovation and youth training is crucial to maintaining Africa's position in the global market.
8. Governments must adopt transparent governance practices, involve civil society and raise awareness of the importance of green minerals and resource governance.
9. Africa must invest in research in order to produce comprehensive, up-to-date geological data.

INTRODUCTION

On 29–30 August 2024, the International Institute for Democracy and Electoral Assistance (International IDEA), in collaboration with Southern Africa Resource Watch, held a high-level technical round table on Africa's critical mineral resources, in Lusaka, Zambia. The round table was held in the context of the growing call for a transition to renewable, low-carbon energy. For example, during the 28th United Nations Climate Change Conference, held in Dubai in 2023, governments agreed to triple global renewable energy capacity by 2030. A successful transition to renewable, low-carbon energy will have to rely to a large extent on what are popularly known as 'green minerals' or 'critical minerals', including copper, lithium and nickel.

Africa stands at a pivotal moment in the global shift towards a low-carbon future, driven by its abundance of critical minerals and its potential in green hydrogen fuel cell technology. Given that the International Energy Agency predicts a sixfold increase in critical mineral demand by 2040 to support the clean energy transition, Africa finds itself at the centre of strategic competition among global powers. This central role stems from the fact that the continent holds 30 per cent of the world's mineral reserves that are critical for renewable energy technologies, including cobalt, copper, graphite, lithium, nickel, platinum group metals and rare earth elements.

Global powers, including China, the European Union, Russia and the United States, in addition to emerging powers, such as India, Japan and Qatar, are investing heavily in extracting Africa's minerals. Seventy per cent of these minerals are exported from Africa in raw form, meaning that Africa does not realize the full value of its mineral endowments and is unable to take advantage of its mineral wealth to address the pressing problems of poverty, climate change and unemployment. In fact, the continent is being impoverished, and its environment has suffered serious damage as a result of exploitative mining activities.

Africa stands at a pivotal moment in the global shift towards a low-carbon future, driven by its abundance of critical minerals and its potential in green hydrogen fuel cell technology.

In one of his recent addresses, the UN Secretary-General pointed to this problem and said:

A world powered by renewables is a world hungry for critical minerals. For developing countries, critical minerals are a critical opportunity to create jobs, diversify economies, and dramatically boost revenues. But only if they are managed properly. The race to net zero cannot trample over the poor. The renewables revolution is happening—but we must guide it towards justice.
(United Nations n.d.)

Therefore, a critical question arises as the world seeks to transition to renewable, low-carbon energy: how can world leaders ensure that the mining and trading of critical minerals are conducted with adequate concern for the people and the environment in Africa?

The high-level round table on Africa's critical mineral resources sought to discuss and address this question. Participants included academics, pan-African experts in mineral resource policy development, private consultants in environmental impact assessment, government representatives and civil society.

The round table sought to achieve the following four objectives:

- to explore the links between Africa's critical minerals and global geopolitics;
- to assess Africa's capacity to localize beneficiation and develop sustainable practices;
- to examine the role of African countries in regulating and attracting investment; and
- to investigate the role of civil society in a just energy transition.

Discussions at the round table focused on the following themes and subthemes: (a) geopolitics and its impact on Africa's resources in the context of the energy transition; (b) Africa's mineral governance and the problem of extractives; (c) critical mineral beneficiation in Africa; (d) Just Energy Transition Partnerships in Africa; and (e) recommendations. This report highlights key issues that emerged during the discussions under each of these themes and subthemes.

Chapter 1

THE CONTEXT

In order to set the context for the discussions, the round table began with an opening ceremony, during which Gram Matenga, Head of Programmes for the Africa and West Asia region at International IDEA, welcomed the participants and outlined the rationale for and objectives of the round table. The guest of honour, Honorable Paul Kabuswe, Zambia's Minister of Mines and Minerals Development, delivered the keynote address, in which he highlighted the following key issues:

1. Africa is endowed with most of the critical minerals required for a just energy transition and thus has the opportunity to be the key driver of this transition. For example, 70 per cent of the world's total future supply of cobalt is estimated to be in the Democratic Republic of the Congo (DRC) and Zambia.
2. Global powers, including China, the EU, Russia and the USA, and other emerging powers are engaged in a serious competition for critical minerals from Africa. They have detailed plans and strategies on accessing and controlling Africa's resources for their own development, industrialization and modernization. Africa, on the other hand, has no proactive strategy for the extraction and beneficial exploitation of its resources, let alone on how to protect its resources from falling under the control of global actors.
3. In order to benefit fully from its minerals, Africa needs to develop and implement policy frameworks which ensure value addition rather than exporting raw mineral resources to the rest of the world. In addition, adequate policy frameworks must be developed and implemented to ensure that individuals and local communities benefit from the mining of these minerals, and that the environment is protected.

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Chapter 2

GEOPOLITICS AND AFRICA'S CRITICAL MINERAL RESOURCES

Understanding the global political and economic architecture is critical for one to appreciate the impact of geopolitics on Africa's mining sector in the context of the energy transition. Historically, Africa has been the source of resources for industrialization in Europe and the USA. Major resources extracted from Africa include minerals and labour, especially during the slave trade and colonialism period.

Africa is key to the energy transition but is also at risk of serious exploitation as a result of the geopolitical competition for the minerals that are critical for the energy transition.

Africa is key to the energy transition but is also at risk of serious exploitation as a result of the geopolitical competition for the minerals that are critical for the energy transition. The key competitors for these minerals include China, the EU, India, Japan, Russia, Saudi Arabia, South Korea, the United Arab Emirates and the USA. The ongoing geopolitical competition for these minerals has ushered in a third wave in the scramble for African resources by global powers. The first wave took place in 1896, when European powers, at the Berlin Conference, divided Africa into colonies. The second wave took place in the early 1990s and was characterized by civil wars, including in Angola, the Democratic Republic of the Congo, Liberia, Mozambique, Nigeria and Sierra Leone. These civil wars were a result of competition for control of African mineral resources, predominantly by former European colonial powers and the USA as part of their neocolonial strategy on Africa. The third wave in the scramble for Africa, which is ongoing, revolves around the competition among global powers for green minerals, which include chromium, cobalt, copper, graphite, lithium, manganese, nickel and platinum.

Unlike the first two waves (in 1896 and the 1990s), the ongoing third wave in the scramble for African green minerals has a wider pool of global competitors: in addition to European countries and the USA, they include China, India, Japan, Qatar, Russia, Saudi Arabia and South Korea.

China's leadership in the Fourth Industrial Revolution, particularly in solar energy and lithium battery production, has positioned it as a serious global competitor for African mineral resources. As part of its strategy, China has

launched various projects aimed at exploiting African green minerals. For example, the Lobito Corridor project mainly serves as a means to extract minerals rather than fostering genuine development. The Lobito Corridor meanders through areas where minerals are located and is thus part of China's strategy of developing infrastructure to siphon resources out of Africa.

Southern and West Africa are very much at the receiving end of this third wave in the scramble for Africa because these regions are endowed with a lot of green minerals. For example, the DRC, Ghana, Mali, Namibia and Zimbabwe are rich in lithium, making them targets in the ongoing scramble.

The third wave in the scramble for African resources has revived global Cold War cleavages, particularly in regions rich in critical minerals. For example, France and Russia are engaged in an intense struggle to control the Sahel region, which has contributed to political instability, as exemplified by the recent wave of military coups in the region. In East Africa and in the Southern African Development Community, there are rifts between countries and leaders (including the DRC, Rwanda, Zambia and Zimbabwe), which are linked to the competition between Russia and the USA for African resources.

Global powers are convening international platforms to coordinate their scramble for African minerals. During the Sapporo Climate, Energy and Environment Ministers' Meeting 15–16 April 2024, in Japan for example, the Group of Seven (G7) countries developed a five-point plan on how they should prepare for the new scramble for green minerals. As part of this plan, the G7 countries resolved to:

- establish a task force to regularly forecast the state of supply of and demand for critical minerals and how supply can be secured to meet growing demand;
- develop new mines and supply chains responsibly;
- identify initiatives to promote recycling of critical minerals at the global level and share capabilities. This will include programmes such as recycling and increasing energy storage capacities of batteries;
- promote innovative strategies for saving resources and substituting technologies based on a holistic approach; and
- prepare pre-emptive response strategies for possible supply chain disruptions.

Global powers are using the World Trade Organization to try to increase protection of their exploitative investments in Africa's mining sector, as part of their strategy to secure their green mineral supply chains. Another key aspect of this strategy—employed by transnational corporations in addition to global powers—involves the capture of African countries. International aid is also being weaponized to exert pressure on Africa and exploit its mineral resources.

Africa must develop and adopt a common regional position, focusing more on how the people of the continent and its environment can derive maximum benefit from its resources.

For example, reports suggest that the USA is demanding that, for countries to continue benefiting under the African Growth and Opportunity Act, they must be open to American exploration of their critical minerals, and they must share their geological data with the USA.

When responding to these global forces, African countries must learn from past experiences (from the first and second waves described above) and must avoid unilateral, bilateral and trilateral approaches to addressing the threats posed by the scramble for the continent's resources. Africa must develop and adopt a common regional position, focusing more on how the people of the continent and its environment can derive maximum benefit from its resources. The strategy should incorporate the need to ensure countries' security and stability, adopt a regulatory framework to ensure that 51 per cent of minerals belong to the country where they are located and establish regional research hubs to promote continuous research as well as knowledge development and exchange.

Ongoing efforts by the African Union (AU) to develop a continental critical minerals strategy must be accelerated and supported in order to galvanize Africa into taking a regional position. The establishment of the African Continental Free Trade Area should be part of Africa's continental strategy to address some of the trade-related problems arising from the scramble for green minerals. Civil society and academia have an important role to play in holding governments accountable, including in respect of countries' obligation to enact and implement the necessary laws and policies, in addition to building strong institutions.

These efforts must be complemented by robust and innovative education policies targeting young people. With over 70 per cent of Africa's population under 35, young people represent significant potential for driving innovation and economic development. However, there is a need to build the capacity of young people through education, including to expand their awareness of the geopolitical competition for resources and how they can position themselves as competitive entrepreneurs whose enterprises will benefit their communities.

Chapter 3

AFRICA'S MINERAL GOVERNANCE AND THE PROBLEM OF EXTRACTIVISM

Three key factors are enabling other countries to siphon Africa's mineral resources—poor governance on the continent, corruption, and conflict and instability. The artisanal mining sector is vulnerable to manipulation by mining elites and has become a major avenue for siphoning resources from the continent.

The siphoning of resources is accompanied by serious damage to the environment. In Nigeria, for example, several multinational companies, including from China and Europe, are complicit in destroying the environment through oil spills and gas flaring.

The Africa Mining Vision (AMV) aims to address some of the issues outlined above. However, the AMV faces two major challenges. First, the majority of countries have not adopted it, and the few that have done so are yet to translate the vision into their national laws and policies, meaning that the AMV remains largely unimplemented in several AU member states. Second, the AMV was developed 15 years ago and thus may have been overtaken by events. It is in urgent need of review, adaptation and accelerated adoption by AU member states.

Enforcing transparency and accountability is critical to ensuring that the AMV and other laws and policies are fully implemented, and to pushing African leaders to adopt a progressive shared position on the exploration of green minerals. Ghana's Public Interests and Accountability Committee serves as an example of an institutional mechanism aimed at improving transparency and accountability in resource governance. However, enforcing transparency and accountability first requires public awareness of the critical issues, including the extent of the availability of minerals, the nature of governments' obligations in respect of the exploration of those minerals, the rights of communities associated with those minerals and the environment.

Three key factors are enabling other countries to siphon Africa's mineral resources—poor governance on the continent, corruption, and conflict and instability.

There is a need to adopt a raft of political, economic and institutional reforms to align efforts at the regional and national levels with the continental strategy and vision.

In addition, Africa needs to establish a common and dynamic market for the exploration of African minerals by Africans. Such a market cannot be created, however, without accelerating regional integration.

There is a need to adopt a raft of political, economic and institutional reforms to align efforts at the regional and national levels with the continental strategy and vision, and to ensure the equitable sharing of revenue between governments, communities and private companies. In this regard, the development of a continental mining code should be considered.

Africa should establish a mechanism to regularly identify and assess risks and threats arising from the ever-changing geopolitical context. Establishing unity among African countries is also key if Africa is to adopt a common position and strengthen its capacity to address threats and risks arising from the geopolitical context.

As part of its continental strategy, Africa must develop and agree on a common list of critical minerals. This strategic action must be followed up and complemented by efforts to scale up industrialization in Africa in order to ensure that minerals are beneficiated on the continent rather than being exported as raw materials.

Chapter 4

POLICY FRAMEWORKS AND CRITICAL MINERAL BENEFICIATION IN AFRICA

The Africa Mining Vision and the African Commodities Strategy are the main AU policies on the question of critical mineral beneficiation in Africa. The AMV sets out an action plan on the measures which countries must adopt and the targets to be achieved. There is a need to assess African countries' compliance with the action plan and the targets set out in the AMV.

The competition for Africa's minerals is increasing as new players join the scramble for these minerals. At the same time, traditional players, such as the EU, have been intensifying their efforts to extract and exploit African resources. For example, the EU's critical minerals legislation makes it compulsory for 75 per cent of Africa's raw materials to be processed in Europe in order to create jobs for European citizens.

Thus, the global players are clearly making concerted efforts to push their own interests, and yet Africa is still divided. In response, African countries are negotiating individual agreements with regional blocs, such as the EU, and with powerful global players, such as China and the USA. In the process, these African countries do not have much leverage individually to get the best deal from these negotiations and agreements.

The idea that developing countries should benefit from and add value to their supply chains is recognized globally, including by the UN. It is important that African governments take measures to that effect. The production of electronics, including the manufacturing of batteries, is one of the areas which African governments can invest in to promote beneficiation. Another sector is the assembly of electric vehicles.

Some African countries have made commendable efforts to become the beneficiaries of their mineral wealth. For example, the DRC and Zambia are working together to establish a battery production plant in Ndola, Zambia, which will benefit from cobalt and other minerals from the DRC. In Zambia, a centre of excellence in critical mineral development has been established at

The Africa Mining Vision and the African Commodities Strategy are the main AU policies on the question of critical mineral beneficiation in Africa.

the University of Zambia. Part of its mandate is to act as a think tank providing strategic advice and technical support to drive beneficiation.

However, these kinds of efforts would be stronger and would have a better chance to succeed if they involved a continental approach, as opposed to being pursued as part of bilateral relations between countries. A continental approach would increase the harmonization of efforts, could be cost-effective and would avoid the unnecessary duplication of efforts. This approach would also enhance the bargaining power of African countries in negotiations, including when negotiating investment agreements and funding to finance beneficiation initiatives.

In addition, Africa must first develop the necessary infrastructure, including electricity generation and supply systems. African countries are already losing out on this front, mainly due to a lack of political will among government leaders and, in some cases, a lack of the necessary technologies. Efforts to develop infrastructure that is necessary for promoting beneficiation are also being sabotaged by political instability, which some global powers are sponsoring. For example, the DRC attempted to build a refinery in Kolwezi, but when the project was announced, a war broke out in the region. The conflict is closely linked to global powers with a vested interest in continuing to plunder minerals from the DRC.

Beneficiation is capital-intensive, which poses a serious challenge for Africa. For example, it has been estimated that the cobalt processing and battery manufacturing plant being jointly pursued by the DRC and Zambia will require USD 300 billion, and it could take between 11 and 20 years to recoup the capital investment.

Transnational companies are the main culprits responsible for depleting the continent's mineral resources and polluting and destroying the environment in Africa.

Transnational companies are the main culprits responsible for depleting the continent's mineral resources and polluting and destroying the environment in Africa in many ways that are never accounted for. This damage is fuelling the climate crisis, which is being manifested in the form of droughts, floods, heatwaves and other extreme weather events. The economic costs of managing the climate crisis are rising, which could erode all the potential revenue generated by Africa's trade in green minerals. In addition, the excessive costs of climate change management are driving several countries into serious debt, which is contributing to the debt crisis across the continent and further undermining African countries' capacity to invest in beneficiation.

The global financial architecture is designed to exploit, rather than develop, Africa. Developing countries, most of which are African, access loans at exorbitant interest rates compared with the rates offered to developed countries, most of which are among the global powers that are scrambling for Africa's mineral resources. These elevated rates undermine Africa's ability to access the capital needed to engage in beneficiation. In order to address this problem, Africa must establish and strengthen its own financial architecture.

Chapter 5

JUST ENERGY TRANSITION PARTNERSHIPS IN AFRICA

The first Just Energy Transition Partnership (JETP) was announced in Glasgow, at the 26th UN Climate Change Conference in 2021. JETPs are aimed at supporting developing countries in their transition to renewable energy sources, in a manner that safeguards social justice. At the moment, six countries are taking part in JETPs, including South Africa, the first participating African country.

Among the key challenges associated with the implementation of JETPs is that funding is limited. For example, South Africa's energy transition requires ZAR 94 billion (approximately USD 525 million) over the next five years; to date, only ZAR 8.5 billion has been pledged under the JETP. It is unclear whether these pledges have been honoured in full.

Another challenge associated with JETPs is that the key players in these partnerships are predominantly the transnational companies that are using their capital to find ways to further exploit poor countries in the energy transition. Most of these companies are responsible for climate change through their environmentally destructive economic activities and have raked in massive profits from those activities. In negotiating JETPs, these companies are prioritizing their profits and not necessarily Africa's social justice interests. In addition, the participation of citizens in the negotiation and implementation of these partnerships is limited, undermining transparency and accountability.

To address these challenges, Africa must focus on cultivating JETPs on the continent. African stakeholders are driving ongoing efforts to design new JETPs, as announced at the EU–Africa Summit on climate action, decarbonization, and optimizing transitional energy sources and energy efficiencies, held in Nairobi 4–6 September 2023. These efforts must be reviewed and accelerated. The role of the BRICs countries in facilitating access to funding for African countries and establishing alternative JETPs should be studied.

Just Energy Transition Partnerships are aimed at supporting developing countries in their transition to renewable energy sources, in a manner that safeguards social justice.

Civil society could play a significant role in supporting governments in negotiating better JETPs and in enhancing transparency and accountability.

Civil society could play a significant role in supporting governments in negotiating better JETPs and in enhancing transparency and accountability in the negotiation and implementation of these partnerships. However, civil society is constrained from making such a contribution because of the shrinking civic space and the regressive attitudes of some governments towards civil society.

Chapter 6

RECOMMENDATIONS

The participants discussed the following key insights and broad recommendations during the round table, suggesting that they be further refined before any action is taken:

Reform of African governance architecture. There is a need for unified governance across the African Union as well as at the regional and national levels to enhance Africa's bargaining power in global markets. The Africa Mining Vision must be ratified to guide resource management and promote unified mineral governance across the continent.

Strong institutions and policy reform. African policies must be reformed to position Africa as a key player in the global geo-economy rather than just a supplier of raw materials. Institutions must be empowered to implement policies effectively, with a focus on policy domestication and harmonization.

Paradigm shift through leadership. Africa must pursue a paradigm shift and use its minerals to enhance broader socio-economic development. Negotiations of mining contracts should incorporate the need to address these socio-economic challenges.

Energy sustainability and economic development. The transition to green energy in Africa must be balanced with the use of fossil fuels to drive industrialization. Without fossil fuels, Africa cannot generate the energy needed for large-scale mining and industrial activities. Domestic capital investment must be mobilized to finance sustainable development.

Free movement of people, goods and services. Africa's progress is dependent on removing tariffs and other barriers to the movement of goods, services and people. Intra-African trade and free mobility are essential for the growth of domestic capital and industrialization.

Development of African economic architecture. A home-grown African finance mechanism is needed to reduce dependence on traditional international financing agencies, whose loans often come with exploitative conditions. Africa must develop resilient financial models that can withstand global economic shocks.

Scope of negotiations. Negotiations in Africa must address broader sustainability issues, such as education, technology transfer and infrastructure, to ensure holistic development.

Development of technical capacities. Africa must build and rely on Indigenous expertise for negotiating and managing trade agreements. Such expertise would reduce reliance on external arbitration, thus ensuring fairer deals in mineral resource contracts.

Proactive response to alternatives and recycling. Africa must prepare for the global shift towards recycling and alternatives to key minerals. Investing in research, innovation and youth training is crucial to maintaining Africa's position in the global market.

Development of a counter-strategy. Africa should develop a proactive strategy in response to global initiatives such as the G7's critical mineral supply plans.

Civic engagement and transparency. Governments must adopt transparent governance practices, involve civil society and raise awareness of the importance of green minerals and resource governance.

Development of geological data. Africa must invest in research in order to produce comprehensive, up-to-date geological data.

Accountability of the private sector. Transnational corporations must be required to reinvest in countries' sustainable value chains. Technical capacity must be built to ensure environmental sustainability and the inclusion of communities in socio-economic development.

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About International IDEA

The International Institute for Democracy and Electoral Assistance (International IDEA) is an intergovernmental organization with 35 Member States founded in 1995, with a mandate to support sustainable democracy worldwide.

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We develop policy-friendly research related to elections, parliaments, constitutions, digitalization, climate change, inclusion and political representation, all under the umbrella of the UN Sustainable Development Goals. We assess the performance of democracies around the world through our unique Global State of Democracy Indices and Democracy Tracker.

We provide capacity development and expert advice to democratic actors including governments, parliaments, election officials and civil society. We develop tools and publish databases, books and primers in several languages on topics ranging from voter turnout to gender quotas.

We bring states and non-state actors together for dialogues and lesson sharing. We stand up and speak out to promote and protect democracy worldwide.

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We have a catalogue with more than 1,000 publications and over 25 databases on our website. Most of our publications can be downloaded free of charge.

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International IDEA, together with Southern Africa Resource Watch, held a high-level technical round table on Africa's critical mineral resources in August 2024, to discuss these issues.