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RESEARCH ARTICLE

In the crosshairs: Twenty-first-century superpower rivalry for Africa's critical minerals

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Abstract
This paper explores the complexity of superpower rivalry in the scramble for control of Africa's abundant mineral resources. African governments are wary of diplomatic, economic, and sometimes military interventions, having experienced them all before. The twenty-first-century legacy is a distrust of Western motives, even as fresh development opportunities present themselves through Africa's 'green' and strategic mineral wealth. African nations are desperate to kickstart growth and view the combination of local mineral wealth and non-Western capital sources as a catalyst for overcoming crippling poverty. Yet, Africa's abundance of critical minerals is impacting security, potentially leading to competition and conflict rather than peace and prosperity. China is pursuing a 'grand strategy' geared towards enhancing its own national security, rather than that of Africa, through control and often ownership of critical mineral supply chains. Russia is also present in Africa, but there is no grand strategy, just opportunistic strategic liaisons between proxy paramilitary groups and undemocratic African governments. The West is now belatedly ramping up engagement with Africa in a bid to protect its national security interests. Governance is critical for ensuring that superpower rivalry over scarce resources does not destabilise the continent, but rather acts as a transformative force for African development.

Keywords: Africa; blood minerals; conflict; counter-trade; critical minerals

Introduction

Africa is the world's last development frontier, with the continent housing a large swathe of the world's poorest nations. The average poverty rate in sub-Saharan Africa is approximately 41 per cent and is home to twenty-seven of the world's twenty-eight poorest countries.[1] African states are invariably blighted by a wide spectrum of destabilising influences, including endemic corruption, military coups, insurgency, terrorism, financial deficiency, capital flight, economic mismanagement, infrastructural inadequacy, weak governance, minimal transparency and accountability, and, among the ruling elites, nepotism and tribalism. While demand insufficiency and weak income generation define poor nations, economic transition is feasible if countries fortuitously possess scarce natural resources, such as oil and gas, to drive export-led growth and wealth creation. The Gulf states offer excellent case studies of this development model. The United Arab Emirates (UAE), for example, transformed itself from a 1950s economy, centred almost entirely on fishing, into

[1]Taylor Laube-Alvarez, 'The misattribution of Africa's natural resource wealth: An examination of the diamond industry', *Wilson Center* (1 October 2022), available at: {https://www.wilsoncenter.org/blog-post/examination-of-the-diamond-industry}.

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one of the world's richest states, and is presently intent on evolving new and dynamic comparative advantages in fourth industrial revolution (4iR) technologies, such as artificial intelligence, space, additive manufacturing, and 'green' energy transition technologies. The twenty-first-century policy imperative of energy transition through electric, solar, and wind technologies is driving a global appetite for the material inputs required to produce these new sustainable energy sources. At the heart of these green technologies are critical minerals, representing the motive force for reducing carbon emissions.[2] As the global demand for cleaner energy solutions increases, the growth trajectories of critical minerals will be robust, especially as they possess dual-use applications and are therefore essential for not just energy renewal but also next-generation military technologies.

The West's strategy for accessing Africa's natural resources, including critical minerals, has been foreign direct investment (FDI), principally via multinational companies (MNCs). In the early post-WWII era, Western MNCs were viewed as effective mechanisms for kick-starting the economic transformation process. Just two decades later, however, MNCs faced criticism from the Latin American school, headed up by Prebisch and Furtado, for perpetuating the cycle of imperial exploitation and creating *dependencia*.[3] This pushback against Western MNCs was an early manifestation of the wider 'South' country antipathy towards not only corporate FDI but, indeed, the perceived Western-dominated international trade order. Western nations were viewed as economic forces manipulating international trade for their benefit, to the detriment of poorer nations. Africa's alienation from the West was heightened by the latter's apparent disinterest in supporting the continent's development. Covid-19 and the Russia–Ukraine conflict soon changed the West's isolationist stance, especially the disruptive impact these events had on international supply chains, putting economic and military security at risk.

Of particular concern was the fragility of critical mineral supply chains, given the belated recognition that China had emerged as the world's largest refiner of many of these resources, such as 68 per cent of nickel, 40 per cent of copper, 59 per cent of lithium, and 73 per cent of cobalt.[4] According to research by the Congressional Research Service, the United States (US) is 100 per cent import reliant on fifteen minerals on the critical minerals list, and more than 75 per cent import reliant on sixteen others.[5] It is unsurprising, therefore, that the US has recently demonstrated enthusiasm to access African markets, but it comes after decades of growing Chinese investment activity, representing the 'new colonialism'.[6] Resource sovereignty is thus in vogue, but the urgency for the West is accentuated as both China and, to a lesser extent, Russia have for some time been pursuing proactive long-term strategies to gain control over strategically important critical minerals in sub-Saharan Africa – a region that reportedly accounts for more than 30 per cent of global critical mineral value.[7] An important additional dimension of Sino–Russian engagement in the continent's mining sectors has been the opportunity to gain diplomatic influence in fragile and failed states.

[2]The Energy Act of 2020 defines a 'critical mineral' as a non-fuel mineral or mineral material essential to the economic or national security of the United States, and that has a supply chain vulnerable to disruption (United States Geological Survey, 2022). See Vlado Vivoda, Ron Matthews, and Jensine Andresen, 'Securing defense critical minerals: Challenges and U.S. strategic responses in an evolving geopolitical landscape', *Comparative Strategy*, 44:2, 281–315 (2025), for a comprehensive definitional framework of critical minerals.

[3]Cristobal Kay, 'Reflections on the Latin American contribution to development theory', *Development and Change*, 22:1, 31–68 (1991), https://doi.org/10.1111/j.1467-7660.1991.tb00402.x.

[4]Bradley Intelligence Report, 'Africa and the global race for critical minerals', Insights & Events, Bradley.com (31 August 2023), available at: {https://www.bradley.com/insights/publications/2023/08/africa-and-the-global-race-for-critical-minerals}.

[5]*Mineral Commodity Summaries 2024* (U.S. Geological Survey [USGS], 2024), available at: {https://pubs.usgs.gov/periodicals/mcs2024/mcs2024.pdf}.

[6]Elizabeth Manero, 'China's investment in Africa: The new colonialism?', *Harvard Political Review* (3 February 2017), available at: {https://harvardpolitics.com/chinas-investment-in-africa-the-new-colonialism/}.

[7]Wenjie Chen, Athene Laws, and Nico Valckx, 'Harnessing sub-Saharan Africa's critical mineral wealth', *International Monetary Fund* (29 April 2024), available at: {https://www.imf.org/en/news/articles/2024/04/29/cf-harnessing-sub-saharan-africas-critical-mineral-wealth}.

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Conflict, real and potential, has proved an inevitable consequence of Sino–Russian interventions, endorsing research findings that suggest natural resources and conflicts are inextricably linked, especially in resource-endowed developing nations.[8] In fact, natural resources have played a role in up to 40 per cent of all intra-state conflicts.[9]

These introductory comments provide the contextual backdrop to the complexity of resource competition in Africa. Yet, superpower rivalry for critical minerals is specific to the countries where they are located, suggesting that the potential for transformative development or, indeed, destabilisation will vary from one African state to another. In those countries where significant critical mineral reserves are located, the scramble for them has been institutionally orchestrated by 'unfriendly' governments pursuing their own national agendas, but leaving the question of African economic security unanswered. A possible partial solution is to focus on resource processing and refinement, not just extraction, as a lever for promoting indigenous African resource-led industrialisation, but implementation, as ever, represents the real challenge. While the potential for 'trickle-down' development is real, it is inconceivable that economic transformation can be forged in a security vacuum, suffering the uncertainties, risks, and vulnerabilities engendered by super- and local-power rivalries. The purpose of this paper is, thus, to explore the role of nations adversarial to Western interests, principally China and Russia, in accessing Africa's strategically important critical mineral reserves. Analysis begins with a brief overview of Africa's potential as a major global source of critical minerals. The next section evaluates China's role by reference to its geoeconomic 'Grand Strategy' as applied to Africa's critical minerals market. Attention then switches to analysing Russia's controversial engagement in Africa's critical minerals and mining sectors. The penultimate section examines the West's belated institutional response to Sino–Russian strategic geoeconomic manoeuvring in Africa. While acknowledging the West has a long history of mineral extraction by powerful corporate mining conglomerates, analysis highlights the recent courting of African states by the US and the European Union (EU) through high-level government investment programmes designed to strengthen both Western critical mineral supply chains and local industrial take-off. A conclusions section brings the study to a close.

Africa's critical mineral treasure trove

Sub-Saharan Africa is potentially at a development inflexion point, given the projected meteoric global growth in demand for strategic resources. The World Bank, for example, has projected that a 50 per cent rise in the production of key minerals and metals by 2050 is needed to meet global demand.[10] As Africa produces 77 per cent of the world's platinum, 76 per cent of its cobalt, 75 per cent of its diamonds, 44 per cent of its chromium, and 65 per cent of its manganese, it is clear why the continent has become the world's critical mineral battleground.[11] Arguably, Africa is at the start of an evolving mineral–energy complex that has the potential to transform the political economy of its poorer states.[12] Exports of minerals and metals already account for a substantial proportion of total product exports for twenty-three African countries, reaching peaks of over

[8]J. Diemel and D. Hilhorst, 'Unintended consequences or ambivalent policy objectives? Conflict minerals and mining reform in the Democratic Republic of Congo', *Development Policy Review* (1 July 2019), https://doi.org/10.1111/dpr.12372; Päivi Lujala, 'The spoils of nature: Armed civil conflict and rebel access to natural resources', *Journal of Peace Research*, 47:1, 15–28 (2010), https://doi.org/10.1177/0022343309350015.

[9]United Nations Peacekeeping, 'Conflict and natural resources', available at: {https://peacekeeping.un.org/en/conflict-and-natural-resources}, accessed [April 24, 2026].

[10]Kirsten Hund et al., 'Minerals for climate action: The mineral intensity of the clean energy transition'. *World Bank* (2023), available at: {https://documents.worldbank.org/en/publication/documents-reports/documentdetail/099052423172525564}

[11]Bright Simons, 'The "strategic mirage" of Africa's green minerals wealth', *ODI* (16 May 2024), available at: {https://odi.org/en/insights/the-strategic-mirage-of-africas-green-minerals-wealth/}.

[12]J. Page and F. Tarp (eds), *Mining for Change: Natural Resources and Industry in Africa* (Oxford University Press, 2020).

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75 per cent for Botswana, Zambia, and the Democratic Republic of Congo (DRC).[13] In the latter country alone, untapped minerals, including gold, cobalt, and high-grade copper reserves, are estimated to be worth more than US$24 trillion.[14] In 2024, the DRC was the world's largest cobalt miner, producing around 76 per cent of global capacity and possessing globally significant lithium deposits.[15]

For many African countries, the mining sector is the main source of FDI and a major stream of mineral rents on which these governments depend.[16] The McKinsey Group has predicted that Africa could generate between US$200 million and US$2 billion of additional annual revenue by 2030 and create up to 3.8 million jobs by building a competitive, low-carbon manufacturing sector.[17] Indeed, the International Energy Authority estimates that between 2022 and 2050, the global demand for nickel will double, cobalt triple, and lithium will rise ten-fold.[18] Over the next twenty-five years, global revenues from the extraction of just four key minerals – copper, nickel, cobalt, and lithium – are estimated to total US$16 trillion, with Africa reaping 10 per cent and contributing to an increase of 12 per cent or more of Africa's GDP.[19] Clearly, then, an opportunity presents itself, whereby Africa's repository of critical minerals could become the equivalent development driver as the energy sector was in the Gulf, acting as the catalyst for entering into a virtuous cycle of growth and development. Yet, the reality is that poorer country governments traditionally struggle to collect and direct these mineral rents towards the effective transformation and diversification of their economies.[20] While historical cases show how abundant mineral resources need not necessarily be linked to a 'resource curse',[21] the fact is that Africa's mining sector has so far played only a marginal role in structural transformation.[22] Despite possessing around one-third of global mineral reserves, Africa accounts for just 10 per cent of global mining exploration expenditure.[23]

This untapped capacity, alongside the recent global growth in demand for critical minerals, is fuelling intense superpower rivalry to access Africa's reserves, leading to a rapid transformation in the continent's supply capacity. For example, in 2025, Africa's share of global lithium production was 10.6 per cent, up from just 0.1 per cent in 2019,[24] and China's economic footprint on this capacity surge is ubiquitous. More than two-thirds of the continent's lithium output

[13]IEA, 'The role of critical minerals in clean energy transitions', *International Energy Agency* (2021), available at: {https://www.iea.org/reports/the-role-of-critical-minerals-in-clean-energy-transitions}.

[14]Oluwole Ojewale, 'What coltan mining in the DRC costs people and the environment', *The Conversation* (29 May 2022), available at {https://theconversation.com/what-coltan-mining-in-the-drc-costs-people-and-the-environment-183159}.

[15]ITA, 'Democratic Republic of the Congo – Mining and Minerals', *International Trade Administration* (14 March 2024), available at: {https://www.trade.gov/country-commercial-guides/democratic-republic-congo-mining-and-minerals}.

[16]A. Andreoni, 'On manufacturing development under resource constraints', in M. Baranzini, C. Rotondi and R. Scazzieri (eds), *Resources, Production and Structural Dynamics* (Cambridge University Press) 2015, 407–424.

[17]Kartik Jayaram, Adam Kendall, Ken Somers, and Lyes Bouchene, 'Africa's green manufacturing crossroads', McKinsey & Company (September 2021), available at: {https://www.mckinsey.com/~/media/mckinsey/business%20functions/sustainability/our%20insights/africas%20green%20manufacturing%20crossroads/africas-green-manufacturing-crossroads-choices-for-a-low-carbon-industrial-future.pdf}.

[18]Chen, Laws, and Valckx, 'Harnessing sub-Saharan Africa's critical mineral wealth'. These projections are conservative compared to IEA estimates, which predict lithium to increase thirteen times by 2040, with cobalt and graphite six to thirty times higher. See *IEA*, 'The role of critical minerals in clean energy transitions', March 2022, 1–283.

[19]Chen, Laws, and Valckx, 'Harnessing sub-Saharan Africa's critical mineral wealth'.

[20]A. Hirschman, 'A generalized linkage approach to development, with special reference to staples', in A. Hirschman, *The Essential Hirschman* (Princeton University Press, 1977) 155–194.

[21]Ramez Abubakr Badeeb, Hooi Hooi Lean and Jeremy Clark, 'The Evolution of the Natural Resource Curse Thesis: A Critical Literature Survey', *Resources Policy* 51 (2017), 123–134. https://doi.org/10.1016/j.resourpol.2016.10.015

[22]A. Andreoni, P. Mondliwa, S. Roberts, and F. Tregenna, (eds), *Structural Transformation in South Africa: The Challenges of Inclusive Industrial Development of a Middle-Income Country* (Oxford University Press, 2021).

[23]*Mining Review Africa*, 'Mining Indaba 2024 highlights revival of exploration pipelines' (16 January 2024), available at: {https://www.miningreview.com/investment/africa-mining-indaba-2024-highlights-revival-of-africas-exploration}.

[24]'Africa's white-gold rush', *Economist* (11 November 2023), available at: {https://www.economist.com/middle-east-and-africa/2023/11/09/china-is-winning-africas-white-gold-rush-for-lithium}

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comes from Zimbabwe, with China accounting for more than 90 per cent of the supply from entities at least partly owned by Chinese firms.[25] Chinese businesses were also instrumental in opening Nigeria's first lithium processing facility in May 2024.[26] China's growing economic dominance in Africa also extends to trade, enabling it to become one of the continent's biggest trading partners, enjoying annual trade worth nearly US$300 billion, servicing not just African customers but also the 3,000 Chinese private firms that operate across the continent.[27] Under government tutelage, Chinese companies operating in Africa have been instrumental in helping to fulfil China's grand strategy, especially through ownership and control of Africa's critical minerals.

Today, China is an increasingly important player in the African mining sector. In 2023, its total economic engagement was calculated at around US$21.7 billion, with estimates suggesting that US$8–10 billion of these engagements were focused on critical mineral projects.[28] Yet, surprisingly, this represents only 8 per cent of African mining output going to Chinese companies, less than half the share of its Western competitors.[29] The major Western players are Anglo-Saxon, excluding the US, which in 2023 had a relatively insignificant US$7.4 billion share of total corporate investment in Africa, with critical mineral investments reaching just US$300 million – a mere 4 per cent of total US investments.[30] Australia, by contrast, held corporate mining investments of US$60 billion in 2024,[31] sourced from 145 ASX-listed companies operating almost 500 mines across thirty-four African states, and Canada, which in 2023 had US$37 billion worth of assets in African mining.[32] New players, such as Japan and South Korea, are also beginning to expand their mining presence across the continent.

The data suggest that the West, through Australian and Canadian corporate operations, owns the preponderance of mining assets in Africa and raises the question of whether fears of Chinese domination of Africa's critical minerals sector are misplaced. The answer is no, based on the following four considerations. Firstly, while the share of Chinese investment in Africa's critical minerals sector is low, its growth has been dramatic. Between 2003 and 2020, Beijing signed strategic mineral partnerships with at least forty-four African states.[33] This has enabled its FDI in this sector to increase from just US$75 million to US$4.2 billion, with the trajectory accelerating in recent years, as reflected by China's 114 per cent growth of investment in 2023, much of which was accounted

[25]Ibid.

[26]William Clowes, 'China drives African litihium surge to lock in key battery metal', *Bloomberg* (12 August 2024), available at: {https://www.bloomberg.com/news/articles/2024-08-12/china-drives-african-lithium-surge-to-lock-in-key-battery-metal}.

[27]Jevans Nyabiage, 'China–Africa trade hit US$282 billion in 2023 but Africa's trade deficit widens, with commodity prices a key factor', *South China Morning Post* (1 February 2024), available at: {https://www.scmp.com/news/china/diplomacy/article/3250552/china-africa-trade-hit-282-billion-2023-africas-trade-deficit-widens-commodity-prices-key-factor}; Chido Munyati, 'Why strong regional value chains will be vital to the next chapter of China and Africa's economic relationship', *World Economic Forum* (25 June 2024), available at: {https://www.weforum.org/agenda/2024/06/why-strong-regional-value-chains-will-be-vital-to-the-next-chapter-of-china-and-africas-economic-relationship/}.

[28]Sydney Tucker, 'Competing for Africa's resources: How the US and China invest in critical minerals', *Stimpson Center* (28 February 2025), available at: {https://www.stimson.org/2025/competing-for-africas-resources-how-the-us-and-china-invest-in-critical-minerals/}.

[29]Desmond Egyin, 'Addressing China's monopoly over Africa's renewable energy minerals', *Africa Up Close: Wilson Center* (2 May 2024), available at: {https://www.wilsoncenter.org/blog-post/addressing-chinas-monopoly-over-africas-renewable-energy-minerals}.

[30]Tucker, 'Competing for Africa's resources'.

[31]Sabrina Jardim, 'Australian mining companies' investment into Africa reaches $60bn', *Mining Weekly* (5 September 2024), available at: {https://www.miningweekly.com/article/australian-mining-companies-investment-into-africa-reaches-60bn-2024-09-05}.

[32]Sarah Way, 'The strategies driving the players in competition for Africa's critical minerals', *Atlantic Council* (9 September 2024), available at: {https://www.atlanticcouncil.org/blogs/africasource/the-strategies-driving-the-players-in-competition-for-africas-critical-minerals/}.

[33]Ibid.

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for by mineral extraction.[34] Secondly, China is focusing its mineral investments on a few strategically important African countries. Around 71 per cent of Africa's critical mineral exports to China come from just five countries: South Africa, Angola, the Republic of Congo, Zambia, and the DRC.[35] The DRC alone mines about 76 per cent of the world's cobalt, with 80 per cent of its production sent to China for processing, and fifteen out of nineteen cobalt operations in the DRC are owned or financed by Chinese companies.[36] Thirdly, the West's mining investments in Africa include high proportions of non-critical minerals – for example, over half of Australia's mining output in Africa is coal (27 per cent), gold (16 per cent), and diamonds (13 per cent).[37] Fourthly, there is a Chinese government-led strategy to support its state-orchestrated companies accessing African critical mineral markets through various forms of sponsorship, such as financing, including loans and unorthodox trade mechanisms. Although the West may own a greater share of mining assets in Africa, its investment calculus has traditionally been based on *ad hoc* corporate portfolios in search of profit, rather than via a coherent and coordinated state-led strategy that mobilises investment and manages risk.[38]

China's grand strategy[39]

Beijing's targeted access to Africa's strategic resources is a core element of its grand strategy: the quest for global power propelled by a cultural and ideological fervour aimed at strengthening China's national security. Economic diplomacy (*jingji waijiao*), with Chinese characteristics, means that it employs the full panoply of economic measures to secure economic security (*jingji anquan*) and expand its overseas influence.[40] Accordingly, China's economic diplomacy comprises a rich tapestry of economic, diplomatic, political, social, and military objectives; indeed, any goal that aims to promote economic gain. The outcome of this comprehensive security paradigm is a modern-day equivalent of China's imperial 'tributary' system, which was principally aimed at satisfying its substantial demand for commodities, energy, and food. In the contemporary context, strategic resources, including critical minerals, can be added to this list, reflecting the communist ideology driving the 'going out' doctrinal mantra, held to be essential for national rejuvenation (*minzu zhenxing*).[41] The grand strategy may be interpreted as supremacy in the evolving

[34]Asia Financial, 'China investing in Africa again, focus on key energy minerals' (28 May 2024), available at: {https://www.asiafinancial.com/china-investing-in-africa-again-focus-on-key-energy-minerals}.

[35]Lina Benabdallah, 'China's role in Africa's critical minterals landscape: Challenge and key opportunities, *Africa Policy Research Institute* (6 September 2024), available at: {https://afripoli.org/chinas-role-in-africas-critical-minerals-landscape-challenges-and-key-opportunities}.

[36]Cade Ahlijian, 'Congo's cobalt controversy', *globalEDGE Blog* (20 April 2022), available at: {msu.edu}.

[37]'Australia's trade and investment relationships with the countries of Africa', Special Report, *Australia Parliament* (21 June 2018).

[38]Jevans Nyabiage, 'China still leads the pack in Africa's critical minerals race as US struggles to keep up', *South China Morning Post* (12 March 2025), available at: {https://www.scmp.com/news/china/diplomacy/article/3301506/china-still-leads-pack-africas-critical-minerals-race-us-struggles-keep}.

[39]Beijing's contemporary interpretation of 'Grand Strategy' mirrors that of Meade, who argued that it is 'the art of controlling and utilizing the resources of a nation…to the end that its vital interests shall be effectively promoted and secured against enemies, actual, potential, or merely presumed'. Meade elaborated by further arguing that this 'highest type of strategy' is precisely such because it 'so integrates the policies and armaments of the nation that the resort to war is either rendered unnecessary or is undertaken with the maximum chance of victory'. He concluded by stating that '[grand] strategy…is not merely a concept of wartime but is an inherent element of statecraft at all times'. See Edward Meade Earle (ed.), *Makers of Modern Strategy: Military Thought from Machiavelli to Hitler* (Princeton University Press, 1943), p. viii. Cited in Robert D. Blackwell and Ashley J. Tellis, 'Revising U.S. grand strategy towards China', *US Council on Foreign Relations*, Special report 72 (March 2015), p. 3.https://www.cfr.org/reports/revising-us-grand-strategy-toward-china

[40]Bingxi Zhen, 'Xin xingshixia ruhe baohu guojia haiwai liyi' [How to protect national interests overseas under new situation], *Goji Wenti Yanjiu* (2009). Cited in Timothy R. Heath, 'China's evolving approach to economic diplomacy', *Asia Policy* 22 (2016), p. 163.

[41]Xiao Tan, 'Chinese "going out" strategy', in Xiao Tan, *CHINA: Development Strategy of Learning from Developed Country* (China Social Sciences Press, 2003), pp. 5–6.

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Sino–American strategic rivalry,[42] leveraged on the legitimacy of employing all available policy instruments, including economic warfare,[43] to widen and deepen China's global influence. It represents a nuanced blending of development, defence, and diplomacy, reflected by President Xi's 2014 statement that 'development is the foundation of security, and security is the necessary condition for development'.[44] This nexus between development and security is a constant theme in China's interpretation of economic diplomacy, and its implementation in Africa involves three distinct though interrelated policy thrusts: the BRICS; the Belt and Road Initiative (BRI); and military (counter-)trade.

Collectivist diplomacy through the BRICS

Broadly, there are three strands to China's geoeconomic statecraft in Africa. Chronologically, the first strand was launched in 2009 and was known by its acronym, BRIC – a body comprising the world's emerging economic powers of Brazil, Russia, India, and China. The group's core thrust gelled around a consensus of interests aimed at fostering growth through a more equitable global economic order, achieved from the diminution of Western, and especially US, dominance of international economic and financial institutions. The BRIC goal was, and continues to be, to make institutions, such as the International Monetary Fund (IMF), the World Bank, and the World Trade Organisation (WTO), far more representative and empathetic of the 'South' countries' development needs. In 2010, the group's acronym was expanded by one letter to create the BRICS, reflecting the additional membership of South Africa. After more than a decade of stasis, further enlargement occurred in January 2024 to include new members Ethiopia, Egypt, Iran, and the UAE.[45] Six countries had been invited to join, but Argentina declined the invitation, and Saudi Arabia did not reach a decision, with the latter continuing to sit on the fence.[46] Indonesia increased the BRICS membership to ten when it joined in January 2025.[47]

To the surprise of Western observers, developing countries are queuing up to join the BRICS, with reportedly more than forty recently expressing an interest in membership.[48] This is likely due to the South's frustration over deteriorating domestic growth and trading conditions, and the perception that the BRICS' growing global influence represents a 'coming-of-age' for the South and a genuine alternative to perceived US hegemony. This narrative has now begun to act as a powerful legitimising tool for recruitment. To tap this potential, the BRICS, at its October 2024 Kazan, Russia, summit, introduced an intermediate 'partnership' status, with qualified privileges, as a stepping stone to full membership.[49] At Kazan, thirteen countries were invited to become BRICS partners, with nine – Belarus, Bolivia, Kazakhstan, Cuba, Malaysia, Thailand, Uganda, Uzbekistan,

[42]Robert D. Blackwill, 'China's strategy for Asia: Maximise power, replace America', *National Interest* (26 May 2016). https://nationalinterest.org/feature/chinas-strategy-asia-maximize-power-replace-america-16359

[43]Victor Cha, 'Examining China's coercive economic tactics', *CSIS* (10 May 2023), available at: {https://www.csis.org/analysis/examining-chinas-coercive-economic-tactics}.

[44]Jinping Xi, 'New Asian security concept for new progress in security operation', *Ministry of Foreign Affairs* (PRC) (2014), available at: https://www.mfa.gov.cn/eng/xw/zyjh/202405/t20240530_11340721.html

[45]Mariel Ferragamo, 'What is the BRICS group and why is it expanding?', *Council on Foreign Relations* (12 December 2024), available at: {https://www.cfr.org/backgrounders/what-brics-group-and-why-it-expanding}.

[46]Ben Norton, 'BRICS grows, inviting 13 new "partner countries" at historic summit in Kazan, Russia', *Geopolitical Economy* (26 October 2024), available at: {https://geopoliticaleconomy.com/2024/10/26/brics-13-partner-countries-summit-kazan-russia/}.

[47]Stewart Patrick et al., 'BRICS expansion and the future of world order: Perspectives from member states, partners, and aspirants', *Carnegie Endowment for International Peace* (31 March 2025), available at: {https://carnegieendowment.org/research/2025/03/brics-expansion-and-the-future-of-world-order-perspectives-from-member-states-partners-and-aspirants}.

[48]Mihaela Papa, 'The magnetic pull of BRICS', *Africa Policy Research Institute* (3 December 2024), available at: {https://afripoli.org/the-magnetic-pull-of-brics}.

[49]Norton, 'BRICS grows'.

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and Nigeria – accepting and officially becoming BRICS partner countries on 1 January 2025.[50] BRICS expansion has been welcomed by the existing membership, signalling that the BRICS anti-Western message is gaining traction across the 'South' countries. These states are increasingly frustrated by deteriorating domestic growth and trading conditions, and the BRICS is viewed as an ideologically heterogeneous entity and a counter-hegemony to the West's tainted imperialist legacy, its lack of economic engagement, and constant hectoring on human rights violations. The BRICS is also increasingly viewed as a forum where, individually and collectively, the South's voice can be heard, unlike the G20, where debate is dominated by the major Western powers.

China is at the helm of the formidable assembly of BRICS nations. It is perhaps no coincidence, therefore, that the additional five new member states all have strong economic and, in some cases, military ties with China. Moreover, this process of consolidation goes beyond trade, embracing also strategic considerations potentially influencing the possibility of future 'reverse' economic warfare, including trading sanctions, directed against the West. This threat is real, given the enlarged BRICS dominance of strategic minerals supply.[51] In the critical minerals sector, the enhanced BRICS control 75 per cent of the world's manganese, 50 per cent of its graphite, 28 per cent of its nickel, and 10 per cent of its copper, excluding Iran's reserves.[52] China, alone, is the largest producer of many of the world's critical minerals, producing in 2023 over 98 per cent of the world's gallium, 88 per cent of its magnesium, and 80 per cent of its tungsten.[53] Significantly, Beijing is not reticent about imposing economic sanctions against powerful Western nations. For example, in 2010, it threatened to ban the export of critical minerals to Japan, following the latter's detention of a Chinese fishing vessel,[54] and in 2023, it stopped the export of gallium, germanium, and graphite to the US.[55] Then, in February 2025, China announced it would restrict exports to the US of five critical minerals, namely, tungsten, tellurium, bismuth, indium, and molybdenum; and again, in April 2025, it banned dysprosium and yttrium, with these restrictions severely impacting renewable energy and defence industrial output.[56] Other BRICS members actively engage in critical mineral export restrictions, including, as of 2021, Russia with seventeen restrictions, India thirty-two, South Africa fourteen, and Brazil seven.[57]

The January 2025 BRICS enlargement added considerably to the grouping's diplomatic and economic strength, with World Economic Forum data demonstrating that the BRICS ten-member and nine partner states accounted for 55 per cent of the world's population and 46 per cent of global GDP.[58] In 2024, the BRICS economic growth averaged around 4 per cent compared to barely 1 per cent for G7 countries.[59] By 2026, the BRICS share of world trade is expected to surpass that of the G7.[60] This divergent growth trajectory is likely to continue, given that the BRICS comprise five of

[50]Norton, 'BRICS grows'.

[51]Vlado Vivoda, Ron Matthews, and Neil McGregor, 'A critical minerals perspective on the emergence of geopolitical trade blocs', *Resources Policy*, 89, 104587 (2024) https://doi.org/10.1016/j.resourpol.2023.104587.

[52]Gracelin Baskaran and Ben Cahill, 'Six new BRICS: Implications for energy trade', *CSIS* (25 August 2023), available at: {https://www.csis.org/analysis/six-new-brics-implications-energy-trade}.

[53]'Production share of critical minerals worldwide as of 2023, by majority producing country'. *Statista* (2024), available at: {https://www.statista.com/statistics/1127203/critical-minerals-production-share-by-majority-producing-countries-global/#:~:text=Critical%20minerals%20can%20be%20defined%20as%20minerals%20that,magnesium%2C%20and%2080.8%20percent%20of%20tungsten%20in%202023}..

[54]Keith Bradsher, 'Amid tension, China blocks vital exports to Japan', *New York Times* (22 September 2010), available at: {https://www.nytimes.com/2010/09/23/business/global/23rare.html}.

[55]Lily Kuo, 'The next front in the tech war with China: Graphite (and clean energy)', *Washington Post* (29 November 2023), available at: {https://www.washingtonpost.com/world/2023/11/29/china-critical-minerals-graphite-trade-united-states/} .

[56]'China announces export controls on five critical minerals' (12 February 2025), available at: {https://www.exiger.com/perspectives/critical-minerals-export-controls/}.

[57]Baskaran and Cahill, 'Six new BRICS'.

[58]Hans-Dieter Holtzmann and Akim der Voort, 'BRICS – What are the key issues for 2025?', *Friedrich Naumann Foundation* (28 January 2025).

[59]Ibid.

[60]Ebtesam Al-Kebi, 'The UAE's BRICS membership: A growing role for the global South', *Valdai Discussion Club* (6 February 2024), available at: {https://valdaiclub.com/a/highlights/the-uae-s-brics-membership/}.

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the African continent's largest economies as well as major economies in Central and Southeastern Asia. Moreover, it is predicted that in ten to fifteen years, China will become the world's leading economic power, India will be third, Indonesia fifth, and partners Malaysia, Nigeria, and Thailand will move up into the top twenty.[61] Additionally, Africa's new entrant, Ethiopia, along with existing member South Africa, will afford the BRICS increased economic and diplomatic exposure to the resource-rich African continent. Indonesia has also recently been active in expanding its influence on the African continent through the signing of five bilateral critical mineral agreements with African states, the most recent with Tanzania in 2024.[62] Indeed, it is in the energy and critical minerals sectors where the future power dynamics of the enlarged BRICS will likely manifest itself, furthering China's strategic ambitions of constructing a China-centric African network of markets and institutions.

Africa, a stopping point on Beijing's Belt and Road 'highway'

The second element of China's geoeconomic statecraft is the BRI. Xi launched this investment body in late 2013, and it has since become the policy vehicle for disbursing a remarkable US$1 trillion in loans and other development funds to nearly 150 countries,[63] touching 50 per cent of the world's population and a quarter of its GDP.[64] The BRI's primary purpose is to facilitate China's push for enhanced national security by drawing countries and regions into its sphere of diplomatic and economic influence through unbridled expansion of overseas investment. It is an investment strategy that courts controversy and attracts heated debate in the literature.[65] While most observers agree that the BRI offers generous assistance, there is widespread acceptance that it is not an aid programme, at least not in the conventional understanding of the term, but rather a contributory lever for promoting China's interests through geoeconomic diplomacy. This less-than-altruistic goal was highlighted in a November 2014 speech by Premier Xi when he argued that officials should 'advance the building of the Silk Road Economic Belt and the 21st Century Maritime Silk Road…(to)… protect China's overseas interests'.[66]

BRI funding has enhanced Africa's transport infrastructure, including the development of roads, ports, and railway networks, facilitating the transportation, whether by land or sea, of substantial quantities of ores to China. Chinese railway diplomacy and broader infrastructural investment that were once the central focus of China's 'Africa Policy' have now given way to a policy emphasis within the BRI on critical minerals. Yet, this does not mean that China has abandoned infrastructural investment; rather, it is viewed as complementing access to critical minerals operations in Africa. In January 2024, for example, Chinese companies pledged up to US$7 billion in infrastructure investment to support a copper and cobalt joint venture in the DRC.[67] The enormity of financial

[61]'Beyond Scepticism: Understanding the Role of Brics + in Global Progress', *The Intel Drop* (20 January 2025). Beyond Scepticism: Understanding the Role of Brics+ in Global Progress - THE INTEL DROP

[62]Pia Beuter, Rajneesh Bhuee, Lil Gabadadze, Amandine Gnanguênon, and Judy Hofmeyr, Mapping Africa's Green Mineral Partnerships, *APRI* (20 January 2025), available at {https://afripoli.org/uploads/reports/2025/1/APRI_Mapping_Africa_Green_Mineral_Partnerships.pdf}.

[63]Christoph Nedopil Wang, *Brief: China Belt and Road Initiative (BRI) Investment report H1 2022*, Green Finance and Development Center, available at: {https://greenfdc.org/china-belt-and-road-initiative-briinvestment-report-h1-2022/}, accessed 24 July 2022.

[64]Frank Umbach, 'How China's Belt and Road Initiative is faring', *GIS Report*, available at: {https://www.gisreportsonline.com/r/belt-road-initiative/}, accessed 8 April 2022.

[65]Michael Clark, 'Why is there so much furore over China's Belt and Road Initiative?', *The Conversation*, available at: {https://theconversation.com/why-is-there-so-much-furore-over-chinas-belt-and-road-initiative-139461}, accessed 29 May 2020; Tom Hancock, 'China encircles the world with One Belt, One Road strategy', *Financial Times* (4 May 2017).

[66]Jinping Xi, 'The central conference on work relating to foreign affairs held in Beijing', *China's Diplomacy,* available at: {http://en.chinadiplomacy.org.cn/2021-01/27/content_77158756.shtml}, accessed 28 November 2014.

[67]'Chinese companies to invest up to $7 billion in Congo mining infrastructure', *Reuters* (27 January 2024), available at: {https://www.reuters.com/markets/commodities/chinese-invest-up-7-bln-congo-mining-infrastructure-statement-2024-01-27/}.

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resources underpinning the construction of these belts and roads is not in dispute, but their proclivity to encourage, and sometimes ensnare, developing countries into taking on high levels of indebtedness is what makes this investment vehicle so controversial. For example, between 2000 and 2017, Chinese state-owned banks, private financial institutions, and companies had extended substantial loans to support mining projects in African countries.[68] As of October 2021, Chinese banks made up about one-fifth of all lending to Africa – concentrated in strategic or resource-rich countries, including Angola, Djibouti, Ethiopia, Kenya, and Zambia.[69] In the early 2020s, the five largest Chinese mining corporations with interests in cobalt and copper in the DRC had access to credit lines from Chinese state banks totalling a remarkable US$124 billion.[70]

China's BRI strategy has attracted criticism, however, due, firstly, to its alleged avoidance of fiscal, legal, and macroeconomic obligations. Globally, 89 per cent of BRI projects use Chinese contractors, which unflatteringly looks like a 'win–win' deal for them rather than a gain-sharing of economic rewards with African economies.[71] Secondly, there are concerns over the long-term African ownership of Chinese-sponsored projects, given the likely unsustainability of debt levels, and China opportunistically taking control and ultimately ownership of the newly invested facilities. Such an outcome came close to happening in Africa when, in 2020, Zambia defaulted on its loan repayments, highlighting concerns about Chinese 'debt-trap diplomacy'.[72] Thirdly, there are concerns that China and Russia are coopting BRICS as a geostrategic tool to advance their strategic interests, as evidenced by the January 2026 Chinese-led 'Will for Peace' maritime exercises with Russia, South Africa, and Iranian naval forces off the coast of South Africa.[73]

Infrastructure for minerals – a uniquely Chinese counter-trade paradigm

China's ability to thread arms exports into its geoeconomic model represents the third dimension of China's foreign policy forays into Africa, with the common objective of seeking to dominate the global supply of strategic resources. Here, the enabling lever facilitating Africa's appetite for Chinese projects is barter – an unorthodox 'non-monetarised' counter-trading mechanism.[74] Barter is employed to draw African states into Beijing's sphere of strategic influence by easing the financial pain of investment via the exchange of commodities, such as oil, mining, and/or manufacturing rights, rather than scarce foreign currencies. Barter's trade tentacles are enmeshed in China's going out strategy, targeting the linkage between overseas investment and its trade in commodities and minerals.[75] For instance, Ghana, suffering foreign exchange and public debt crises, used oil shipments to pay a Chinese corporation for the cost of constructing its energy infrastructure, as further

[68]Robert Bociaga, 'Minerals and China's military assistance in the DR Congo', *The Diplomat* (31 October 2022), available at: {https://thediplomat.com/2022/10/minerals-and-chinas-military-assistance-in-the-dr-congo/}.

[69]Ariel Cohen, 'China and Russia make critical mineral grabs in Africa while the U.S. snoozes', *Forbes* (17 January 2022), available at: {https://www.forbes.com/sites/arielcohen/2022/01/13/china-and-russia-make-critical-mineral-grabs-in-africa-while-the-us-snoozes/}.

[70]Bociaga, 'Minerals and China's military assistance in the DR Congo'.

[71]Jonathan E. Hillman, 'China's Belt and Road Initiative: Five years later', *CSIS*, available at: {https://www.csis.org/analysis/chinas-belt-and-road-initiative-five-years-later}, accessed 25 January 2018.

[72]Evan Hsiang, 'Chinese investment in Africa: A reexamination of the Zambian Debt Crisis', *Harvard International Review* (25 January 2023), available at: {https://hir.harvard.edu/chinese-investment-in-africa-a-reexamination-of-the-zambian-debt-crisis/}, accessed 25 January 2023.

[73]Sarah Lesedi, 'Will for Peace 2026: BRICS+ Navies expand maritime "cooperation"', *Military Africa* (25 January 2026), available at: {https://www.military.africa/2026/01/will-for-peace-2026-brics-navies-expand-maritime-cooperation/}.

[74]Ron Matthews and Jonata Anicetti, 'The role of defence countertrade in Chinese geoeconomic diplomacy', *Journal of Strategic Studies, Vol. 47(5)* (2024), 612–642. available at: {https://www.tandfonline.com/doi/full/10.1080/01402390.2024.2327842}

[75]China's use of barter is a prominent feature of its commercial as well as its arms trade. For example, China engages in railway diplomacy across the globe, with financing often through barter arrangements. China's 2013 high-speed railway investments in Thailand were paid through shipments of one million tonnes of rice and 200,000 tonnes of rubber. See CTO, 'Thailand to open bidding for railway projects', *CTO Newsletter*, 31:21 (2013), p. 7.

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loans would have breached IMF debt levels.[76] Similarly, Nigeria signed an MoU with China for the transfer of skills and technologies to modernise its extractive industries in exchange for access to raw materials.[77]

China also employs barter to leverage arms exports, not only to make the sale but also as a means of achieving influence through the creation of 'client' states. The success of this approach depends on the relative attractiveness of Chinese arms, but this is incontestable, as according to SIPRI, as many as twenty-one countries in sub-Saharan Africa received large deliveries of Chinese arms between 2019 and 2023.[78] China's arms export success is due to several factors. Foremost amongst them is that while Chinese arms are basic, they are also competitive, with relatively low prices. This is a core element in the decision to buy for poor African countries, possessing non-convertible currencies and limited foreign exchange reserves and facing a strategic environment characterised by low-level military technology threats. Another appealing aspect is that China adopts a non-interventionist approach to its military sales. Controversial issues, such as the procuring state's political, military, and human rights record, are not brought to the negotiating table. China exerts zero leverage in this regard, which acts to strengthen the bonds of partnership, and, for the African customer state, weakens its sense of dependency and strategic vulnerability with respect to arms embargoes. Additionally, Chinese arms transfers are not encumbered with onerous restrictions associated with US International Traffic in Arms Regulations (ITAR).

Beijing has traditionally sold arms to African countries, which possess abundant natural resources, typically sweetening basic weapons deals with attractive credit arrangements, military cooperation, and officer training to incentivise closer diplomatic relations.[79] An early example of this barter strategy can be found in Africa's 2004–6 Darfur conflict, in which China supplied around 90 per cent of Sudan's imports of small arms and light weapons in exchange for access to the country's oil.[80] Around the same time, Zimbabwe had reportedly granted Norinco mining rights to platinum, gold, and copper at several Zimbabwean sites in exchange for military equipment.[81] China's use of barter can also be creative and non-conventional, such as when Zimbabwe was allowed to ship a menagerie of safari animals, including thirty-five elephant calves, eight lions, a dozen hyenas, and a giraffe, to a Chinese wildlife park to clear a debt for military boots and uniforms.[82] Moreover, in a twist to conventional counter-trade practices, there are cases where Chinese arms exports may be the result rather than the trigger of trading activities. This was aptly demonstrated in 2022 when two Chinese gold miners were killed in an ambush by Congolese army colonels, with China's response being to offer security assistance to Chinese companies as well as the training of local military personnel in the use of Chinese weapons.[83]

Russian mercenaries on the frontline of securing Africa's critical minerals

China is not the only non-Western power looking to tap into Africa's strategic resources – Russia also has its sights set on the continent, even though it operates from a much smaller economic base. Less than 1 per cent of Russia's FDI goes to Africa,[84] and its total trade with the continent,

[76] CTO, 'Ghana has entered a creative trade finance arrangement with SINOPEC', *CTO Newsletter*, 32:9 (2014), p. 8.

[77] CTO, 'Will source raw material from Nigeria in exchange for technology', *CTO Newsletter*, 31:10 (2013), p. 8.

[78] 'Arms for Africa: How Chinese weapons firms are taking over Africa's market', *Economist* (25 May 2024).

[79] Ibid.

[80] '90% of the weapons for Darfur come from China', *Asia News*, available at: {https://www.asianews.it/news-en/90-of-the-weapons-for-Darfur-come-from-China-11773.html}, accessed 14 March 2008.

[81] Mathew Nyaungwa, 'China in diamonds for weapons barter trade with Zimbabwe – report', *Rough Polished Analytical Agency*, available at: {https://www.rough-polished.com/en/news/38992.html}, accessed 14 May 2010.

[82] CTO, 'Zimbabwe sends elephants, lions, hyenas and a giraffe to settle Congo's debt to China', *CTO Newsletter*, 35:1 (2017), p. 7.

[83] Bociaga, 'Minerals and China's military assistance in the DR Congo'

[84] Mathieu Droin and Tina Dolbaia, 'Russia is still progressing in Africa. What's the limit?', *CSIS* (15 August 2023), available at: {https://www.csis.org/analysis/russia-still-progressing-africa-whats-limit}. Accessed April 25 2026.

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at US$18 billion, is well behind that of both the US (US$64 billion) and China (US$254 billion).[85] Many of Russia's African client states have military, autocratic, and undemocratic governments subject to Western sanctions, which Russia sidesteps by forging strategic geoeconomic partnerships and investment deals. These so-called regime survival packages enable Russia to offer military and security assistance to struggling African governments as a *quid pro quo* for mineral resource concessions to Russian companies.[86] Although Russia's only 'official' military presence in Africa is limited to the establishment of a naval port in Sudan, it does pose a looming threat to the West through several longer-term strategic objectives. These include gaining naval access to the Red and Mediterranean Seas, displacing Western influence, mitigating Russia's international isolation, and advancing Moscow's claim to be a great power in Africa. Moreover, Moscow views the provision of 'unofficial' military and logistical proxy forces across the continent as a means of securing access to critical mineral supply chains.[87]

Deployment of these proxy forces is via Russia's private military contractors (PMCs), which are tasked with propping up autocratic governments and securing commercial cooperation opportunities with African client states. Russia uses PMCs as an element within what has been termed 'memory diplomacy', designed to exploit lingering anti-colonial sentiment via disinformation campaigns to discredit pro-Western forces.[88] While PMCs do engage in combat and are ultimately under Russia's control, they are ostensibly independent of its formal military forces. Hence, PMCs offer the Kremlin both flexibility and deniability, as they are technically illegal under Russian law, allowing Moscow to deny any connection with their activities.[89] As private companies, they cost the Russian treasury nothing, which in recent years has been important, given that the Kremlin is strapped for resources in its costly war against Ukraine, and any loss of life in Africa is not reported publicly.[90] However, these Russian mercenary activities are widely linked to human rights abuses, and critics argue that they worsen existing civil conflicts.[91] Moreover, even though limited in number, Russian companies are actively involved in the extraction of African minerals. Russian commercial entities are presently engaged in thirty-six major African projects, including fourteen mines, concentrated in Central and Southern Africa, and nine hydrocarbon projects, mostly in North Africa.[92] The three principal Russian-owned companies are Rosneft, Tatneft, and Gazprom, and all have major projects in Libya, with a fourth company, Rosatom, owning six nuclear power projects across Egypt, Sudan, Ethiopia, Tanzania, Zambia, and South Africa.[93]

There is no evidence to suggest that the Kremlin has a grand plan for Africa, equivalent to that of China's grand strategy, but there have been significant numbers of Kremlin-inspired PMC interventions since 2005. The precise number is difficult to estimate, but reportedly, there have been at least seven Russian PMCs that have carried out a minimum thirty-four operations in sixteen

[85]Mariel Ferragamo, 'Russia's growing footprint in Africa', *Council on Foreign Relations* (28 December 2023), available at: {https://www.cfr.org/backgrounders/russias-growing-footprint-africa}.

[86]Ben Farmer and Roland Oliphant, 'Putin sells African leaders "regime survival packages" to win influence, Think Tank Says', *The Telegraph*, available at: {https://www.telegraph.co.uk/news/2024/02/20/putin-wagner-mercenaries-regime-survival-package-africa/}, accessed 20 February 2024.

[87]Ferragamo, 'Russia's growing footprint in Africa'.

[88]Ibid.

[89]Brian Katz, Seth G. Jones, Catrina Doxsee, and Nicholas Harrington, 'Moscow's mercenary wars – the expansion of Russian military companies', *CSIS* (September 2020), available at: {https://russianpmcs.csis.org/}.

[90]Paul Stronski, 'Implausible deniability: Russia's private military companies', Carnegie Endowment for International Peace (2 June 2020), available at: {https://carnegieendowment.org/posts/2020/06/implausible-deniability-russias-private-military-companies}.

[91]John F. Clark, 'Wagner Group mercenaries in Africa: Why hasn't there been any effective opposition to drive them out', *The Conversation* (26 June 2023).

[92]'Russia's Growing Presence in Africa: A Geostrategic Investment', *Rand* (u/d): https://www.rand.org/pubs/research_reports/RR4399.html?

[93]Ibid.

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African countries.[94] The first major contractual PMC operation occurred in 2017 with the Libyan Cement Company, and a year later, the notorious paramilitary Wagner Group was involved in an important military cooperation agreement with the Central African Republic (CAR).[95] Wagner's involvement in this African state is a textbook case of PMC operations, with the group arriving in 2018 to push back rebels from the capital, Bangui, and shortly thereafter, the CAR issued gold and diamond mining licences to a Russian-owned company connected to the Wagner Group.[96] In addition to opaque gold mining and smuggling ventures in the CAR, Wagner operated in Mali, Sudan, and elsewhere, conducting nefarious activities that have sown conflict, leading to the imposition of US sanctions on the Group.[97] In 2023, Wagner helped Mali retake rebel-held areas in the north, and shortly thereafter, Russia and Mali signed agreements on gold refining,[98] as well as oil, gas, uranium, and lithium production.[99]

The early 2024 death of the Wagner Group leader, Yevgeniy Prigozhin, led to its consolidation and rebranding into the so-called Africa Corps.[100] Although this new entity is more transparent and less murky than its predecessor, it is still directed by the Russian Defence Ministry, managed by the military intelligence agency (GRU), and overseen by the Kremlin.[101] The Africa Corps deals directly with African governments on a state-to-state basis, and operations are less *ad hoc* and more geostrategic.[102] For example, a contingent of Africa Corps personnel arrived in Burkina Faso in January 2024 to 'ensure the safety of the country's leader Ibrahim Traore and the Burkinabe people'.[103] Two months later, Burkina Faso's minister of energy, mining, and quarries stated that Russian companies can become 'strategic partners' in the extraction of minerals – such as gold, zinc, manganese, copper, graphite, and lithium – from mines and quarries.[104] Thus, the characterisation of the Africa Corps as PMCs replicates Russia's narrative for such paramilitaries, including the fomenting of coups in the Sahel and the immediate recognition of emergent military juntas, as part of Russia's strategic engagement to poison Africa's relationship with the West. This agitation, rather than Western withdrawal, has contributed to subsequent Russian mineral deals and growing instability in the Sahel.

The search for geoeconomic power can sometimes override fraternal ideological relations, and thus, counter-intuitively, diplomatic friction and even military conflict between Russia and China

[94]Droin and Dolbaia, 'Russia is still progressing in Africa'.Wagner group mercenaries in Africa: why there hasn't been any effective opposition to drive them out (theconversation.com)

[95]Sergey Sukhankin, 'Chinese PSCs in sub-Saharan Africa: The cases of Francophone and Lusophone Africa', *The Jamestown Foundation* (6 June 2023), available at: {https://jamestown.org/chinese-pscs-in-sub-saharan-africa-the-cases-of-francophone-and-lusophone-africa/}. Ferragamo, 'Russia's growing footprint in Africa'.

[96]Pauline Bax, 'Russia's influence in the Central African Republic', *International Crisis Group* (3 December 2021), available at: {https://www.crisisgroup.org/cmt/africa/central-african-republic/russias-influence-central-african-republic}.

[97]Ellen Ioanes, 'Wagner's real money never came from diamonds and gold', *VOX*, available at: {https://www.vox.com/world-politics/2023/7/2/23781794/wagner-group-africa-russia-uae-putin}, accessed 3 July 2023.

[98]Tiemoko Diallo, 'Mali signs agreement with Russia to build gold refinery', *Reuters* (22 November 2023), available at: {https://www.reuters.com/markets/commodities/mali-signs-agreement-with-russia-build-gold-refinery-2023-11-22/}.

[99]Liam Karr and Matthew Gianitsos, 'Africa File, April 4, 2024: Mali and Russia explore Mali's mineral wealth; Niger plays the field; the Kremlin's Red Sea ambitions in Eritrea', *Critical Threats: Africa File* (4 April 2024), available at: {https://www.criticalthreats.org/analysis/africa-file-april-4-2024-mali-and-russia-explore-malis-mineral-wealth-niger-plays-the-field-the-kremlins-red-sea-ambitions-in-eritrea}.

[100]John A. Lechner, 'Is Africa Corps a rebranded Wagner Group?', *Foreign Policy* (7 February 2024), available at: {https://foreignpolicy.com/2024/02/07/africa-corps-wagner-group-russia-africa-burkina-faso/}.

[101]Alessandro Arduino, 'Wagner Group is now Africa Corps. What this means for Russia's operations on the continent', *The Conversation*, available at: {https://theconversation.com/wagner-group-is-now-africa-corps-what-this-means-for-russias-operations-on-the-continent-223253}, accessed 14 February 2024.

[102]Alexander Tripp, 'With Africa's minerals in demand, Russia and the US each offer what the other can't', *Atlantic Council* (1 May 2024), available at: {https://www.atlanticcouncil.org/blogs/africasource/with-africas-minerals-in-demand-russia-and-the-us-each-offer-what-the-other-cant/}.

[103]'Russian troops deploy to Burkina Faso', Reuters (25 January 2024), available at: {https://www.reuters.com/world/africa/russian-troops-deploy-burkina-faso-2024-01-25/}.

[104]Tripp, 'With Africa's minerals in demand'.

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have become increasingly possible as both powers seek to dominate Africa's resource space. Russia does engage in combat operations via the deployment of PMCs, but Chinese troops stationed in Africa are solely deployed on peacekeeping duties. Indeed, China contributes more money and personnel to UN operations than any other permanent member of the Security Council, enabling it to influence international politics and diplomacy.[105] By 2021, China had contributed more than 50,000 personnel to twenty-nine former and ongoing peacekeeping operations.[106] Significantly, Beijing focuses its peacekeeping efforts in Africa, with some 80 per cent of all Chinese peacekeepers deployed on the continent since China first participated in UN operations in 1990.[107] China's People's Liberation Forces (PLA), however, are deliberately kept out of Africa's numerous crises to legitimise Beijing's non-interference policy. Yet, while Russia and China are agnostic on the internal politics of client states, they are not ambivalent to each other's operations. Of course, the Russians and Chinese share a common desire to edge out Western influence, but their strategic relations in Africa are fluid. China's Private Security Companies (PSCs), equivalent to Russia's PMCs,[108] have protected Beijing's investments in Africa over the past decade or so. Additionally, they have been used to address rising Sinophobia in Francophone and Lusophone states,[109] as reflected by the murder of increasing numbers of Chinese workers. Yet, while both Beijing and Moscow have the common aim of promoting anti-Western sentiment, this masks Sino–Russian competitive and diplomatic frictions: namely, the control of African resources through China's emphasis on stability versus Russia's contrasting focus on fomenting instability, potentially becoming a fault line between the two countries.[110] In fact, serious frictions between the two superpowers have already surfaced, as demonstrated by a 2023 incident in which the Wagner Group was allegedly responsible for the deaths of nine Chinese nationals at a CAR mine.[111]

From blood diamonds to blood gold and other minerals

Aside from external Sino–Russian interventionism, mineral-rich sub-Saharan states face serious destabilising 'internal' threats. For over three decades, the continent's natural resources have been plundered by unscrupulous local African criminal gangs and rebel groups. Conflicts, such as the 1990s 'blood diamond' wars in Sierra Leone and Liberia, attracted global attention, but the pillaging of critical minerals by African non-state actors is an ongoing phenomenon largely ignored by the world's media. Islamist insurgency groups are also endemic across the continent. For example, Al Qaeda–linked insurgents have escalated activity in Mali, providing Russia's PMCs with an excuse to expand operations. Moreover, several of the recent coups in Africa were predicated on militaries seizing control of governments to more effectively counter Islamist terrorist groups encroaching on their territory. Yet, while the resultant political instability has made relationship-building in Africa difficult for the West, especially amid regime changes and physical threats to the mining infrastructure,[112] paradoxically, they have created opportunities for Russian PMCs to join forces with national militaries and gain influence with local governments. For example, after the withdrawal

[105]Bociaga, 'Minerals and China's military assistance in the DR Congo'.

[106]Claude A. Lambert, 'Small eagle, big dragon: China's expanding role in UN peacekeeping', *RUSI* (19 July 2024), available at: {https://www.rusi.org/explore-our-research/publications/commentary/small-eagle-big-dragon-chinas-expanding-role-un-peacekeeping}.

[107]'Over 80% of Chinese peacekeepers deployed in Africa: White paper', *SCIO – State Council Information Office* – The People's Republic of China, available at: {http://english.scio.gov.cn/whitepapers/2021-11/26/content_77895291.htm}, accessed 26 November 2021.

[108]Sukhankin, 'Chinese PSCs in sub-Saharan Africa'.

[109]Lusophone states comprise the six Portuguese-speaking African countries.

[110]Ferragamo, 'Russia's growing footprint in Africa'.

[111]Kate Bartlett, 'China and Wagner in Africa: Friends or foes?' *VOA News* (10 August 2023), available at: {https://www.voanews.com/a/china-and-wagner-in-africa-friends-or-foes-/7219827.html}.

[112]Bradley Intelligence Report, 'Africa and the global race for critical minerals'.

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of French forces from Mali, the national military did not possess the capacity to protect the country's gold and uranium deposits from Salafi-jihadi insurgents,[113] but Wagner was on hand to assist. Although the group only had 1,000–2,000 mercenaries spread across the country, it supplemented its forces by coercing local pro-government militias to leverage these 'alliances of convenience' with local power brokers to acquire significant amounts of artisanal gold in Sudan.[114]

The DRC offers another example of an African state that, following the withdrawal of foreign forces, inherited a toxic mix of mineral wealth, violence, and corruption. Since independence from Belgium in 1960, UN investigating experts have reported high levels of mineral smuggling and conflicts[115] linked to the DRC's rich resource base. The DRC's eastern provinces are reportedly home to more than 250 local and fourteen foreign armed groups fighting for territory, mines, and other resources, with armed guards virtually enslaving hundreds of thousands of men, women, and children working in the artisanal mines.[116] The notorious M23 rebel movement, for instance, is allegedly backed by Rwanda and is at the heart of the criminality, reportedly committing atrocities against civilians.[117] The consequence of this enduring conflict is that the DRC's 100 million people live in a state that is simultaneously one of the most resource-rich but also corrupt, violent, and poverty-stricken by the UN countries in the world.[118] Yet, over decades of fighting, and many separate investigations and other investigative bodies, the DRC has continued to suffer from the smuggling of gold, coltan, cobalt, and other minerals from illegal mines into neighbouring countries for onward sale into global markets.[119]

The link between criminality and minerals, especially gold, is not isolated to Central Africa but is pervasive across the continent.[120] In West Africa, for instance, where artisanal and small-scale gold mining is common, there is a complex web of local actors, foreign supply chains, and criminal networks that link local mines to international trade hubs to exploit the gold sector for financial gain and power.[121] According to a recent independent report on 'blood gold', this exotic metal is closely intertwined with survival, money, power, and criminality.[122] The report focuses on the

[113]Liam Karr, Matthew Gianitsos, and Josie Von Fischer, 'Niger cuts the US; JNIM encroaches on Guinea; al Shabaab hotel attack', *Critical Threats: Africa File*, available at: {https://www.criticalthreats.org/analysis/africa-file-march-22-2024-niger-cuts-the-us-jnim-encroaches-on-guinea-al-shabaab-hotel-attack#Mali}, accessed 22 March 2024.

[114]Karr and Gianitsos, 'Africa File: Mali and Russia explore Mali's mineral wealth'.

[115]Michelle Nichols and Louis Charbonneau, 'Exclusive: Mineral traders in Rwanda helping fund Congo rebels – U.N. panel', *Reuters* (16 October 2012), available at: {https://www.reuters.com/article/world/exclusive-mineral-traders-in-rwanda-helping-fund-congo-rebels-u-n-panel-idUSBRE89F1LZ/}.

[116]Kate Hairsine, 'DR Congo conflict pulls in more players to tackle rebels', *DW,* available at: {https://www.dw.com/en/dr-congo-conflict-pulls-in-more-players-to-tackle-rebels/a-68304390}, accessed 20 February 2024.

[117]'DR Congo: Rwandan-backed M23 rebels perpetrating summary killings and rapes', *Amnesty International* (17 February 2023), available at: {https://www.amnesty.org/en/latest/news/2023/02/dr-congo-rwandan-backed-m23-rebels-perpetrating-summary-killings-and-rapes/}.

[118]James Rupert, 'In Congo, peace means a halt to "brutal, illegal mining"', *United States Institute of Peace*, available at: {https://www.usip.org/publications/2024/03/congo-peace-means-halt-brutal-illegal-mining}, accessed 7 March 2024.

[119]Lorraine Mallinder, '"Blood minerals": What are the hidden costs of the EU–Rwanda supply deal?' *Aljazeera*, available at: {https://www.aljazeera.com/features/2024/5/2/blood-minerals-what-are-the-hidden-costs-of-the-eu-rwanda-supply-deal}, accessed 2 May 2024.

[120]There is debate over whether gold is a critical mineral. All that glitters is not just cobalt and lithium; as a precious metal, gold plays a critical role in strengthening economic security, even though it is not included in the USGS list of critical minerals. Precious metals, such as gold, silver, and platinum, are pivotal in the development of advanced technologies driving the 'transition' process towards clean energy systems (see 'Precious metals vs critical minerals: Their roles in a sustainable future', *ESGold* [11 July 2024], available at: {https://esgold.com/precious-metals-vs-critical-minerals-their-roles-in-a-sustainable-future/}.). Moreover, gold is viewed as a 'pathfinder' element, often located proximate to other critical minerals, such as antimony, bismuth, tellurium, and tungsten (see Lesley, S. (December 30, 2020). Gold – A Pathfinder to Critical Minerals, Mining News. Gold – a pathfinder to critical minerals - North of 60 Mining NewsGold.

[121]'Beyond blood gold, conflict and criminality in West Africa', *Global Initiative*, available at: {https://globalinitiative.net/analysis/gold-conflict-criminality-west-africa/}, accessed 28 November 2022.

[122]Jessica Berlin, David Clement, Zoltan Kesz, and Elizabeth Hicks, *The Blood Gold Report* (December 2023), available at: {https://bloodgoldreport.com/wp-content/uploads/2023/12/The-Blood-Gold-Report-2023-December.pdf}.

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Wagner Group and its blood gold operations in the CAR, Sudan, and Mali. In each of these countries, Russia profited from the blood gold trade in different ways, including exclusive extractive rights in CAR in return for propping up the authoritarian regime, and in Sudan, where Wagner became the dominant buyer of unprocessed Sudanese gold, as well as a major smuggler of processed gold.[123] Strikingly, since Vladimir Putin's full-scale invasion of Ukraine in February 2022, 'the Kremlin has earned more than US$2.5bn from trade in African gold'.[124]

Battle lines drawn: Western responses to Sino–Russia's growing imprint on African critical mineral supply chains

The West's dominant 'corporate' presence in Africa's mining sector has been driven by free market economics and profit, not geoeconomic strategy. Yet, while US businesses may have been reluctant to invest in mineral and infrastructure projects because of conflict, political instability, and the risk of asset expropriation, at a broader level, the West has remained a major source of FDI, trade, development support, and security assistance in Africa for decades. However, there was no overarching government-driven geoeconomic strategy, and this contrasted markedly with the West's Sino–Russian counterparts. Washington's policy negligence over the importance of building ties with Africa through access to its mineral wealth began during the Cold War and accelerated thereafter through a process of 'benign neglect'.[125] Three other factors acted to constrain Western engagement. Firstly, history was against the West, with Sino–Russia touting their non-colonialist credentials as a means of obtaining preferential access to Africa's mineral supply chains. Secondly, the West sought to tie its investments to the promotion of human rights, environmental responsibility, and safety and governance standards. This model contrasts starkly with the unencumbered, non-interventionist, and 'no questions asked' foreign policy approach pursued by Beijing and Moscow. Thirdly, of equal if not greater importance, was China's leveraging of trade and financing, encouraging increased debt and dependence, and Russia's willingness to prop up military juntas to exploit opportunities for trade and political influence. Yet, while beneficiary African states receive loans and political endorsement, they also suffer economic and social costs, including negligible local added industrial value, lack of transparency and accountability, and minimal commitment to ethical, safety, and governance requirements. Thus, Sino–Russian interventionism essentially replicates the earlier Western neocolonial mercantilist model, based on exploitive extraction of Africa's mineral resources.

Building a more robust Africa-oriented engagement strategy

The existing divergent geoeconomic approach between China–Russia and the West is evidenced by the findings of a 2025 report authored by Beuter et al.,[126] offering two key insights into the evolving dynamics of resource diplomacy and the governance of critical mineral extraction. Firstly, the report underscores the prominent roles of global actors, such as China and Russia, exemplified by their sixteen bilateral critical mineral agreements with African states, in contrast to the relative scarcity of Western bilateral agreements – the US, for example, holding just two, and Australia and Canada none. Secondly, the nature of these agreements varies significantly, with China and Russia emphasising direct state cooperation and allocation of state funds, and Australia and Canada

[123]Ibid.

[124]Ibid.

[125]Priyal Singh, 'New problems, old problems', *IPS-Journal* (14 November 2024), available at: {https://www.ips-journal.eu/topics/foreign-and-security-policy/new-problems-old-problems-7917/}. If this is not correct, This neglect is illustrated by the fact that the United States holds twenty global free trade agreements, but only one with a nation on the African continent – Morocco; the latter possesses the world's largest known reserves of phosphates, but few other critical minerals (see Witney Schneidman, 'Africa's critical minerals could power America's green energy transition', *Foreign Policy* (3 August 2023), available at: {https://foreignpolicy.com/2023/08/03/africa-minerals-biden-ira-green-energy-agoa/}.

[126]Beuter et al., *Mapping Africa's Green Mineral Partnerships*.

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fostering an enabling environment for private sector investment that prioritises the inclusion of environmental, social, and governance (ESG) standards, albeit carrying the potential downside of slower and more costly project execution.[127] Crucially, then, if the US and its allies wish to differentiate themselves from Chinese competition, then they will need to lead with their values and form partnerships with African countries, prioritising economic feasibility, environmental sustainability, and ethical conduct – values central to an 'E3' model; and the only way to do this will be by driving innovation along the critical minerals supply chain, specifically in processing and refining.[128]

A coordinated Western policy approach is therefore required to address the range of destabilising factors that Sino–Russian engagement has conveniently ignored. The West needs to work with its corporate entities and African governments to tackle the dark side of energy transition,[129] including eradicating the factors contributing to instability, such as criminal gangs, terrorist organisations, and pervasive corruption; environmental problems, such as the local pollution of soil, air, and water, the disposal of toxic residuals, and wasteful use of water and energy;[130] work and safety risks; and child labour and sexual abuse.[131] Harmonious government-level partnerships are needed to stabilise joint economic endeavours by removing investment risk and uncertainty from abrupt changes in African economic and trade policies, such as 'resource nationalism' (sometimes referred to as the obsolescing bargain), whereby governments suddenly take over mines or mining companies and impose commodity export bans.[132] Indeed, most of the thirty-two sub-Saharan WTO member states have now imposed commodity export bans,[133] and critical mineral export restrictions have begun to appear, including Zimbabwe's 2022 export ban on raw lithium and Namibia's 2023 embargo on critical minerals.[134] Genuine African governance is essential for creating the long-term, transparent, mutually beneficial relationships that are required to realise win–win outcomes from critical mineral investments. This would then focus Western investments in African countries to be supportive of these arrangements. It needs to be recognised that the natural resource curse in Africa is highly governance-driven, and China and Russia are not filling an 'investment void'; rather, they are cutting opaque deals with unaccountable African leaders that act to entrench these leaders while contributing to greater corruption, inequality, and instability in these countries.[135]

Additionally, in response to Sino–Russian incursions into Africa's mineral sectors, the US and other Western players have recently worked hard to strengthen relations with Africa through a series of 'offensive' policy initiatives. The aim is to encourage Africa's movement away from the exploitive raw material 'pit-to-port' business model and instead support it to pivot towards becoming a high-value global production hub in critical minerals. Indeed, a US–Africa Summit was recently held, championing membership of the African Union (AU) in the Group of Twenty (G20), with Washington pledging to provide the continent with US$55 billion in aid and investments

[127]Ibid.

[128]Chris Moorman, 'The US won't gain a lead in the competition for Africa's critical minerals without innovation', *Atlantic Council* (26 November 2024), available at: {https://www.atlanticcouncil.org/blogs/africasource/the-us-wont-gain-a-lead-in-the-competition-for-africas-critical-minerals-without-innovation/}.

[129]A. Marin and D. Goya, 'Mining – the dark side of the energy transition', *Environmental Innovation and Societal Transitions*, 41 (2021)86–88. https://doi.org/10.1016/j.eist.2021.09.011.

[130]IEA, 'The role of critical minerals in clean energy transitions'.

[131]Benjamin K. Sovacool, 'Who are the victims of low-carbon transitions? Towards a political ecology of climate change mitigation', *Energy Research & Social Science*, 1–16 73 (2021).

[132]James Musonda and Miles Larmer, 'Resource nationalism and political change: Mine nationalisation and the 2021 Zambian Election', *Journal of Southern African Studies*, 49(3) (31 October 2023) 397–414.

[133]Nicolai Schulz, 'Export bans in Africa are more political than economic', LSE (20 March 2020), available at: {https://blogs.lse.ac.uk/africaatlse/2020/03/20/export-bans-in-africa-highly-political-commodities/}.

[134]'Zimbabwe bans raw lithium exports to curb artisanal mining', *Reuters* (20 December 2022), available at: {https://www.reuters.com/world/africa/zimbabwe-bans-raw-lithium-exports-curb-artisanal-mining-2022-12-21/}, accessed 21 December 2022; L. Butt and I. M. N Wangoto (n.d.), 'Namibia's Mineral Export Ban', *London Politica*. Namibia's Mineral Export Ban — London Politica

[135]We are indebted to an anonymous reviewer for highlighting this point.

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across 2022–5; this represents a significant step up from the US average of less than US$8 billion annually over the past decade.[136] In 2022, the US-led Mineral Security Partnership (MSP) was launched as a 'friendshoring' effort, enabling Western-friendly nations to secure access to non-Chinese sources of essential metals crucial for military applications and clean energy infrastructure. Yet, disappointingly, by 2024, only two African states, Namibia and the DRC, had been invited to become members of the advisory MSP Forum, and none for the MSP proper.[137]

Increased US willingness to release largesse clearly represents progress in recognising the important nexus between Africa and access to critical minerals, but it is not simply a matter of quantum. Compared to China's more strategic diplomatic, investment, and military approach, as well as its use of state-directed Chinese companies, US geoeconomic efforts look *ad hoc* and uncoordinated. An example of US policy incoherence and contrariness was the 2022 Inflation Reduction Act tax credit, which, perversely, limits US ability to engage with key African nations in a way that is mutually beneficial.[138] Since taking office in January 2025, President Donald Trump has adopted a more aggressive and divisive approach towards accessing global critical mineral supply chains. The President's rhetoric aligns with his 'America First' mantra and includes US control of mineral-rich Greenland and the brokerage of a minerals deal with Ukraine. The Trump administration is also likely to be keen on strengthening US critical minerals supply security with resource-rich African countries. For example, Washington has begun exploratory discussions with the DRC in a deal that would enhance access to the African country's critical minerals in exchange for political support of President Félix Tshisekedi, thus providing a counterweight to China's influence in the country.[139] Other diplomatic and economic interventions will likely follow, opening opportunities to leverage mutually beneficial trade and investment relationships and spur reauthorisation of trade preference programmes, including the African Growth and Opportunity Act and the Generalized System of Preferences.[140]

In parallel with these US initiatives, the Europeans have been active in cultivating their links with Africa. The emerging Africa–Europe partnership has assisted Europe in becoming Africa's biggest trading partner, its principal provider of development assistance, and a leading foreign direct investor, contributing to the emergence of eleven African states joining the ranks of the world's twenty fastest-growing economies and making the continent the second-fastest-growing region after Asia.[141] Much of Europe's focus has been directed towards Africa's mineral-rich states. In 2021, for instance, the EU unveiled its Global Gateway Strategy, as not only a riposte to China's BRI but also a critical mineral diplomacy model to support European public and private financing aimed at

[136]Alexis Arieff, Lauren Ploch Blanchard, and Nicolas Cook, 'U.S. assistance for sub-Saharan Africa: An overview', *CRS* [Congressional Research Service] Report (7 November 2023), available at: {https://www.congress.gov/crs-product/R46368}.

[137]USIP Senior Study Group on Critical Minerals in Africa, *Critical Minerals in Africa: Strengthening Security, Supporting Development, and Reducing Conflict amid Geopolitical Competition*, USIP [United States Institute of Peace] (April 2024), available at: {https://www.usip.org/publications/2024/04/critical-minerals-africa-strengthening-security-supporting-development-and}, accessed 9 April 2024; 'Statement on the first high-level minerals security partnership forum event', EU Commission, available at: {https://www.usip.org/sites/default/files/2024-04/critical-minerals-africa-senior-study-group-final-report.pdf?}, accessed 18 July 2024.

[138]One of the Act's key provisions is a tax credit available to American consumers purchasing electric vehicles whose batteries contain a certain percentage of critical minerals extracted or processed in the United States or any country 'with which the United States has a free trade agreement.' See Schneidman, 'Africa's critical minerals could power America's green energy transition'.

[139]L. Hook, W. Wallis, and J. Politi, 'US in exploratory talks with DR Congo over mineral deal', *Financial Times* (8 March 2025).

[140]Zainab Usman, 'The six areas in Trump's executive orders that countries in Africa and the global South should pay attention to', *Carnegie Endowment for International Peace* (12 February 2025), available at: {https://carnegieendowment.org/research/2025/02/the-six-areas-in-trumps-executive-orders-that-countries-in-africa-and-the-global-south-should-pay-attention-to}.

[141]Adesewa Olofinko, 'The second scramble for Africa: The EU's Global Gateway Strategy', *Global Voices* (20 November 2024), available at: {https://globalvoices.org/2024/11/20/the-second-scramble-for-africa-the-eus-global-gateway-strategy/}.

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promoting African beneficiation (refining) and added value (localisation).[142] Then, in March 2023, the EU launched the European Critical Raw Materials Act, which received final approval in March 2024.[143] The Act is designed to build up the EU's domestic supply chains and foster international engagement. Although Africa is not specifically mentioned in the Act, it is clear that the continent will receive particular attention. This is illustrated by the MoU signed between the EU in 2023 and three African partners to develop critical raw materials value chains and transport connectivity in Angola, the DRC, and Zambia as part of the Lobito Corridor, and a 2025 mineral agreement with South Africa to assist local beneficiation and logistical rail infrastructure.[144]

Economic development is not an inclusive concept, and African states have begun to recognise the need to collaborate among themselves to harmonise policies, pool resources, offer clear regulatory frameworks, and pursue equitable African development strategies emphasising environmental, social, and governance responsibility. The practical reality of this approach is encapsulated in the AU's December 2024 launch of Africa's Green Mineral Strategy. The aim is to achieve broad-based sustainable growth and socio-economic development of critical mineral resources and green mineral value chains for equitable resource-based industrialisation to enhance the quality of life of the African people.[145] The strategy demonstrates how cooperative African solutions to African problems can be nurtured. Yet, in the spirit of partnership, the West can also play its part, as evidenced by recent US policies aimed at working with African states to remove the 'infrastructure deficit' that hinders critical mineral access. This is illustrated by Washington's engagement, along with the EU, in the ambitious Lobito Corridor expansion programme, intended to facilitate Western access to critical minerals through the removal of transportation bottlenecks. The emergence of African and Western projects will create opportunities for the upgrading of Africa's economic role beyond simply extraction to downstream higher value-adding beneficiation, including the promotion of associated development multipliers to assuage local power outages, improve infrastructure, accelerate industrial diversification, and strengthen local supply chains.[146]

Conclusions

This study has analysed the challenges Africa faces in leveraging non-dependent mineral-driven economic transformation. Critical minerals are essential ingredients of renewable energy technologies and next-generation weapons systems that potentially represent the transformational force for Africa's very own 4iR process. Yet, the biggest challenge Africa must overcome is the *realpolitik* of critical mineral extraction in Africa, where supply chains are viewed as vehicles for boosting foreign investing states' economic security rather than African prosperity. Although Africa can benefit from this skewed development process, the economic damage from earlier Western interventions, both colonial and corporate, has left Africa scarred by resource exploitation. This led to an initial reluctance to engage with Western nations, not helped by the latter's benign neglect of Africa's critical minerals markets. Inevitably, this encouraged Sino–Russian entry to fill the investment void,

[142]Robert Hodgson, 'EU targets Africa's mineral wealth and green energy in new partnership', *Euronews* (13 March 2025), available at: {https://www.euronews.com/my-europe/2025/03/13/eu-targets-africas-mineral-wealth-and-green-energy-in-new-partnership}.

[143]Council of the EU, 'Strategic autonomy: Council gives its final approval on the critical raw materials act', *Press Release, European Council* (18 March 2024), available at: {https://www.consilium.europa.eu/en/press/press-releases/2024/03/18/strategic-autonomy-council-gives-its-final-approval-on-the-critical-raw-materials-act/}.

[144]'Global Gateway: EU signs strategic partnerships on critical raw materials value chains with DRC and Zambia and advances cooperation with US and other key partners to develop the "Lobito Corridor"', *Press Release, EU Commission* (26 October 2023), available at: {https://ec.europa.eu/commission/presscorner/detail/en/ip_23_5303/}. Hodgson, 'EU targets Africa's mineral wealth and green energy in new partnership'.

[145]*Africa's Green Minerals Strategy (AGMS), African Union (2024), available at: {https://au.int/en/documents/20250318/africas-green-minerals-strategy-agms}*.

[146]Bruce Dickinson, Nomsa Mbere, and Paula-Ann Novotny, 'Critical minerals: Driving Southern Africa's sustainable growth', *Mining Review Africa* (28 January 2025), available at: {https://www.miningreview.com/news/critical-minerals-driving-southern-africas-sustainable-growth/}.

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and China, in particular, seized the moment by providing African states with substantial loans and investment through the BRICS and BRI trading mechanisms. There is no doubt this funding flurry will continue, and the West needs to be wary of the profound strategic implications that a more formal BRICS–BRI liaison will have on Africa's trading, investment, and security landscape. Russian interventions, by contrast, have not been motivated by a grand strategy, but rather by strategic opportunism. Its use of proxy military forces has proved instrumental in securing the support of autocratic governments and local military juntas in facilitating inter-state smuggling and the illicit trading of 'blood' minerals. Both China and Russia have traded arms for influence in the creation of African client states, bolstered by unorthodox 'guns-for-minerals' barter practices to gain access to African mines.

The recently raised strategic profile of critical minerals in energy and military transition has energised Western policy debate, leading to significant multilateral initiatives, such as the US MSP friendshoring agreement and the EU Global Gateway Strategy and Critical Raw Materials Act, as well as joint African and Western initiatives, including the important Lobito transport infrastructural venture. Accordingly, going forward, if the West is to forge meaningful economic and strategic relations with African resource-rich states, then an urgent reset in statecraft is required, reflecting a non-exploitative partnership whereby African states are entreated to the same human and corporate rights as their Western counterparts. The formulation of a 'superior' African–Western critical mineral paradigm will be dependent on the continent reaping the benefits from long-run mutually beneficial local and foreign relations designed to encourage indigenous and sustainable African value-adding refining, rather than simply extraction, alongside adherence to ethical, social, and governance principles. In fact, governance will be key to ensuring that representative and accountable African regimes are established, aimed at rationalising critical minerals investment as an opportunity to foster indigenous democratic development rather than quick economic fixes perpetuating the negative trade-off between external politico-economic support and internal liberal development agendas. Thus, while the principal motivation behind superpower Africa-engagement strategies is influence and ultimately control over Africa's critical mineral resources, as characterised by Chinese infrastructural loans, debt, and dependence, and Russian security partnerships with autocratic governments, the West must move beyond its reactive strategy to embrace a power-profit-sharing narrative that proactively prioritises partnership relations to maximise 'African' wealth creation.

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