

Regionalizing African Mineral Value Chains: Requirements for Success

SILAS OLAN'G, THOMAS SCURFIELD, ANTHONY BLACK AND MICHAEL SMITH

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Natural Resource Governance Institute

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Key messages

- **Regional cooperation can enhance the prospects for mineral value addition in Africa, but it requires governments, regional bodies and private sector actors to overcome a combination of political, economic and technical challenges at national and regional levels.**
- **Other regional initiatives within Africa and the rest of the world suggest six ways to improve the chances of establishing regional mineral value chains:**
  1. **Start small and targeted:** Build coalitions of willing governments around specific value chain opportunities, and allow technical capacity and trust to grow.
  2. **Engage the private sector:** Transparently engage local and foreign private sector actors to identify and understand the market failures preventing value chain development and the opportunities available to advance it.
  3. **Share the benefits:** Explore mechanisms that ensure all participating countries benefit– including through Africa's more-developed countries showing leadership by supporting investments elsewhere in the region.
  4. **Strengthen regional institutions:** Expand the mandate, capacity and resources of regional institutions, particularly their research and planning functions, to improve design and advocacy of regional cooperation.
  5. **Ensure African ownership:** External partners should play an enabling–not driving–role, supporting regional institutions and initiatives while ensuring African leadership.
  6. **Foster public support:** Use transparency, multistakeholder consultation and public outreach to build citizen buy-in and lasting political commitment.

Summary

African governments have long sought to add more value to their mineral resources in order to increase revenues, create jobs and drive broader economic development. With rising global demand for minerals, these ambitions have grown. However, access to mineral deposits alone is not enough to make value addition feasible. Individual countries often face major obstacles, such as insufficient production volumes, infrastructure bottlenecks, limited industrial capacity and constrained domestic demand for end products.

Regional cooperation offers a promising solution. By working together, countries could pool mineral supplies in shared processing facilities, build cross-border infrastructure, specialize in different stages of a value chain and expand downstream markets. In doing so, governments would make mineral-based industries across Africa more viable and competitive.

Africa's current level of cooperation shows mixed prospects for developing regional mineral value chains. Although broader African integration is increasing, it remains limited. Intra-African trade is still low, and there has been limited implementation of the industrialization strategies of the continent's Regional Economic Communities (RECs). Cooperation on the minerals sector has also been challenging. Implementation of the African Union's (AU) African Mining Vision (AMV) and REC initiatives—such as the Southern African Development Community (SADC) Regional Mining Vision and the Economic Community of West African States (ECOWAS) Model Mining and Minerals Development Act—has been inconsistent. Projects such as collaboration between the Democratic Republic of Congo (DRC) and Zambia on battery precursor production show potential but are experiencing coordination challenges.

The launch of the African Continental Free Trade Area (AfCFTA) and recent adoption of the African Green Minerals Strategy (AGMS) have raised hopes that meaningful cooperation can now be achieved. However, as highlighted by countries' limited cooperation to date, establishing regional mineral value chains will require overcoming a myriad of political, economic and technical obstacles at both national and regional levels.

Regional cooperation adds significant complexity to the already difficult task that African countries face in leveraging minerals for sustainable development and implementing industrial policy. Political instability and fragmented interests undermine trust, disrupt trade and divert attention from regional development initiatives. Limited infrastructure financing, constrained government capacity and weak coordination mechanisms further constrain cooperation. Political economy dynamics are central: regional value chains can produce uneven benefits both within and between countries. Yet, governments often face domestic pressure to retain control over resources and deliver jobs locally, even if domestic projects are either unviable or would not generate as many benefits as regional projects. Growing geopolitical competition for minerals compounds these challenges. Supply decisions are becoming more closely tied to foreign state interests, and there is increased risk that bilateral mineral deals will sideline regional cooperation.

Much can be learned from existing regional initiatives—both within and beyond Africa, and in minerals and other sectors—on how to overcome these challenges. Based on these experiences, we have identified six ways that regional and national policymakers can improve the chances of establishing regional mineral value chains.

Start small and targeted. Broader, top-down regional integration efforts—such as REC industrialization strategies and the AfCFTA—can help enable regional mineral value chains. However, progress is more likely if this is combined with a bottom-up approach that builds coalitions of willing governments around specific opportunities. Starting small increases the chances of aligning national interests, while targeting particular value chains—and specific segments within them—allows policymakers to focus limited political capital, time and resources where it will be most impactful. As trust and technical capacity grow, and proof of concept is established, cooperation can expand and deepen over time.

Transparently engage the private sector. Regional mineral value chains depend on commercial decisions, making private sector engagement essential to identify viable opportunities, determine the market failures preventing their realization and align policies with market realities. While such engagement has often been lacking, initiatives like AfCFTA's working groups offer a promising model. However, strong integrity safeguards—such as transparency, civil society participation and independent oversight—are critical to avoid corruption and ensure accountable policymaking.

Share the benefits between countries. Using overly prescriptive approaches to distributing value chain activities risks undermining commercial viability and reducing overall gains. Yet, ensuring benefits are shared among participating countries is essential to addressing both the perception and reality that some countries gain more than others. The AGMS has proposed several mechanisms to support this, including a value chain investment fund that could channel investment to less-developed countries and—if well designed—incentivize cooperation on regional processing facilities. A complementary approach would be for more-developed countries, such as South Africa, to take a leadership role by actively promoting activities and creating buy-in in less-developed countries.

Strengthen the capacity of regional institutions. Challenging political economy dynamics have resulted in most governments prioritizing projects they see as explicitly serving national interests. This makes the role of regional institutions critical in both advocating for the benefits of regional value chains and in designing and supporting implementation of effective strategies and projects. To play this role effectively, these institutions need stronger mandates, greater technical capacity and significantly expanded budgets. Dynamic research and planning functions are especially vital to drive informed and opportunistic policymaking.

Harnessing external support that ensures African ownership. Africa's institutions and initiatives need external support to advance regional mineral value chains. However, strong African leadership is essential to ensuring alignment with continental priorities and sustained engagement with the myriad of regional and national actors. External partners should prioritize building institutional capacity and supporting African-led initiatives like the AGMS while ensuring their country-level engagements do not undermine regional opportunities. African policymakers could improve their chances of securing such support by explicitly linking it to partners' interests—for instance, by offering them access to the outputs of the regional projects they support.

Foster public support. Public support is crucial for enduring regional cooperation, strengthening both short-term political backing and long-term government commitment, even through evolving political conditions. To build trust and secure buy-in, policymakers should be transparent about project details and actively engage diverse stakeholders, including affected communities, local businesses, organized labor and civil society. Broad public outreach can help communicate the benefits and strengthen overall support.

Introduction

African governments and civil society actors have long prioritized increasing domestic value addition of their minerals to boost export revenues and reduce their volatility, create jobs and stimulate the development of other sectors. The current surge in global demand for minerals—driven by the energy transition as well as digitalization and defense industries—is increasing this ambition to undertake more processing and manufacturing of semi-finished and finished products, such as batteries or copper wires and rods.

Yet, many African countries face considerable obstacles to advancing along mineral value chains: access to mineral deposits alone is not enough. A country's competitiveness in processing or manufacturing depends on a wide range of factors, including the mineral itself, the stage of the value chain targeted and the characteristics of its mineral sector, wider economy, infrastructure and policy framework.[1]

In this context, regional cooperation presents a potentially transformative opportunity. By working together, countries could overcome some of the barriers that have stymied national efforts by, for example, pooling mineral supplies, building cross-border infrastructure and expanding markets to support more viable and competitive mineral-based industries.[2]

Regional cooperation is challenging to implement, however. Efforts to foster regional cooperation around Africa's minerals are not new. Governments, regional institutions and the private sector must navigate a complex mix of political, economic and technical obstacles to support the establishment of regional mineral value chains. Improving the prospects for regional cooperation requires a better understanding of the factors that influence success or failure. Much can be learned from past and ongoing regional initiatives.

This report explores how regional cooperation can help African countries achieve their mineral value addition goals and sets out the current state of regional cooperation across the continent. Drawing on existing literature and expert interviews, we then identify overarching lessons from existing regional initiatives—within and beyond Africa, and in minerals as well as other sectors—to guide policymakers. The African Development Bank (AfDB) is assessing specific value chain prospects across the continent, while other organizations, such as Climate Compatible Growth, are mapping the locations of deposits, existing infrastructure and cooperation opportunities.[3] The next step for policymakers, external partners and research institutes will be to adapt these lessons to those opportunities.

How regional cooperation could support value addition ambitions

Efforts by individual African countries to move along the value chain have often been hampered by structural constraints. Many countries produce too little of a mineral for value addition facilities to achieve economies of scale. For example, Tanzania's attempts to establish a copper smelter in the 2010s were partly thwarted by insufficient domestic feedstock.[4] Pooling mineral supplies across borders could enable larger, lower-cost facilities, potentially increasing their competitiveness. This was one of the rationales behind a 2023 agreement between the DRC and Zambia to collaborate on battery precursor production, which envisaged the construction of a precursor plant in a cross-border special economic zone.[5]

In addition to improving project economics, regional pooling could enhance countries' bargaining power to secure financing and technology transfer, supporting their value chain ambitions. This collective leverage is especially valuable in an increasingly transactional geopolitical landscape, where minerals often play a central role—as illustrated by recent agreements between the U.S. and Ukraine, as well as the U.S. and the DRC and Rwanda.[6]

Regional cooperation could help overcome the energy constraints that, for example, make it more challenging for Ghana to develop an aluminum value chain.[7] Countries could coordinate investments in shared power generation and transmission infrastructure, and better leverage regional electricity markets—such as the continent's five power pools—to support energy-intensive processing. Greater use of existing cross-border gas pipelines, such as the West African Gas Pipeline that delivers Nigerian gas to Ghana, could also play a role, particularly for processes that require significant energy in the form of heat.

Transport infrastructure and other logistical bottlenecks could also be improved with cooperation. For example, the planned upgrading and expansion of the Lobito Corridor, linking Angola, the DRC and Zambia by rail, could reduce transport costs for mineral products and support value addition if it is designed to support processing hubs rather than simply to export raw materials.[8] Fewer barriers to intra-African trade would also make it easier, for example, for the DRC and Zambia's planned battery precursor project to source minerals and other inputs from other countries in the region.

Regional cooperation would increase the prospect of establishing entire value chains on the continent. Intra-African trade and coordinated industrial policies across governments would make it easier for countries to specialize in different stages of a value chain. For example, one country might focus on mineral processing while another develops component manufacturing. Market integration could expand the potential customer base for producers of semi-manufactured and manufactured products, as well as instilling discipline through competition. Many African countries lack sufficient demand to incentivize local manufacturing—and, where manufacturing does exist, to achieve the economies of scale needed to make exports competitive in overseas markets. While Africa's largest economies—Egypt and South Africa—are only ranked 38th and 40th globally, the combined GDP of all 54 African countries is roughly equivalent to that of France, the world's seventh largest economy.[9]

The potential benefits of regional cooperation also go beyond immediate economic efficiencies. Regional cooperation could support the establishment of more African-owned mining companies, which may be more likely to lead to value chain development in the long term due to, among other things, better knowledge of the local economy and less vertical integration with global value chains.[10] Countries could agree on a common approach to encouraging local participation in mining licenses, then pool resources to reduce the cost of capital for such companies. Similarly, countries could pool resources and expertise to develop advanced manufacturing capabilities further along value chains, sharing technology and best practices.

The current state of regional cooperation in Africa

Africa's current level of cooperation presents grounds for caution as well as optimism about the prospects for developing regional mineral value chains.

Broader African integration

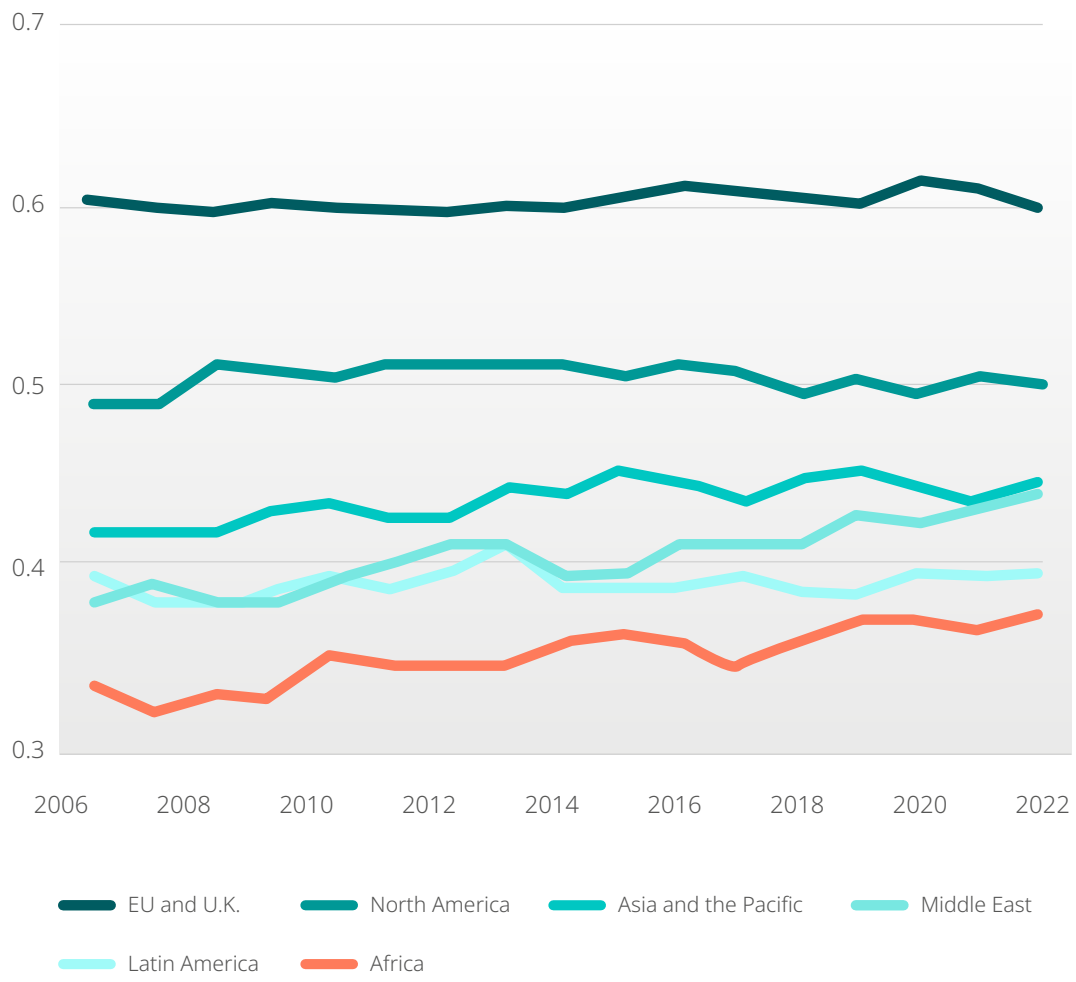
Across the continent, integration remains relatively limited by several measures, including intra-regional trade, development of regional value chains and infrastructure connectivity. For example, in 2022, intra-African trade was only 16 percent of total trade by African countries (though this is likely an underestimate given the large volume of informal trade that is not recorded).[11] In contrast, 68 percent of European trade and 59 percent of Asian trade was intra-regional.[12]

Limited intra-African trade poses a particular challenge to the continent's industrialization efforts. It tends to involve a higher share of intermediate and manufactured goods compared to trade with the rest of the world, making it especially important for the growth of domestic manufacturing.[13] Direct cooperation in industrialization is also limited. The AU (through the Accelerate Industrial Development for Africa strategy in 2008) and most RECs[14] have developed industrialization strategies, but have generally struggled to implement them.[15] The 2025 assessment of regional integration by the AU, AfDB and United Nations Economic Commission for Africa (ECA) scores the productive integration of the average African country—a measure of how well its production complements that of other African countries, and therefore, its likelihood of involvement in regional value chains—at just 0.175 out of 1 for 2020–2022.[16]

Yet, promisingly, African integration is advancing in some areas. According to the Regional Integration Index, shown in Figure 1 (on the next page), Africa has seen faster progress than any other region except the Middle East over the past decade. Intra-regional trade is growing within certain RECs, albeit slowly.[17] For example, trade within SADC rose from an average of 16 percent of total trade in 2001–2007 to 23 percent in 2022. While the productive integration of the average African country remains low, at 0.175 in 2020–2022, it has increased slightly from 0.158 in 2017–2019.[18] Although not without challenges, Africa's five regional power pools, which coordinate electricity generation and transmission, have contributed to improving energy access.[19] The number of interconnectors are increasing (for instance, the recently announced connection between Tanzania and Zambia), and planning for an African Single Electricity Market is underway.[20] In addition, 39 African countries have eased travel restrictions for other Africans since 2016.[21]

This growing integration has laid the groundwork for AfCFTA, launched in 2021, which seeks to reduce tariff and non-tariff barriers.[22] ECA estimates full implementation of AfCFTA could boost intra-African trade by 45 percent by 2045.[23] However, obstacles to its implementation remain, such as slow progress of negotiating rules of origin for key sectors.[24] The reluctance of some countries to join their REC free trade areas also highlights the challenges of turning the AfCFTA vision into reality—for example, Comoros and the DRC are still yet to join the SADC free trade area, which has been in place since 2008.

Figure 1. Regional Integration Index in 2006–2022[25]



Current regional cooperation on Africa's minerals

Efforts to foster regional cooperation on Africa's minerals are not new. As far back as 1980, the Lagos Plan of Action—the founding document of the Organisation of African Unity—emphasized the importance of "collective self-reliance" to leverage Africa's resources for development.[26]

In 2009, this goal was restated in the AMV. The AMV, introduced following decades of disappointing benefits from the mining sector for the continent, called for integrating Africa's mining sector into broader development strategies, including through regional cooperation.[27]

The AU reinforced this agenda with the launch of the AGMS earlier this year.[28] Building on the AMV, the AGMS is organized around four pillars:

→ **Box 1**

The four pillars of the African Green Minerals Strategy

1. **Advancing mineral development** by increasing geological knowledge, conducting feasibility studies to attract investment, building infrastructure for an enabling environment, establishing a mineral value chain investment fund and aligning mineral resource management with the aspirations of the AMV.
2. **Developing people and technological capability** by identifying the skills and technologies needed to capitalize on green minerals opportunities, and building the institutions to develop these as well as the required research, development and innovation.
3. **Developing mineral value chains** to achieve equitable resource-based industrialization through supply chain development, beneficiation and value addition, as well as to access wider regional and continental markets through the AfCFTA.
4. **Mineral stewardship** to responsibly guide the environmental, social and governance aspects of green minerals exploitation and use, together with material reuse and recycling.

Several RECs have also developed strategies, laws and model laws for government cooperation of their mining sectors. For example, SADC developed a Protocol on Mining in 1997 and proposed a Regional Mining Vision in 2017 that set out, among other things, mechanisms for establishing regional value chains.[29] The West African Economic and Monetary Union (WAEMU) have had a Community Mining Code in place since 2003, and member states ratified revisions to it in 2023.[30] This code harmonizes aspects of the legal frameworks within the REC to encourage investment while reducing race-to-the-bottom risks—for example, by limiting the scope and length of stabilization clauses.

Likewise, ECOWAS adopted a Model Mining and Minerals Development Act in 2019. The act, among other things, encourages member states to recognize local content from one another to enable local suppliers of goods and services to benefit from economies of scale, and, when domestic value addition of a mineral is unfeasible, to first assess value addition prospects in other member states, then the wider continent, before exporting it overseas.[31] The industrialization strategies of the Common Market for Eastern and Southern Africa (COMESA), EAC and SADC also include plans to promote regional minerals-based industrialization.[32]

However, as with REC industrialization strategies, meaningful regional cooperation on minerals is yet to materialize in most cases. The revised WAEMU mining code is now in force, and countries such as Burkina Faso and Mali have introduced new national laws that largely align with it. However, SADC member states are yet to finalize the new SADC Mining and Minerals Development Protocol, which incorporates the Regional Mining Vision. ECOWAS governments have thus far failed to incorporate key value addition and local content provisions in the Model Mining Act into national legislation. While there are encouraging discussions about linking the DRC and Zambia battery precursor project to other regional value chain activities, such as those in Morocco, the project itself is advancing slowly.[33]

The DRC and Zambia are now planning to host facilities in separate special economic zones, which could potentially reduce the benefits of collaboration.[34] Several other plans for shared value addition facilities in the last two decades have failed to advance. These include a coltan refinery in South Africa that would have processed minerals from elsewhere in SADC and EAC, and alumina refining between Ghana and Guinea.[35] Earlier this year, construction began on a railway line to transport unprocessed nickel from Burundi directly to the port city of Dar es Salaam, Tanzania, for overseas export. This development suggested an end to discussions between Tanzania, Burundi and investors about supplying Burundian nickel to the planned Kahama multi-metals refinery in Tanzania.[36]



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Challenges for regional cooperation on mineral value chains

While regional cooperation offers significant potential, progress has been limited. Regional cooperation adds layers of complexity to existing challenges that many countries face in both leveraging minerals for sustainable development and implementing industrial policy.

Political instability and conflicts hinder implementation of regional initiatives by undermining previous areas of consensus; eroding trust and disrupting trade and projects between countries; diverting the attention and resources of regional institutions; and reducing investor confidence that can impact plans in other countries within the region. For example, political unrest in Mozambique in 2024 led to South Africa closing its border, blocking a key route for its chromium exports.[37] In West Africa, the departure of Burkina Faso, Mali and Niger from ECOWAS following coups in those countries may further weaken cooperation efforts.

Another structural constraint is the limited financing available to improve infrastructure both within and between countries. The AU estimates that the continent needs USD 130–170 billion annually to meet its infrastructure requirements. However, only half of this is currently being met. This is due to a combination of factors, including the constrained public finances of African countries; insufficient development funds; and private investor challenges in accessing infrastructure financing.[38]

The larger number of components and actors involved in regional value chains will add strain to governments' already limited capacity to plan, develop, and implement the necessary policy frameworks and industrial projects. For example, supporting companies to solve the chicken-and-egg problem—being unable to advance value addition projects without clearly defined sources of feedstock, yet unable to secure those commitments without more advanced project plans—is even more difficult when the value chain crosses borders. Coordination is a particular challenge. Coordination within many governments is already limited, and engaging with other governments will place further pressure on these mechanisms. For instance, while the DRC and Zambia have each established an intra-governmental battery council for the planned precursor project, they have yet to set up a mechanism to coordinate between the two councils.[39]

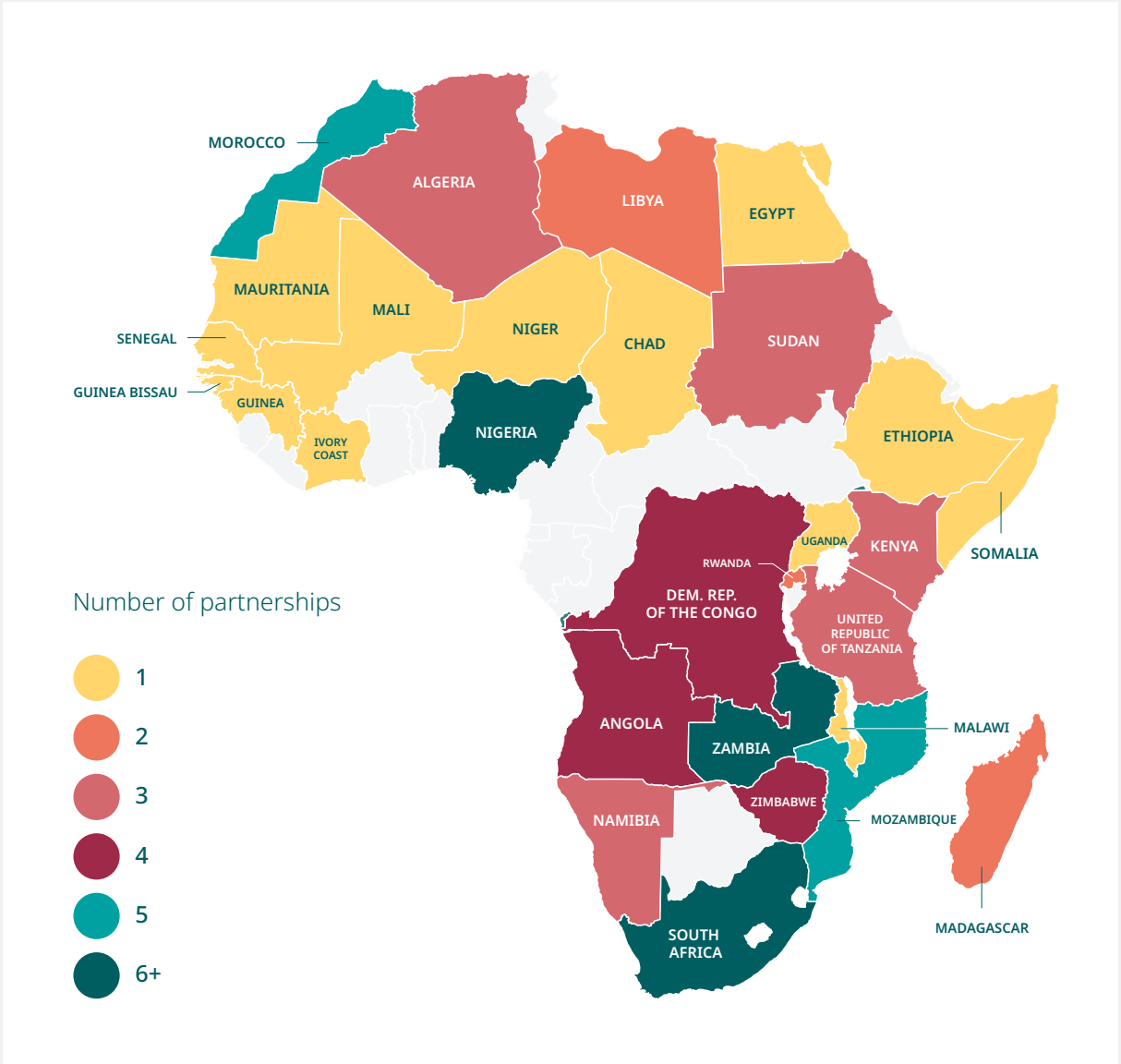
Regional cooperation can exacerbate political economy issues. Value chain development can create winners and losers within a country. For example, in the DRC, competing priorities of—and the difficulty to reconcile—short-term revenue generation with long-term value chain upgrading may mean that the former is prioritized,[40] while political elites that are closely connected to the mineral road transport business may oppose the development of alternative transport routes such as the Lobito Corridor.[41]

The development of regional value chains could also create winners and losers between countries, or at least a discrepancy between those who benefit more and those who benefit less from regional cooperation. Regional disparities in the capacity of countries to participate increases the likelihood of uneven outcomes. Existing South African industrial capabilities, for example, mean that the country already has a large trade surplus in manufactured goods with other SADC members, and South African retailers have a large footprint in the region. The country could also dominate processing and manufacturing activity in new regional value chains in southern Africa—particularly in light of the economic benefits that arise from agglomeration (i.e., the clustering of activities nearby to each other).[42]

Even so, political leaders across the continent face pressure to create processing or manufacturing jobs at home—even if such projects are either economically unviable or would not generate as many benefits. For example, elements of Ghanaian civil society have described construction of a lithium refinery in the country as a "red line" that the government must meet.[43] Government approaches to regional cooperation are therefore shaped by the interests of a range of domestic actors—from political and business elites to the broader public—who may view regional initiatives as either an opportunity or a threat.

Increased geopolitical competition for minerals adds further complexity to regional cooperation. Supply decisions are becoming more closely tied to foreign state interests. For example, the U.S. is currently providing financial support for graphite mining in Mozambique and nickel refining in Tanzania in exchange for future exports, while the European Union (EU) has designated a planned cobalt refinery in Zambia as a strategic project.[44]

Figure 2. Mineral cooperation agreements between African and non-African countries[45]



Since 2020, African countries have signed broader mineral cooperation agreements with at least 14 non-African states, and a "minerals-for-security" agreement between the U.S., DRC and Rwanda is expected imminently.[46] While such agreements can help African governments leverage global demand to capture greater benefits or pursue broader national goals, they also raise the risk that regional cooperation will be sidelined in favor of bilateral deals.

Geopolitics can also influence both the financing and destination markets for value-added products. For instance, the U.S. Inflation Reduction Act restricts incentives for electric vehicles containing components from so-called "foreign entities of concern."[47] Although the Trump administration has curtailed these incentives, it illustrates how geopolitical tensions can complicate the development of multi-country value chains involving diverse investors.

Regional cooperation must therefore navigate an array of economic and political dynamics, as well as grappling with the inherent tension between cooperation and competition for participating countries.

In the remainder of this report, we explore lessons from regional initiatives in Africa and beyond that can help increase the chances of success. These lessons focus on:

- Starting small and targeted
- Transparently engaging the private sector
- Sharing the benefits between countries
- Strengthening the capacity of regional institutions
- Harnessing external support that ensures African ownership
- Fostering public support



Photo by Ivan Tykhyi via iStock

Starting small and targeted

Limited implementation of regional initiatives that target the development of regional value chains—from the REC industrialization strategies to the SADC Regional Mining Vision and ECOWAS Model Mining Act—highlight, among other things, the challenges associated with broad "top-down" strategies and frameworks. The wide geographic coverage of these initiatives makes it even more difficult to align the diverse and often competing interests of member states while still producing a useful strategy or framework, even when those states have endorsed and, in some cases, contributed to designing the strategies and frameworks themselves. For example, REC industrialization strategies have tended to largely aggregate or duplicate national industrialization strategies rather than orienting them around complementary regional objectives.[48]

Regional cooperation on mineral value chains is more likely to succeed when it fully accounts for national political realities, economic structures and uneven capabilities and development levels across countries. Starting small with coalitions of willing governments can increase the likelihood that cooperation frameworks will account for such complexities, thereby improving the chances of reaching an agreement and achieving implementation.[49] With experience elsewhere indicating that collaboration is subject to a learning curve, cooperation can then deepen over time as technical capacity and trust develops.

Governments and regional institutions are also more likely to catalyze regional mineral value chains by targeting specific chains, and specific parts of them. While regional cooperation can improve the feasibility of value addition in some cases, it will not make all forms of value addition economically viable or beneficial. For example, economies of scale are only one of several barriers to Ghana's lithium refining ambitions. Even if Ghana coordinated with other West African lithium producers—such as Mali and Nigeria—to pool feedstock for a larger refinery than is currently feasible with only domestic production, a Ghanaian refinery would likely still face considerably higher costs than Chinese facilities.[50] A targeted approach allows governments and regional institutions to focus limited political capital, time and resources on the opportunities with the greatest possible impact.

Therefore, while broader, top-down regional integration efforts, such as REC industrialization strategies and AfCFTA, have the potential to be important enablers for regional mineral value chains, focus should also be on a "bottom-up" approach based on building coalitions around specific opportunities.

An example of this bottom-up approach is the establishment of Airbus. The European airline started as a carefully calibrated collaboration between the French, German and U.K. governments and their aerospace company partners to enable them to compete against the U.S.'s dominance of the sector through Boeing. The consortium negotiated a division of labor and responsibility that was split between countries differently for different components, based on national priorities and capabilities.[51] Although there has been criticism of this carefully configured mode of organization being cumbersome, it became more flexible, expansive and effective over time.[52] Airbus is now the world's leading commercial aircraft manufacturer and has operations across a range of countries.

Encouragingly, the AGMS considers the likely need for a subset of countries to initially cooperate—both to increase the feasibility of this cooperation and to provide proof of concept to encourage other countries and companies to follow. The DRC and Zambia's planned battery precursor project has this potential. However, its challenges indicate that starting small and targeted is only part of the solution.

Transparently engaging the private sector

Governments and regional institutions should proactively engage the private sector to identify both the value chain opportunities to target as well as the best approach to pursuing these. Implementation of industrial policy globally has highlighted the importance of private sector engagement for helping governments identify and understand key challenges, including the market failures that are preventing value chain development; the opportunities that are available to advance it; and possible interests that may oppose such plans.[53]

Most regional value chains that have been established in Africa and elsewhere have been driven by commercial decisions made by the private sector, with companies engaging governments to help facilitate them. For example, Dangote Group is a large diversified Nigerian multinational. Its cement division operates across Africa, positioning its operations across different countries to optimize production and distribution. In West Africa, it sources limestone from Senegal, has a grinding facility in Cameroon, manufactures the cement in Nigeria and operates bagging terminals in Ghana and Sierra Leone. To establish this value chain, it has negotiated with several West African governments and industry bodies. In the process, Dangote has accounted for the political and economic realities of each country. In some, such as Senegal, it has taken a cooperative approach—negotiating a market share with domestic producers—rather than trying to win it through competition.[54] Such negotiations have been important not only for value chain development but also market access. In Togo, the company negotiated with the government to pay an informal fee for using the country's road network and partnered with local business groups to assist in market access.[55]

Made up of multinational companies, the African Association of Automotive Manufacturers (AAAM) is driving the establishment of "auto pacts" to enable auto manufacturing to happen at scale.[56] These auto pacts involve "hub and spoke" value chains in each of Africa's main regions: some countries would host assembly hubs, and others would produce and supply components to them.[57] This initiative is at an early stage and not without challenges, but there are signs of tangible progress.[58] The AAAM is currently working with auto manufacturers and South African and Namibian governments to secure investment in component production in Namibia to supply to South African auto manufacturers. It is also working with governments across the continent to advise and build capacity in specialized areas, such as customs issues, standards, homologation and automotive policy.[59] Auto manufacturing has also seen private sector-led regional cooperation in South America. In 1987, Ford and Volkswagen established AutoLatina—a joint venture operating in Argentina and Brazil—to compete against Japanese manufacturers. The Argentinian and Brazilian governments subsequently signed several bilateral trade and economic cooperation agreements, partly to support collaboration in auto manufacturing.[60]

Establishing mineral value chains will require more proactive leadership of governments and regional institutions than the examples above. Without government leadership, for example, mining companies—particularly given most are backed by foreign capital—will have little incentive to coordinate value addition facilities or develop the African market in the way that auto manufacturers are, given global demand for minerals and increasingly integrated mineral value chains.

Moreover, few African firms operating further along the mineral value chain possess the cross-border political and economic influence of a company like Dangote, limiting their ability to drive regional integration independently. Government policy is also critical to ensuring value chain development contributes to longer-term structural transformation, for example, by promoting partnerships between foreign and African firms that facilitate technology and knowledge transfer.

However, government policy must be based on robust understanding of the sector and commercial realities. Ethiopia's successful efforts to move along the apparel value chain highlight the benefit of proactive government policy based on close consultation, coordination and iteration with the private sector to ensure sufficient investor interest. In this example, the Ethiopian government spent time getting to know the industry and consulting with different actors across the value chain. It then engaged a large international buyer to encourage its suppliers to move their operations to Ethiopia, closely collaborating with the suppliers to set up special economic zones that offered the right conditions.[61]

Many governments and regional institutions could benefit from obtaining more private sector input. Most RECs have a counterpart private sector organization, such as the COMESA, EAC and ECOWAS Business Councils. However, analysis from the European Centre for Development Policy Management (ECPDM) suggests that private sector input into REC strategies and policies is often weak, and this represents a key factor in their limited implementation.[62] Similarly, while the private sector is now being engaged to advance the DRC-Zambia battery precursor project, a combination of the Congolese and Zambian governments, regional institutions and external actors, such as the U.S., led its conception with little private sector involvement.

However, there are increasing examples of promising practice. The AfCFTA Secretariat and Nelson Mandela School at the University of Cape Town have established a platform to connect public and private sector actors through several working groups to support learning on the opportunities and barriers to regional value chains for cotton, textiles and apparel and support strategy development.[63] A similar approach could be taken on minerals, with different working groups focusing on specific value chains and formed of the relevant public and private actors.

While private sector engagement will be critical for the establishment of regional mineral value chains, care must be taken to mitigate the risk of corruption and state capture that arises from such relations and leads to suboptimal policymaking. For example, following a trade deal between Morocco and the EU in 2000 that lowered Moroccan tariffs on European imports, politically connected manufacturing firms in Morocco received higher non-tariff protection.[64] The Initiative for the Integration of Regional Infrastructure in South America (IIRSA) was successful in improving energy and transport infrastructure in South America in the 2000s, but it suffered from corruption and was embroiled in the infamous Operation Car Wash bribery scheme.[65]

Industrial policy experts describe getting the right balance in public-private relations as the most important element of policy design.[66] Equipping policies, practices and projects with strong integrity safeguards—whether at the regional or national level, or dealing with foreign or domestic companies—is critical to achieve this balance.[67] Public-private engagement platforms should have civil society representation. Policy mechanisms, including the processes for designing and granting any financial support, should be subject to the appropriate legislative oversight. They should also be published in an accessible manner to allow other accountability actors to exercise active oversight. Governments and regional institutions should ensure transparency around any projects that receive their support. This could include publishing feasibility studies to demonstrate that projects are likely to achieve their stated aims, as well as disclosing the beneficial owners, amounts and conditions of any financial support. Regulators should also ensure that the relevant independent auditor at the national or regional level audits these financial flows.

Sharing the benefits between countries

Countries will inevitably benefit from regional mineral value chains to varying degrees. Value chains will develop based on commercial realities. Overly prescriptive efforts to spread activities across countries—even if made commercially viable through public support—could ultimately limit the continent's total gains. However, efforts to ensure the benefits of regional cooperation are shared between participating countries will be critical for overcoming perceptions and tempering realities of differentiated gains.

Practitioners in the minerals sector are often sceptical about the likelihood of benefit-sharing mechanisms being sufficient to win public support. Citizen demands for value addition facilities to be constructed within their own countries makes it particularly challenging. However, examples of direct and indirect mechanisms in other sectors suggest that these can be effective, particularly if more-developed countries in Africa take a leading role.

While not set up to share the benefits of regional value chains, the revenue-sharing formula of the Southern African Customs Union (SACU)—comprising Botswana, Eswatini, Lesotho, Namibia and South Africa—demonstrates the political feasibility of agreeing on mechanisms that explicitly favor less-developed member states. Under the arrangement, importers pay customs and excise duties into a common revenue pool, which is distributed among members using a formula with three components. First, the customs component is allocated according to each country's share of total intra-SACU imports. Second, the excise component—representing 85 percent of excise revenue—is distributed based on each country's share of total SACU GDP. Finally, 15 percent of total excise revenue, the development component, is allocated inversely to GDP per capita, benefiting poorer members.

For countries like Eswatini and Lesotho, SACU transfers make up a substantial share of the total government revenue.[68]

Regional initiatives have also used development funds and trade adjustment programs to ensure benefits are shared. The Association of Southeast Asian Nations (ASEAN) was created in 1967 between Indonesia, Malaysia, the Philippines, Singapore and Thailand. The addition of four less-developed countries in the 1980s and 1990s—Brunei, Lao, Myanmar and Vietnam—raised concerns over cooperation worsening the development gap, particularly with the establishment of the ASEAN free trade area (AFTA) in 1992. ASEAN gave these four countries more time to adjust to free trade rules and established the Initiative for ASEAN Integration & Narrowing Development Gap. This initiative includes the ASEAN Economic Cooperation Fund for channeling financial and technical assistance from the region's most-developed countries to its least-developed countries, including for infrastructure and regulatory capacity.[69]

Benefits are still not equally distributed, but less-developed countries have generally benefited from AFTA. For example, AFTA has stimulated an apparel value chain with Thailand hosting the more capital-intensive textile production, marketing and merchandising, and Cambodia, Laos, Myanmar and Vietnam hosting garment production. Similarly, the EU's European Regional Development Fund aims to reduce regional disparities by investing in the poorer parts of member states, with more-developed member states contributing more to the fund than less-developed member states.[70]

The SACU revenue-sharing formula has informed benefit-sharing proposals in both the SADC Regional Mining Vision and the AGMS.

→ Box 2

The benefit-sharing mechanisms proposed in the African Green Minerals Strategy[71]

1. **Local African content**, whereby countries recognize Africa-wide content in their local content requirements, but recognition is weighted in favor of least-developed countries (with the suggestion to use the inverse of GDP per capita).[72]
2. **A green mineral value chain investment fund** for projects involving African companies, capitalized by foreign mining companies, foreign mining supplier companies, regional institutions, external partners and other funds, with projects in least-developed countries eligible for extra funding (based on the inverse of GDP per capita).[73]
3. **Critical skills and innovation funding** through countries requiring investors to spend a minimum of 5 percent of payroll on developing local science, technology, engineering and mathematics skills and 1 percent of sales revenue on local research, development and innovation, with spend in other countries being recognized based on their level of development.[74] Regional centers of excellence would also be twinned across the continent, with stronger institutions developing the capacity of weaker ones.
4. **Infant industry protection**, through which countries below the African average GDP per capita could impose import tariffs of up to 10 percent on other members within the AfCFTA framework for up to seven years to improve their competitiveness.

Each of the benefit-sharing mechanisms set out in the AGMS could, if well implemented, support the development of regional value chains in different ways (provided they still allow projects to generate sufficient returns to secure investment). The most relevant mechanism for establishing value addition facilities is the green mineral value chain investment fund. Its funding formula could channel more support to less-developed countries, such as the DRC, than to more-developed countries, such as South Africa. This could help offset disparities in investor interest caused by differences in other success factors, such as energy costs or access to chemical inputs, reducing the risk of more-developed countries dominating value chains. However, the design of the fund will need to strike a balance between maximizing overall investment and directing capital to less-competitive locations in ways that produce the greatest regional benefit.

Such an investment fund could also encourage the sharing of value addition (and mining supplier) facilities. The failed attempt in 2005 to establish a regional coltan refinery in South Africa—intended to process minerals from across SADC and EAC—illustrates the particular challenge of reaching agreement on shared facilities. In this example, South Africa was the only viable site because it had the sole facility with the necessary technology and key inputs, notably hydrofluoric acid. Yet even with this physical constraint and a proposal to allocate equity shares to producer countries according to their supply, the countries involved could not agree. Shared facilities may be more feasible if countries that do not host the facility receive a share of all the government revenue it generates—not just dividends from an equity share—along with guaranteed opportunities for their workers, goods and services. Alternatively, they could receive a larger share of revenue to compensate for foregone payroll and other supply-chain benefits.[75] The investment fund envisioned in the AGMS could earmark some of its funding for such initiatives (if deemed viable and beneficial) to incentivize countries to at least scope out the opportunities for such cooperation.

The mechanisms set out in the AGMS are novel and potentially workable proposals, but it is unclear whether governments are ready to embrace them. Another approach to ensuring mutual benefits from regional value chains would be for more-developed African countries to take a leadership role and directly support investments in less-developed countries.

More-developed countries have the potential to make or break cooperation efforts. As noted above, they can make coordination more challenging to achieve by, for example, capturing the most lucrative parts of value chains and running large trade surpluses in manufactured goods with neighboring countries. On the other hand, they can use their resources and capabilities to adopt a more far-sighted approach by actively promoting activities and creating buy-in in less-developed countries, thereby underpinning longer-term viability as well as showcasing the overall advantages of greater regional economic integration. Japan has demonstrated the positive impact that wealthier, more-industrialized countries can have on regional cooperation with the model of regional economic development that it pursued in Asia in the 20th century. Recognizing the benefits of a larger, more-developed regional market, Japan has supported its private sector efforts to establish production bases in several ASEAN countries and been the largest contributor to the Initiative for ASEAN Integration to reduce development disparities.[76] Similarly, Brazil—with the largest industrial sector in South America—showed regional leadership as a key driver in establishing the IIRSA.[77]

The willingness of Africa's more-developed countries to play a similar leadership role is uncertain. For example, neither South Africa nor Nigeria have thus far shown the necessary political support to AfCFTA to drive the initiative forward.[78] The South African government has also historically seemed to lack the will or capacity to prioritize regional goals.[79] It has supported investment in other countries in the region at times, but the developmental benefits for these countries has often been limited. For example, the Mozal aluminum smelter in Mozambique, developed with South African support, is perceived to have unfairly benefited South Africa more than Mozambique, with foreign and South African companies capturing most of the profit and jobs.[80] The broader Maputo Development Corridor, established by Mozambique and South Africa in 1996, is similarly seen to have exacerbated rather than reduced disparities in the development of the two countries—South African exports have been much greater than Mozambique exports along the corridor (excluding Mozambique's gas exports through the Pande-Temane pipeline constructed as part of the project).[81]

These experiences, combined with South Africa's considerable regional trade surplus, mean that other countries in the region tend to view the country with suspicion rather than as a potential ally in their value chain ambitions.[82] Other SADC countries are imposing restrictions on South African imports and pressurizing South African supermarket chains to expand sources of supply.[83] South Africa's exclusion from the DRC-Zambia project—as currently envisaged—might also be related to these issues, despite the clear benefits that collaboration with South African-based expertise, skills and manufacturing capacity would generate.

Strengthening the capacity of regional institutions

Governments will be crucial for regional cooperation efforts, whether by playing a leadership role; developing industrial policy to respond to market failures at the national level; or negotiating benefit-sharing mechanisms or investor contracts. However, because of difficult political economy dynamics, most governments are likely to devote their political capital, time and money to projects that explicitly serve national interests (whether these benefit broad society or narrow elite interests). Regional institutions therefore have a crucial role in planning, supporting and advocating for effective regional strategies and projects (developed in close consultation with country-level stakeholders). Ensuring these institutions have adequate technical capacity and financial resources is essential. Given that the minerals sector and its associated value chains are evolving rapidly in Africa and globally, it is also important to prioritize well-resourced, dynamic research and planning units within them.

The example of IIRSA shows the significant role that financially and technically capacitated regional institutions can have in driving specific regional projects. With the agreement of South American governments, three regional development banks led the implementation of IIRSA from 2000.[84] Within a few years, they had—in coordination with government planning, infrastructure and energy entities—proposed hundreds of energy and transport projects from which the governments selected a portion on which to prioritize. While the governments removed agency from the development banks over time (as IIRSA was brought under the newly established Union of South American Nations in 2008), development bank technical assistance remained instrumental in designing projects. Political differences ultimately caused regional cooperation to break down in the 2010s, but regional development banks have recently renewed efforts to revive it.[85]

WAEMU's successful introduction of a Community Mining Code also demonstrates the crucial role that regional institutions can play in securing government buy-in to regional initiatives. Over several years, the WAEMU Secretariat facilitated analysis to demonstrate to governments the benefits of harmonizing the legal framework and organizing frequent convenings of government officials to build trust.[86] The political sensitivity and technical complexity of value addition means that even greater efforts will be required to establish regional value chains.

African institutions responsible for the minerals sector at the continental level—primarily the AU's African Minerals Development Centre (AMDC), AfDB's African Natural Resources Management and Investment Centre (ANRC), and ECA—are making concerted efforts to advance regional value chains. These efforts are evident in the development of frameworks like the AMV and AGMS, as well as support for initiatives such as the DRC-Zambia battery precursor project. However, the AMDC has struggled to become fully operational since its establishment in 2013. It remains unrecognized by at least 15 member states, and the location of its permanent offices has yet to be determined.[87] These issues have compounded the broader challenge faced by AU institutions, namely, the limited mandates to enforce or support implementation.[88] AMDC, ANRC and ECA all also face significant resource constraints, with limited budgets and few expert staff. These constraints have hindered their ability to ensure effective government implementation of regional initiatives, such as the AMV.[89]

Capacity challenges are even greater for RECs. For example, limited capacity was one of the obstacles in the implementation of SADC's Regional Mining Vision.

The SADC Protocol on Mining in 1997 provided for the establishment of three bodies:

1. **A Committee of Mining Ministers**, including the minister responsible for mining from each member state to establish and design mining policies and identify opportunities for collaboration.
2. **A Mining Technical Committee of Officials**, comprising officials from each member state with the goal of providing technical support and advice to the Committee of Mining Ministers.
3. **A Mining Coordinating Unit**, which serves as the Secretariat for the mining sector and shoulders the core task of implementation, given inputs from the above committees.[90]

However, SADC closed the Mining Coordinating Unit during a restructuring in the late 1990s, consolidating all sectoral coordination functions into four centralized directorates. Since then, specialist capacity to drive regional cooperation on mining has been limited. In turn, this has contributed to an infrequency of meetings between mining ministers, hindering effective engagement between regional and national actors.[91] The lack of regular meetings also reflects limited political interest in cooperation. Yet, the SADC Secretariat lacks the internal research and advocacy capacity needed to stimulate greater political engagement. Without this capacity, it struggles to build awareness among key government officials and policy actors about the potential benefits of a regional approach to mineral value addition.

Stronger institutional capacity will also be needed to improve internal coordination. Advancing regional value chains will require effective cross-sectoral coordination. The new SADC Mining and Minerals Development Protocol, awaiting finalization, proposes joint meetings between mining and industry ministers—an important step forward if realized. However, current coordination between policy areas within RECs remains limited, and this is also true at the continental level. Mining, infrastructure and industrial strategies are typically developed and approved through separate processes involving different regional and national actors.[92]

Funding is a key cause of these capacity challenges. While the protocol encourages member states to mobilize finance, their ability to do so depends on domestic political will and fiscal capacity, which is often lacking. External partners should step up to provide more funding for these regional institutions, as discussed in more detail in the following section. Other proposals include the AU establishing mineral audit capacity, with revenue recovered from illicit financial flows shared between the affected country and the AU, and the AU's share being used to support regional cooperation.[93]

A perhaps more contentious question is the amount of authority that regional institutions should have in the implementation of regional value chain projects. The lack of such authority in the development of the Capricorn Bioceanic Corridor—an infrastructure initiative connecting Argentina, Brazil, Chile and Paraguay, and providing a transport link between the Atlantic and Pacific Oceans—has been identified as hampering progress. It has resulted in a lack of follow-up and enforcement of government commitments.[94] The benefit of having this authority is also demonstrated in the differing performance of Africa's regional power pools. A centralized approach to the West African Regional Power Pool, with an ECOWAS commission that has the authority to issue binding regulations and a Project Advisory Unit to oversee implementation, appears to have been an important factor in its relative success compared to the other power pools.[95]

A similar approach to regional mineral value chains could be beneficial, for example, by making the mechanisms set out in the AGMS binding and ensuring oversight and enforcement of benefit-sharing to build trust. However, a prerequisite for governments providing authority to regional institutions will be their appreciation of the longer-term benefits of regional cooperation. This reinforces the importance of increasing the capacity of regional institutions to demonstrate those benefits, as well as coalitions of willing governments providing proof of concept.

External support that ensures African ownership

Given the limited technical and financial capacity of Africa's regional institutions, as well as structural barriers such as high financing costs and infrastructure gaps, external partners will play a critical role in enabling regional cooperation on mineral value chains. However, the political complexities of this cooperation and the need for sustained engagement across a myriad of regional and national actors makes strong African leadership—and ownership—particularly critical. The importance of maintaining strategic neutrality amid increasing geopolitical competition further underscores this need.

Africa's regional institutions and initiatives currently rely heavily on funding from external partners. For example, nearly two-thirds of the AU's budget for 2024 was to be financed from external sources (the actual proportion is likely to be higher, with member states tending to at least partially default on their contributions).[96] While crucial, this external support also generates several obstacles to effective regional cooperation.[97]

External support often comes with program design and conditions that are based on those funders' own agendas and experiences. Often, they do not reflect the actual needs and interests of African countries or align with their capabilities, norms or political and economic realities. This misalignment has hindered, for example, regional cooperation efforts on Africa's 63 shared river basins, with regional organizations attempting to advance the Integrated Water Resources Management (IWRM) approach. Although IWRM is widely recognized as an international best practice, it is not aligned with the priorities of many African countries. It fails to fully accommodate, for example, the strategic importance placed by African governments on water resources for energy production and large-scale irrigation.

Nevertheless, since donor funding has been conditioned on IWRM approaches, regional organizations have tended to embrace IWRM-centric agendas. In doing so, these organizations have failed to secure sufficient political support from governments.[98]

External funding can also reduce a sense of ownership, accountability and commitment from African countries. For example, while China initially funded and managed the Tazara railway line between Tanzania and Zambia, there was limited cooperation once management was taken over by Tanzania and Zambia due to rivalries and capacity issues.[99]

These challenges underscore the need to fund capacity development in regional institutions, and particularly their planning capacity, as a central element of external support. Shifting to such a focus would better enable these bodies to lead the identification and design of cooperation opportunities, ensuring African ownership and reducing the risk of misalignment with domestic interests. External partners should also aim to support existing initiatives identified by the regional institutions. This includes engaging AMDC to explore how to best support the AGMS, including by contributing to advancing the planning and capitalization of the green mineral value chain investment fund.

As regional opportunities continue to be identified and pursued, external partners could commit to further supporting these. The EU's COMESA Regional Integration Support Mechanism is an example of good practice. This mechanism compensates member states for the adjustment costs of implementing existing regional programs. In doing so, it has increased the focus of member states on commitments that they have made and their incentive to implement them.[100]

External partners must also coordinate between themselves to ensure their support is complementary. As part of this, external partners should ensure that their country-level engagements are not contradictory—for example, by diverting supply away from promising regional value chain opportunities. Efforts to improve donor coordination have been improving—for instance, in relation to core support to the AU.[101] Increasing international tensions in general—and the geopolitical sensitivity of minerals specifically—means achieving coordinated support on minerals is arguably a more challenging task. However, there are collaboration opportunities, such as between China and the EU, even amid geopolitical tensions.[102] One potential platform for facilitating coordination has arisen from the United Nations Secretary-General's Panel on Critical Energy Transition Minerals that convened in 2024. The panel proposed the establishment of a High-Level Expert Advisory Group that would work across governments and other stakeholders to mobilize resources for, among other things, value addition in mineral-producing countries.[103]

External support to the continent's mineral value chain ambitions is not just in Africa's interests. Continuing inequities in global value chains are likely to exacerbate public frustration in African countries, further increasing the risk of mineral supply disruptions and resulting in less global cooperation on supply chain management and other issues, such as tensions around the climate crisis.[104] Under the right conditions, value addition in African countries can also reduce costs and emissions from these industries, leading to more efficient and greener value chains.[105] However, African policymakers could more explicitly link support to the interests of external partners. For example, capitalization of the green mineral value chain investment fund could provide proportionate access to the products of the projects it invests in.[106]



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Fostering public support

Public support, or at least acceptance, of regional cooperation is critical for its success: both to increase the likelihood of political backing in the short term as well as sustained government support in the longer term, including during changes in political conditions. For example, while the Maputo Development Corridor was initially driven by the support of the Mozambique and South African presidencies, without public support to act as a bulwark against domestic opposition and new governments taking office with new agendas and priorities, momentum dissipated.[107] The Maputo Corridor Logistics Initiative, set up by investors, service providers and users of the corridor in 2004, collapsed, and further investment along the route has not materialized.

Governments and regional institutions can secure public buy-in several ways. As many African countries have already experienced in relation to the mineral sector, transparency is essential for building trust, while secrecy fuels suspicion and public opposition. Governments and regional institutions should disclose feasibility studies, environmental and social impact assessments, cost-benefit analyses and any resulting contracts for projects along the mineral value chain. Therefore, the limited public information on the DRC-Zambia battery precursor plans to date—for example, the non-disclosure of their cooperation agreement, subsequent framework agreement and the prefeasibility studies—does not bode well. In fact, Congolese and Zambian civil society actors have established the Pamoja Critical Minerals Forum to raise such concerns.[108]

Consulting and ensuring active engagement of a broad set of stakeholders in the design and implementation of cooperation is also critical. For example, the lack of engagement by Mozambique and South Africa with diverse local government agendas, affected communities and local labor and business interests (such as private sector associations) was part of the reason for stalled momentum on the Maputo Development Corridor. Finally, governments should engage in broader public outreach. ASEAN countries, for example, successfully conducted extensive media campaigns to promote the free trade area to the broader public, explaining why it would be beneficial even for less-developed countries.



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Conclusion

Increasing African ambitions to move along mineral value chains underscores the importance of regional cooperation for the continent's development. The launch of the AfCFTA and recent adoption of Africa's Green Mineral Strategy have raised hopes that meaningful cooperation can be achieved. However, realizing this vision will require overcoming a myriad of political, economic and technical challenges at both national and regional levels.

As this report has outlined, there are valuable lessons to draw from other regional initiatives within Africa and beyond. Based on these experiences, we have identified six ways to improve the chances of establishing regional mineral value chains:

1. **Start small and targeted:** Build coalitions of willing governments around specific value chain opportunities, and allow technical capacity and trust to grow.
2. **Engage the private sector:** Transparently engage local and foreign private sectors to identify and understand the market failures preventing value chain development and the opportunities available to advance it.
3. **Share the benefits:** Explore mechanisms that ensure all participating countries benefit—including through Africa's more-developed countries showing leadership by supporting investments elsewhere in the region.
4. **Strengthen regional institutions:** Expand the capacity and resources of regional institutions, particularly their research and planning functions, to improve design and advocacy of regional cooperation.
5. **Ensure African ownership:** External partners should play an enabling—not driving—role, supporting regional institutions and initiatives while ensuring African leadership.
6. **Foster public support:** Use transparency, multistakeholder consultation and public outreach to build citizen buy-in and lasting political commitment.

Applying these principles to specific opportunities will require further work. However, by putting these foundations in place, African governments, regional institutions and external partners can bring regional mineral value chains closer to reality.



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About the authors

Silas Olan'g is an Africa energy transition advisor at the Natural Resource Governance Institute (NRGI). Thomas Scurfield is an Africa senior economic analyst at NRGI. Anthony Black is an Emeritus Professor in the School of Economics at the University of Cape Town. Michael Smith is a Lecturer in the School of Economics at the University of Cape Town.

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