ONE VOICE. ONE STRATEGY.

A CONTINENTAL BLUEPRINT FOR AFRICAN STRATEGIC MINERALS, JOINT INDUSTRIAL POLICIES AND DIPLOMACY

Africa's Green Minerals Workshops

Economic Commission of Africa

Addis Ababa, Ethiopia

2 November 2026

COMPARATIVE ECONOMIC TRADE-OFFS: THE THREE OPTIONS FOR AFRICA

STRATEGY	PRIMARY BENEFIT	MAJOR RISK / DOWNSIDE	REAL-WORLD FEASIBILITY
1. Export Raw Materials	Immediate foreign currency inflow; low barrier to entry.	"Resource Curse"; vulnerability to price shocks; jobless growth.	High (Current Status Quo)
2. Autarky & Import Substitution	Builds local industries; fosters regional self-reliance.	High inflation; lack of advanced tech; retaliation from global partners.	Medium-Low (Requires massive infrastructure)
3. Bloc Negotiation & Value Chain Integration	Maximum long-term wealth; high-skill jobs; global leverage.	Geopolitical pushback; requires unprecedented political unity.	Highly Recommended (The ideal path)

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THE WORLD NEEDS AFRICA'S MINERALS. DOES AFRICA HAVE THE POWER TO NEGOTIATE?

Western economies

Need secure cobalt, copper, manganese, platinum and lithium for batteries, defence and advanced industry, and want to diversify away from China.

China

Needs reliable supply for manufacturing and clean technology, and leads African processing, refining and manufacturing chains.

Africa remains a supplier of raw and semi-processed minerals, while those who control processing, technology, finance and markets capture the value. The DRC mines about 70% of the world's cobalt; China dominates its refining.

Africa's challenge is to convert its mineral endowment into economic power, industrial capacity and geopolitical influence.

FROM STRATEGIC NEGLECT TO A NEW GEOPOLITICAL OPPORTUNITY

Colonial–1960s	Mining built around exporting raw materials.
1970s–1980s	Price shocks, debt and structural adjustment weakened states and bargaining power.
1990s–2000s	Liberalisation; countries competed for investors instead of coordinating.
2010s	Production grew, but value addition happened outside the continent.
2020s onwards	The energy transition renews leverage over access, technology and processing.

Africa can now negotiate local processing, technology transfer, battery and EV manufacturing, infrastructure, skills and long-term procurement.

Without collective bargaining, Africa risks repeating the old extractive model under a green label.

THE AFRICA MINING VISION: AN AMBITIOUS CONTINENTAL RESPONSE

Adopted in February 2009, it moves Africa from extraction to mineral-based industrialisation, from enclaves to integrated economies, and from raw exports to local value addition.

Weak political commitment	Continental pledges not turned into national priorities.
Fragmented approaches	Countries negotiate alone and compete for investment.
Limited industrial capacity	Electricity, infrastructure, skills and finance constrain beneficiation.
Weak coordination	Mining, industry, trade and energy policies are disconnected.
External pressures	Global value chains still favour raw exports.

The Vision gave Africa a development vision. What is missing is a coordinated strategy to negotiate collectively.

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FROM ONE VOICE TO ONE STRATEGY: FROM POLITICAL CONSENSUS TO COLLECTIVE ACTION

Speaking with one voice is not new. What is new is a practical framework to act on it.

1 · Common priorities

What Africa wants from its strategic minerals.

2 · Common position

Conditions for engaging external powers and investors.

3 · Coordinated talks

Less competition, stronger bargaining power.

4 · Joint industrial priorities

The value chains and technologies to build.

5 · Collective demand

Regional markets and joint procurement.

6 · Strategic partnerships

Access traded for investment, technology and skills.

Africa should negotiate not just to attract mining investment, but to secure its place in the global industrial economy.

AGMS AND OVOS: COMPLEMENTARY FRAMEWORKS, DIFFERENT FUNCTIONS

	Green Minerals Strategy (AGMS)	One Voice, One Strategy (OVOS)
Question	How can green minerals drive industrialisation?	How can Africa negotiate collectively for greater benefits?
Orientation	Mineral development, governance, value addition.	Bargaining, resource diplomacy, partnerships.
Focus	Building African value chains and capacity.	Changing the terms of engagement with external powers.
Approach	Continental policy framework.	Common positions and coordinated diplomacy.
Outcome	Stronger participation in green value chains.	Stronger power to shape the terms of participation.

AGMS tells us what Africa wants to build. OVOS establishes how Africa negotiates collectively to make it possible.

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ONE VOICE ONE STRATEGY: A PAN AFRICAN NARRATIVE

1 · The Trap

Colonial extractivism and continued dependence on raw exports.

2 · Shallow Value Chains

Why beneficiation alone is not enough.

3 · Deep Value Chains

Processing, manufacturing, technology and industrial capability.

4 · Joint Industrial Policy

Coordinated priorities and complementary capacities.

5 · Joint Procurement

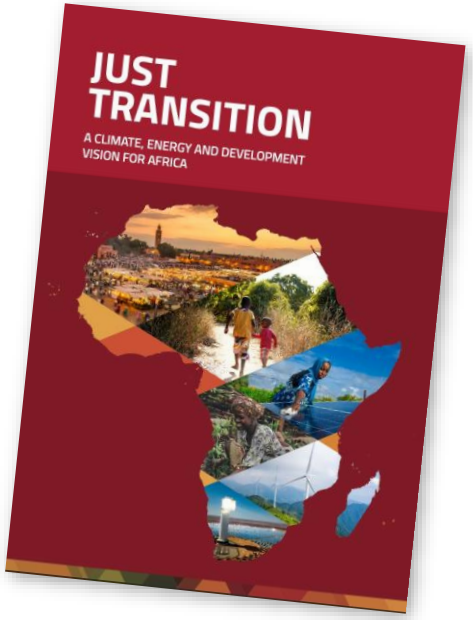
Collective demand creating markets and scale.

6 · Geopolitical Bargain of the Century

Negotiating strategically with global powers and investors.

OVOS connects mineral sovereignty, industrial policy, collective procurement and resource diplomacy into one negotiating framework.

THE THREE COLONIAL FUNCTIONS/TRAPS



Colonialism imposed on Africa three core economic functions that continue to persist to this day:

1. **Africa as the source of cheap raw materials for the Global North,**
1. **Africa as the consumer of Global North industrial output and technologies,**
1. **Africa as the place where the Global North dumps its obsolete technologies and assembly-line manufacturing that it no longer needs, but under the guise of "development, cooperation, job creation, partnership...."**

This is Intentional Economic Entrapment!

"Green industrialization" can reproduce all three functions unless Africa changes the rules.

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THE GEOPOLITICAL WINDOW OF OPPORTUNITY

This is not just a cycle of instability; this is a structural rupture in the global economic order.

The old system is broken: trade dependency, debt conditionality, and fragmented industrial capacity.

We see a convergence of crises:

- **Geopolitical fragmentation**
- **Supply chain reconfiguration**
- **Climate disruption**
- **Financial volatility**

For Africa, this is not just a risky moment to navigate and muddle through; this is a moment for strategic repositioning and structural transformation

Major economic blocs are building strategic industrial alliances.

Trade is no longer about efficiency, it's about security, resilience sovereignty, and control over strategic value chains.

For Africa, it is a moment to disrupt the globale economic system, using its competitive advantage

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AFRICA IS NOT POOR

Africa is indispensable.

Africa was never allowed to sit at the center of the global economy.

Why?

Because doing so disrupt the global economic & geopolitical hierarchy.

So get ready for some good disruption.

Africa has:

- **the largest reserve of critical minerals**
- **the youngest population**
- **enormous renewable energy potential**
- **fastest growing market**

This is Africa's century,

but only if we act together with *One Voice, One Strategy*.

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ONE VOICE. ONE STRATEGY.
THE ARCHITECTURE OF AFRICA'S STRUCTURAL TRANSFORMATION

Three strategic pivots in terms of how we think about development finance:

- **Pivot 1: From infrastructure finance to productive transformation**
- **Pivot 2: From project bankability to development viability**
- **Pivot 3: From crowding in capital to coordinating transformation**

Africa cannot borrow its way to development;

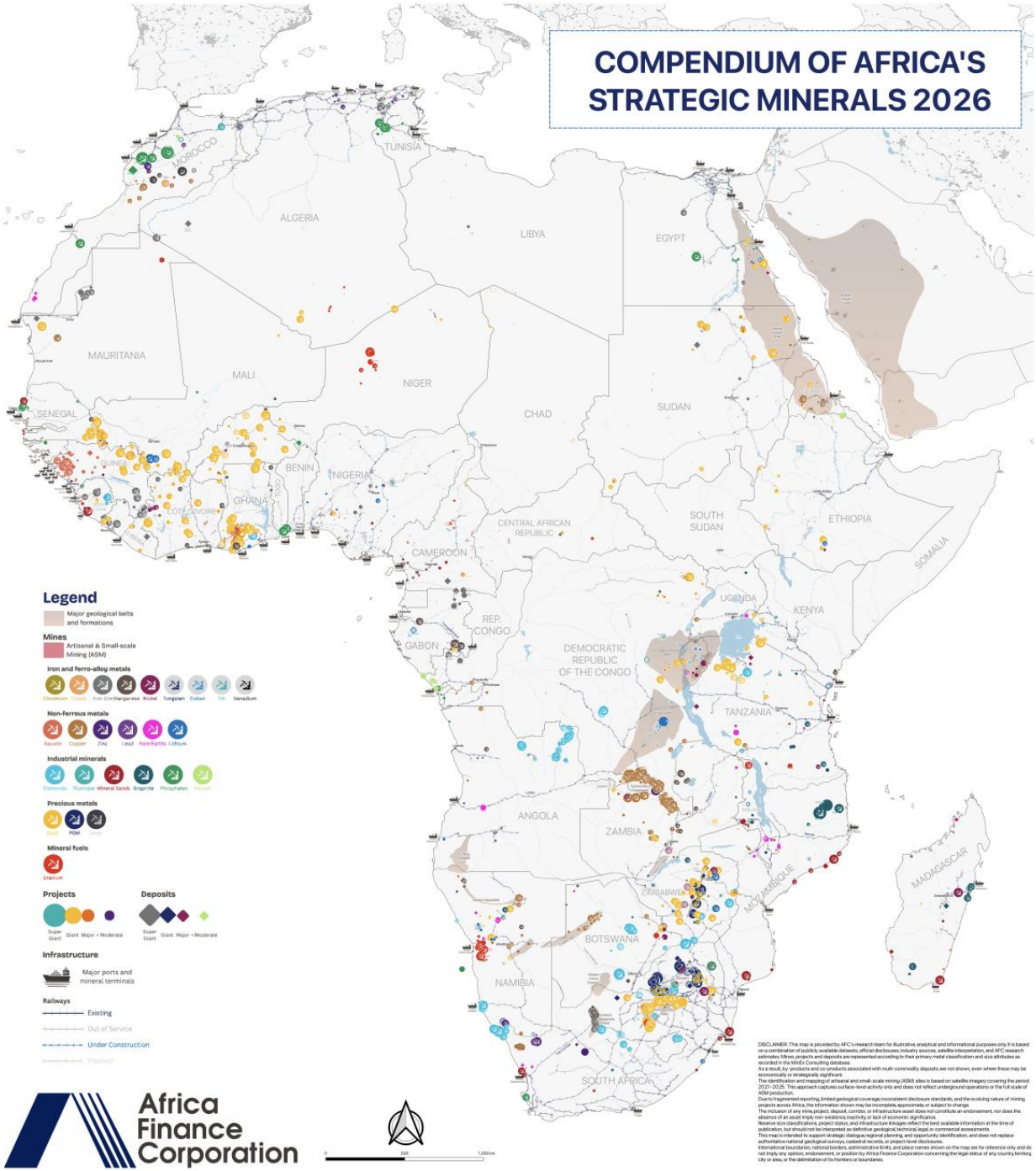
Africa cannot export its way to sovereignty; and

Africa cannot industrialize without coordination at scale.

But with the right institutional leadership; Africa can do all three.

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COMPENDIUM OF AFRICA'S STRATEGIC MINERALS 2026

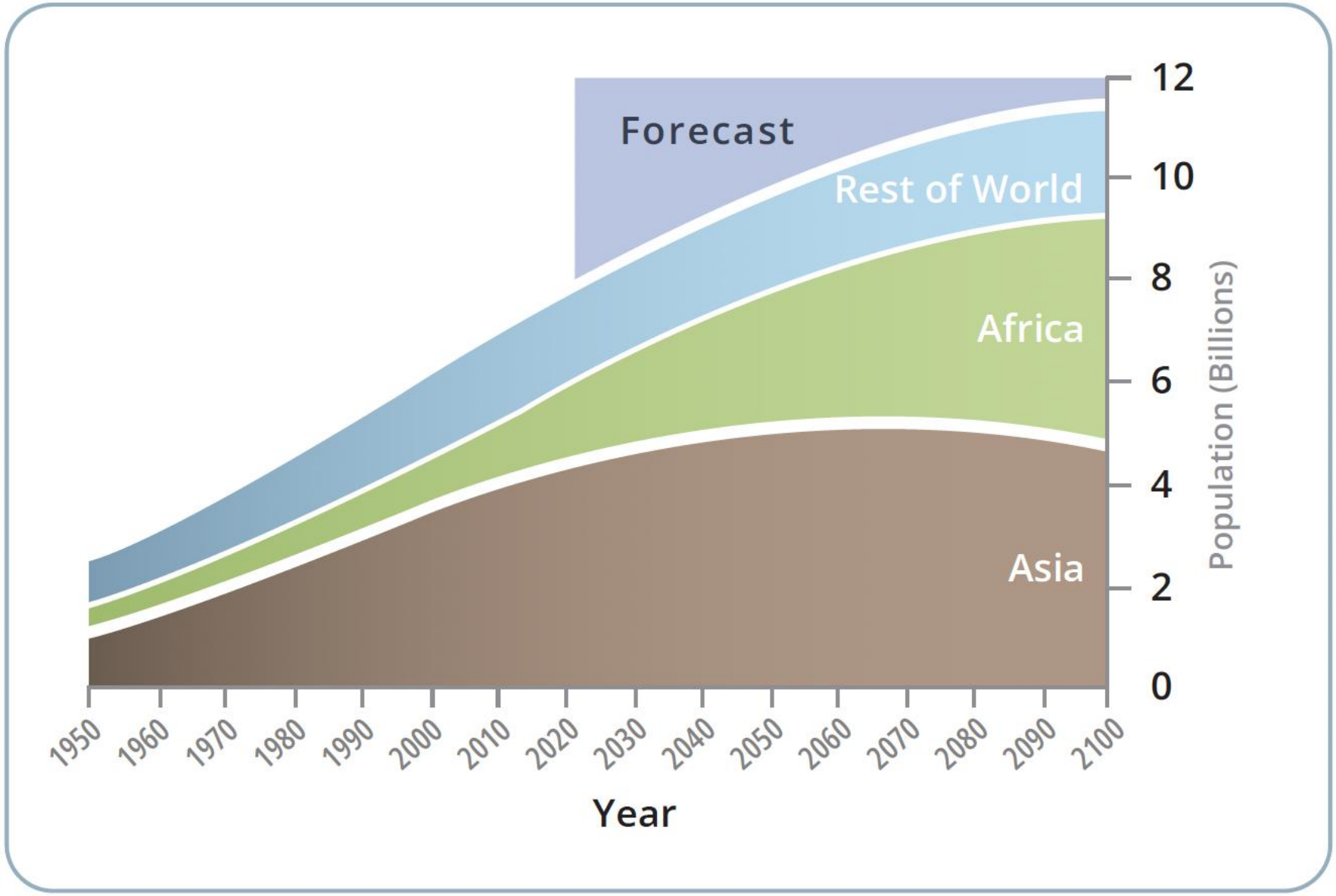


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DISCLAIMER: This map is provided by AFC's research team for illustrative, analytical and informational purposes only. It is based on a combination of publicly available datasets, official disclosures, industry sources, satellite interpretation, and AFC research estimates. Mines, projects and deposits are represented according to their primary metal classification and size attributes as recorded in the MinEx Consulting database.
As a result, by-products and co-products associated with multi-commodity deposits are not shown, even where these may be economically or strategically significant.
The identification and mapping of artisanal and small-scale mining (ASM) sites is based on satellite imagery covering the period 2021–2025. This approach captures surface-level activity only and does not reflect underground operations or the full scale of ASM production.
Due to fragmented reporting, limited geological coverage, inconsistent disclosure standards, and the evolving nature of mining projects across Africa, the information shown may be incomplete, approximate or subject to change.
The inclusion of any mine, project, deposit, corridor, or infrastructure asset does not constitute an endorsement, nor does the absence of an asset imply non-existence, inactivity or lack of economic significance.
Reserve size classifications, project status, and infrastructure linkages reflect the best available information at the time of publication, but should not be interpreted as definitive geological, technical, legal, or commercial assessments.
This map is intended to support strategic dialogue, regional planning, and opportunity identification, and does not replace authoritative national geological surveys, cadastral records, or project-level disclosures.
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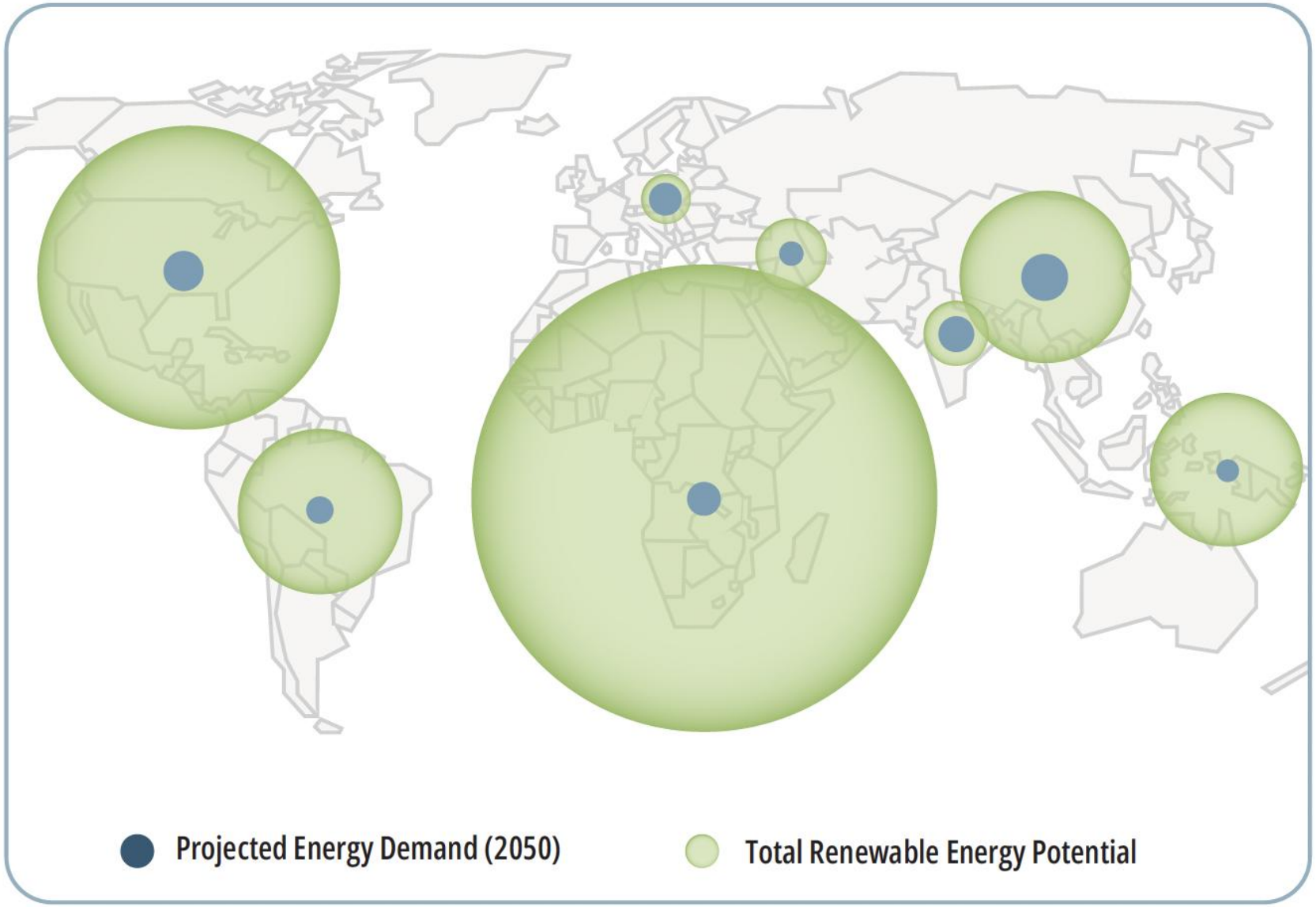
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Figure 4: Population growth in Africa and the rest of the world (1950-2100)



Source: EROS Center, 2016.

Figure 3: Africa's vast renewable energy potential



Source: Teske & Niclas (2021).

THE PROBLEM IS NOT THE LACK OF VISION

Lagos Plan of Action

Abuja Treaty

Africa Mining Vision

Agenda 2063

AfCFTA

Africa Green Minerals Strategy

Africa does not suffer from a shortage of ideas.

It suffers from a shortage of coordinated implementation strategies, diplomatic coherence and unity, and geopolitical leverage

One Voice. One Strategy.

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THE PROBLEM: SHALLOW VALUE CHAINS KEEP AFRICA TRAPPED AT THE BOTTOM

Export raw minerals

Limited processing

Low value addition

Assembly for foreign firms

Technology imported

Weak industrial linkages

Few skilled jobs

Little innovation

Dependence continues

Africa remains trapped at the bottom of the global value chains

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The Problem:
Deep Value Chains Build Economic Sovereignty

Critical Minerals

↓

Refining & Processing

↓

Intermediate Materials

↓

Components

↓

Finished Products

↓

Infrastructure Deployment

↓

Maintenance & Services

↓

Recycling & Circular Economy

↓

R&D • Engineering • African IP

Deep value chains create:

- **Technology transfer**
- **Engineering capabilities**
- **Skilled employment**
- **African firms**
- **Innovation**
- **Regional industrial ecosystems**
- **Economic sovereignty**

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NO AFRICAN COUNTRY CAN INDUSTRIALIZE ALONE.

Africa Can.

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WHY?

1.5+ billion people

↓

Huge market

↓

Economies of scale

↓

Integrated value chains

↓

Economic & Geopolitical leverage

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ONE VOICE. ONE STRATEGY IS THE PAN-AFRICAN WAY

Pan-Africanism is the economics of industrialization, because without economies of scale, no African country can industrialize.

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.

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.

JOINT PROCUREMENT: MARKET SIZE BECOMES INDUSTRIAL POWER

Today

- 54 countries negotiate separately
- Small markets, weak bargaining power
- Imported technologies with limited local value creation

One Voice, One Strategy

- **Pool African demand** for irrigation equipment, medical supplies, pharmaceuticals, software, hardware, etc...
- Negotiate **as one market**
- Require **technology transfer, local manufacturing, skills development, and regional value chains**

Joint procurement transforms Africa from a price taker into a market maker.

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THE GEOPOLITICAL BARGAIN OF THE CENTURY

Africa's bargaining chip has six assets:

- **strategic minerals**
- **renewable energy**
- **demographics**
- **markets**
- **geography**
- **geopolitical relevance**

Those six assets together create bargaining power (not the minerals alone).

THE BARGAIN (1): THE PREPARATORY WORK

Pre-negotiate among African countries and African stakeholders:

- **Priority sectors (energy, transportation, clean cooking, agriculture, etc..)**
- **Ownership structure**
- **Distribution of the value chains**
- **Distribution of the profit-wage shares**
- **Protection of labor rights, front-line communities, land rights, natural ecosystems, etc..**
- **R&D cooperation and commitments**
- **Establishment of joint sovereign wealth funds and development finance institutions**
- **Commitment to another approach to development that breaks from the mainstream approach that has failed Africa for decades.**

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THE BARGAIN (2): AFRICA'S TERMS

What Africa wants:

- **No loans. No debt traps. No charity. No aid.**
- **Real partnerships.**
- **In-kind contribution to joint ventures.**
- **Transfer of technology, know-how, research and development cooperation, technical and vocational training cooperation, etc...**

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THE BARGAIN (3): WHAT'S IN IT FOR AFRICA'S PARTNERS?

What the first-mover gets if they agree to partnership on African terms:

- **Privileged access to African markets**
- **Privileged access to African resources**
- **The opportunity to substantially increase their industrial, economic and geopolitical footprint globally**

Africa's offer is not exclusive to the first-mover

The bargain with the first-mover substantially increases Africa's bargaining position with all other major economic blocs.

The ideal of the Geopolitical Bargain of the Century is to reposition Africa at the center of a new international economic order of peace, justice, and sustainable prosperity.

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FRIENDS OF ALL SATELLITES OF NONE

The core of Pan-African foreign relations

This is not anti-China.

Not anti-Europe.

Not anti-America.

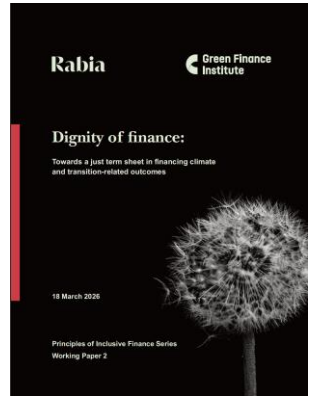
Not anti-anyone.

It is pro-Africa.

Africa wants partnerships; not dependency.

This is an important distinction that ought to inform Pan-African diplomacy.

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AFRICAN JUST TERM SHEET

Rewriting the Rules of Finance – Not Just Negotiating a Better Deal

From funder-driven terms to equal negotiation around African needs and priorities

Needs first: financing follows nationally determined development and transition priorities – no cherry-picking of only “bankable” projects.

Fair risk-sharing: risks go to those best able to bear them – rather than automatically being pushed onto African governments.

Affordable, appropriate finance: longer tenors, predictable/front-loaded flows, fair interest rates, appropriate instruments and local-currency options.

Protect sovereignty & dignity: no coercive conditionalities; financing must strengthen livelihoods, local value creation and public purpose.

Transparency & voice: communities and citizens participate; financing arrangements and risks are open to scrutiny.

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THE SECRETARIAT

Heads of State

Secretariat

Cabinet-level coordination at the national level

Technical working groups

Industrial implementation

This is an implementation architecture, not another bureaucracy.

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FIVE IMMEDIATE POLITICAL ACTIONS

Coalition of African Heads of State who have the courage to champion *One Voice. One Strategy.*

Launch Pan-African Secretariat

Continental Joint Industrial Strategy

African Just Term Sheet

Begin the Geopolitical Bargain

Why immediate action?

The window of opportunity is open for 3-5 years at best.

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THE MOST IMPORTANT POINT

None of this is relevant if Africa embarks on the mainstream, outdated, exploitative and environmentally destructive industrial and extractive models of the past.

Africa must break new grounds.

Africa must not reposition geopolitically in order to replicate mistakes.

***One Voice. One Strategy* is a call for a different kind of industrial model – one deeply embedded in social justice, environmental stewardship, sufficiency and genuine well-being for the common good. It must be a call for 'another development'.**

In every step of the proposed actions, there needs to be over-riding principles of social and environmental protection and guardrails, community and human rights, broad-based stakeholder participation and a genuine quest for transformative social change.

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FROM MINERAL SUPPLIER TO NEGOTIATING POWER

1 · Dependence	The West and China both need African minerals, but value goes to whoever controls processing, technology, finance and markets. The DRC mines about 70% of global cobalt.
2 · Lost leverage	Colonial export models, debt and liberalisation left Africa competing for investors. The energy transition reopens the chance to negotiate processing, technology and manufacturing.
3 · Mining Vision (2009)	Africa already aimed to move from extraction to industrialisation, but implementation stalled: weak commitment, fragmented approaches, thin industrial capacity.
4 · One Voice, One Strategy	Not a new call but a new approach: common priorities, a common negotiating position, coordinated talks, joint industrial priorities and collective demand.
5 · AGMS and OVOS	The Green Minerals Strategy sets what Africa wants to build. OVOS is how Africa negotiates collectively to make it possible. Complementary, not competing.
6 · The Blueprint	The Trap · Shallow Value Chains · Deep Value Chains · Joint Industrial Policy · Joint Procurement · The Geopolitical Bargain of the Century.

Africa must move from negotiating access to its minerals to negotiating its participation in the global industrial economy.

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The question is no longer whether Africa has what the world needs

The question is whether Africa will negotiate as a bloc

ONE VOICE.
ONE STRATEGY.
THE TIME IS NOW.