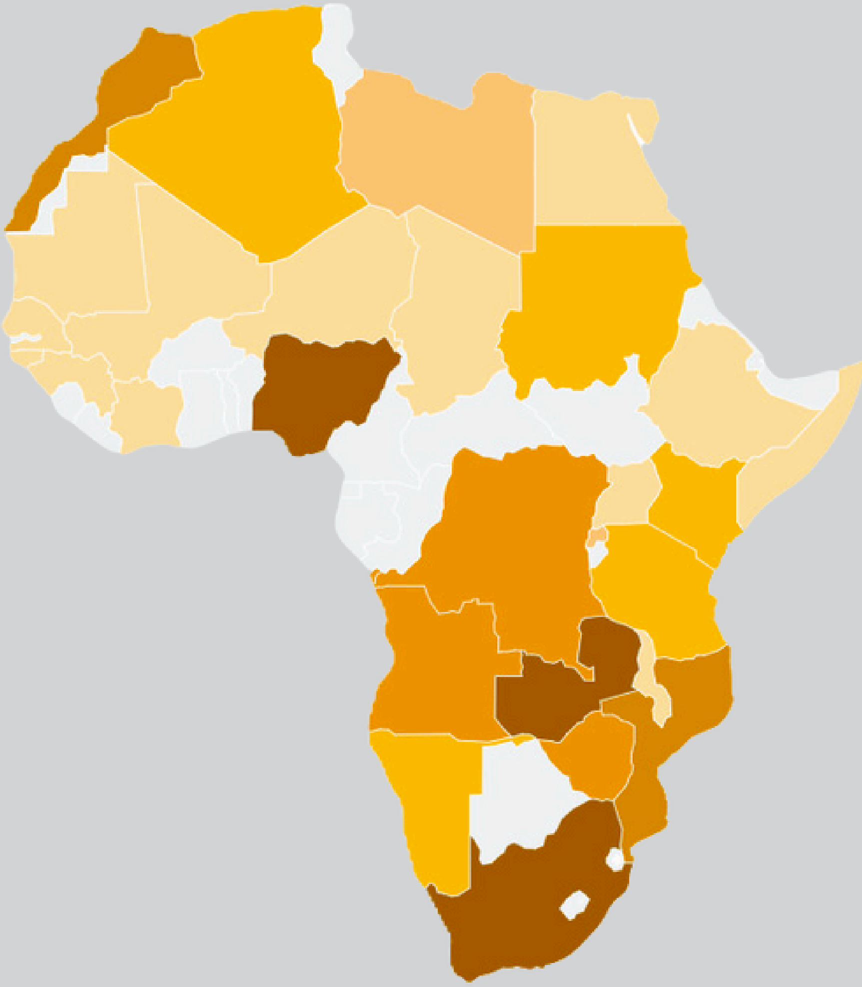
Executive Summary

MAPPING AFRICA'S GREEN MINERAL PARTNERSHIPS



APRI
AFRICA POLICY RESEARCH INSTITUTE

Executive summary

Mapping Africa's Green Mineral Partnerships

Mapping Africa's Green Mineral Partnerships delves into the evolving landscape of bi- and multilateral agreements between African states and global powers concerning access to "critical" or "green" minerals. The sector has been a global focal point not only because of the exponential rise in demand driven by the global green energy and digital transitions, but also because of security concerns arising from shifting geopolitical tensions, supply chain disruptions, and the concentration of refining capabilities in China. Against this backdrop, Africa's rich mineral endowment has drawn considerable attention. Various bilateral agreements – ranging from strategic partnerships to cooperation agreements – have been established with African states to secure mineral access, promote joint ventures, and integrate mineral value chains.

Despite their importance, these agreements are often opaque, with limited public accessibility to allow for comparative analyses. In order to obtain a more comprehensive view of Africa's green mineral partnerships, APRI conducted an extensive online search using multiple search engines and databases. The search was scoped to include G20 and BRICS+ member states, and states with a strong mining sector, such as Chile, Cuba and Venezuela. The collected data is depicted in an interactive online map, which includes nearly one hundred agreements, and offers insights into their content, initiation date, and public accessibility.

This report provides an in-depth analysis of **twelve** prominent global actors who have such partnerships with African states. These are: the United Kingdom, Turkey, Saudi Arabia, the United Arab Emirates, Russia, India, China, South Korea, Japan, Indonesia, the United States, the European Union. Each country and the EU section includes:

Key findings

- An overview of the national minerals strategy and geopolitical ambitions.
- Examination of relationships and agreements with African states.
- Discussion of additional measures beyond bilateral agreements.

Our investigation of these agreements has yielded several key insights into the evolving dynamics of resource diplomacy and the governance of critical mineral extraction. Firstly, the analysis underscores the prominent roles of global actors like China and Russia, in contrast with the relative scarcity of agreements involving traditional mining powers such as Australia and Canada.

Secondly, the nature of these agreements varies significantly, with some emphasizing direct state cooperation and the allocation of state funds, while others focus on fostering an enabling environment for private sector investment – a strategy that may lead to slower tangible results. Some agreements prioritize the inclusion of social and environmental standards, while others omit these considerations. The former approach, though potentially resulting in slower project execution, reflects the principled stance of the initiating countries. In this way, agreements frequently mirror broader geopolitical, historical, and power-related considerations, with countries selecting partners based on strategic factors such as trade terms, historical allegiances, and cross-sector cooperation.

The analysis also reveals the realpolitik of critical mineral extraction in Africa. Countries are increasingly viewing their critical mineral supply chains not just in terms of global competitiveness or even global responsibility to decarbonise, but as an issue affecting national security. The urgency with which critical minerals are pursued raises important questions about how it will affect Africa's agency in governing the extraction of these resources in the future.

Finally, the report underscores the need for greater transparency and accessibility in these agreements to better understand their implications and foster informed public discourse. Despite the strategic importance of these agreements, many remain vague and non-binding, necessitating further levers such as preferential financing to stimulate private investment. This transparency is crucial not only for economic clarity but also from public, democratic, and human rights perspectives, ensuring that these agreements align with broader societal interests.

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