

POLICY BRIEF



Reimagining Africa's Critical Mineral Value Chains: From Extraction to Equitable Green Industrialisation in a Multipolar World

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05

Accelerating Climate
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Abstract

Africa holds an outsized share of the world's critical energy transition minerals (CETMs), yet its role in global value chains remains largely extractive. This brief argues that African countries and their partners must reshape their approach to CETMs, ensuring that extraction, processing, and manufacturing contribute to sustainable industrialisation, economic diversification, and local value addition.

Recent global initiatives, including the EU's Critical Raw Materials Act, Global Gateway, and the US-led Mineral Security Partnership, aim to establish alternative CETM supply chains. These strategies include addressing local priorities such as governance, community participation, and environmental sustainability in their preambles, but the full implementation of these principles is still lacking. Meanwhile, Africa's existing frameworks, such as the Africa Mining Vision and the Africa Green Minerals Strategy, remain underutilised due to weak implementation, elite-driven policies, and insufficient integration into global trade systems. The risk of replicating past extractive models is evident in projects like the Lobito Corridor and the EU-Namibia's critical minerals agreement, which – while promising – expose gaps in Africa's ability to dictate terms of engagement.

This brief proposes a three-pronged approach to transforming Africa's CETM sector, namely (1) regional industrial policy leading to African-based value addition – enhancing processing and manufacturing capacities to break dependence on raw material exports and leveraging the African Continental Free Trade Area to reduce intra-African competition that leads to a “green race to the bottom”; (2) people-centred governance – ensuring local participation in decision-making through free, prior, and informed consent, community benefit agreements, and strengthened formal and artisanal labour protections and rights; (3) transformation of global industrial financing mechanisms and technology transfer agreements to support Africa's green industrialisation; and (4) shaping Europe-Africa cooperation and trade relations through the development of common standards for secure and resilient CETM supply chains.

Keywords: Critical Energy Transition Minerals; Green Industrialisation; Local Value Addition; Europe-Africa Cooperation; Technology Transfer

Diagnosis

Critical energy transition minerals (CETMs) have become a focal point for G20 discussions, with Indonesia,¹ India,² and Brazil³ shaping the agenda through their respective presidencies. South Africa's G20 presidency (2024–2025) has committed to prioritising CETMs as a driver of inclusive growth and sustainable development.⁴ The lack of industrialisation in Africa particularly and the Global South more generally has been well documented.⁵ The emergence of the CETM discourse and these minerals' importance in leading the global transition away from a fossil-fuelled world has again brought to the forefront persistent challenges on how Africa's resources can lead to equitable development.⁶

¹ G20, *Bali Leaders' Declaration*, November 16, 2022, <https://g20.org/wp-content/uploads/2024/09/2022-11-16-g20-declaration-data.pdf>.

² Ministry of Commerce and Industry, Government of India, *G20 Trade and Investment Working Group Outcome Document*, 2023. During the G20 Energy Transition Ministers' Meeting (ETMM) at the fourth Energy Transition Working Group (ETWG) in Goa in July 2023, members officially recognized the significance of critical minerals and the necessity of a stable supply chain. For the first time, a dedicated section on the role of critical minerals in the energy transition was incorporated into the outcome document and chair's summary, following negotiations spearheaded by the Indian government.

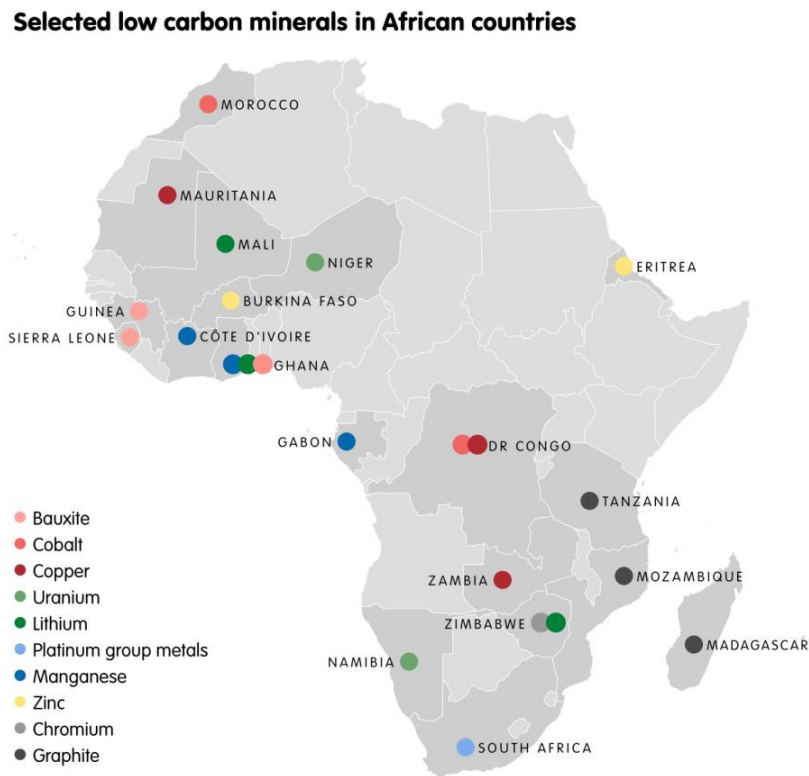
³ Government of Brazil, *G20 Presidency Priorities: Sustainability and Development*, 2024, <https://www.gov.br/planalto/pt-br/media/18-11-2024-declaracao-de-lideres-g20.pdf>. According to point 52 of declaration, the G20 endorsed the development of secure, diverse, sustainable, and responsible supply chains to support energy transitions, including for critical minerals, beneficiated materials, semiconductors, and related technologies. Additionally, they acknowledged the contributions of experts assembled under the UN Secretary-General's Panel on Critical Energy Transition Minerals.

⁴ Government of South Africa, *G20 Presidency Priorities: Harnessing Critical Minerals for Growth and Development*, 2024, <https://g20.org/news/wef-ramaphosa-on-significance-of-g20-presidency/>. President Cyril Ramaphosa stated that a key focus for South Africa's G20 presidency is to leverage critical minerals for inclusive growth and development. He emphasized the need for a G20 framework on green industrialization and investments to foster a comprehensive agreement that encourages value addition to critical minerals near their extraction sites.

⁵ South African Institute of International Affairs, *Industrialisation in Africa: How Can the G20 Assist?* (2023), <https://saiia.org.za/research/industrialisation-in-africa-how-can-the-g20-assist/#:~:text=Recent%20research%20shows%20that%20Africa's%20industrialisation%20problem,do%20not%20have%20similar%20levels%20of%20productivity.&text=In%20order%20for%20Africa%20to%20raise%20living,youth%20and%20diversify%20exports%2C%20it%20must%20industrialise.>

⁶ Elias Ayuk, Antonio Pedro, Paul Ekins, et al., *Mineral Resource Governance in the 21st Century: Gearing Extractive Industries Towards Sustainable Development* (2020), https://orbi.uliege.be/bitstream/2268/254890/1/mrq_report_final_web_v2%20%281%29.pdf.

Figure 1. African countries with critical minerals



Source: Mo Ibrahim Foundation, US Geological Survey, and European Council on Foreign Relations, <https://ecfr.eu/>

Many African mining areas are sacrifice zones,⁸ lacking adequate labour, health, and environmental standards. Most of the CETMs extracted from Africa leave the continent with little to no value added through development corridors like the Lobito corridor, which face heavy criticism⁹ for being resource extraction points instead of development gateways. Furthermore, there is a lack of recognition for the centrality of artisanal and small-scale miners (ASMs), leaving them unrecognised in the supply chain and excluded from the value chain.¹⁰

⁸ Fredrik Strindevall, "Mining for the Low-Carbon Transition: Conflicting Discourses of Sacrifice Zones and Win-Win Narratives" (2021), <https://www.diva-portal.org/smash/record.jsf?pid=diva2%3A1568937&dswid=4636>.

⁹ Africa Policy Research Institute, *Lobito Corridor – A Reality Check* (2024), <https://doi.org/10.59184/sa.038>.

¹⁰ International Institute for Sustainable Development, *Artisanal and Small-Scale Mining of Critical Minerals* (2024), <https://www.iisd.org/system/files/2024-12/artisanal-small-scale-mining-critical-minerals.pdf>.

The failure at global gatherings such as COPs¹¹ to agree on adequate financing and technology transfer required for climate adaptation and green industrialisation in the Global South has resulted in African countries accepting fossil fuel-based industrialisation investments.¹² This will likely result in them being locked out of future markets increasingly adopting carbon pricing, such as the Carbon Border Adjustment Mechanism (CBAM) and clean trade investment partnerships, which will have an outsized impact on countries such as South Africa, Egypt, Mozambique, and Zimbabwe,¹³ exacerbating global inequalities. Within Africa, there has been a failure to ratify the Africa Mining Vision's (AMV) operationalisation statutes¹⁴ due to differing political priorities among countries, a lack of institutional capacity at the AU, and poor implementation of pan-African policy frameworks.¹⁵

One of the most promising opportunities to develop international cooperation on sustainable minerals supply chains in African countries could stem from the EU's growing interest in CETMs.¹⁶ The EU's Global Gateway¹⁷ sets as a key objective the development of reliable and socially and environmentally sustainable CETM supply chains, in line with priorities and principles

¹¹ Kudakwashe Manjonjo, "COP29 Failed Africa: What Went Wrong with the Climate Financing Bid and What Happens Next?" *The Conversation*, 2024, <https://theconversation.com/cop29-failed-africa-what-went-wrong-with-the-climate-financing-bid-and-what-happens-next-245300>.

¹² Reuters, "China's Tsingshan \$1 Bln Steel Plant in Zimbabwe Starts Production," June 20, 2024, <https://www.reuters.com/markets/commodities/chinas-tsingshan-1-bln-steel-plant-zimbabwe-starts-production-2024-06-20/#:~:text=China's%20Tsingshan%20%241%20bln%20steel%20plant%20in%20Zimbabwe%20starts%20production>.

¹³ Africa Climate Foundation, *Implications for African Countries of a Carbon Border Adjustment Mechanism in the EU* (2024), <https://africanclimatefoundation.org/research-article/implications-for-african-countries-of-a-carbon-border-adjustment-mechanism-in-the-eu/>.

¹⁴ Only four countries have ratified the AMDC (African Minerals Development Centre) Statute: Guinea, Mali, Zambia, and Nigeria. A minimum of 15 ratifications are required to fully operationalize AMDC and the African Union

¹⁵ As noted by the Africa Policy Research Institute (APRI), the greatest danger the Green Minerals strategy faces is similar challenge to the AMV of strong Pan-Africanist political rhetoric supporting continental cooperation followed by limited cooperation on implementation resulting in stalled progress.

¹⁶ The [Minerals Security Partnership Forum](#) launched in 2024 is one of the most recent expressions of this interest on CRMs.

¹⁷ Launched in 2019, the [Global Gateway](#) aims at supporting investments for sustainable development worldwide, with a focus on the Global South.

adopted at the G20 level.¹⁸ The Global Gateway's initiatives in Africa aim to be an alternative model in an economic and industrial landscape in which China, the world's leading player in CETMs, holds a leading role.¹⁹

Many African countries have signed agreements and memoranda of understanding (MoUs) with the EU in the Global Gateway initiative: the Democratic Republic of Congo,²⁰ Namibia,²¹ Rwanda,²² and Zambia. Most recently, negotiations have begun with South Africa.^{23,24} These agreements are seen as an essential step to secure supply chains that include Europe, a continent that relies heavily on CETM imports for its economy (see Figure 2).

¹⁸ Most recently, the 2024 Leaders' Declaration, the G20 supported "reliable, diversified, sustainable and responsible supply chains for energy transitions, including for critical minerals".

¹⁹ China's prominence in Africa's mining sector has spun from a combination of strategic state support, an integrated policy framework that aligns infrastructure development with resource extraction, pragmatic engagement with a range of political regimes, and the deployment of innovative financing models such as resource-for-infrastructure agreements. See also: Africa Policy Research Institute, "China's Role in Africa's Critical Minerals Landscape: Challenges and Key Opportunities", 2024, <https://afripoli.org/chinas-role-in-africas-critical-minerals-landscape-challenges-and-key-opportunities>

²⁰ European Commission, "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,'" 2023, https://ec.europa.eu/commission/presscorner/detail/en/ip_23_5303.

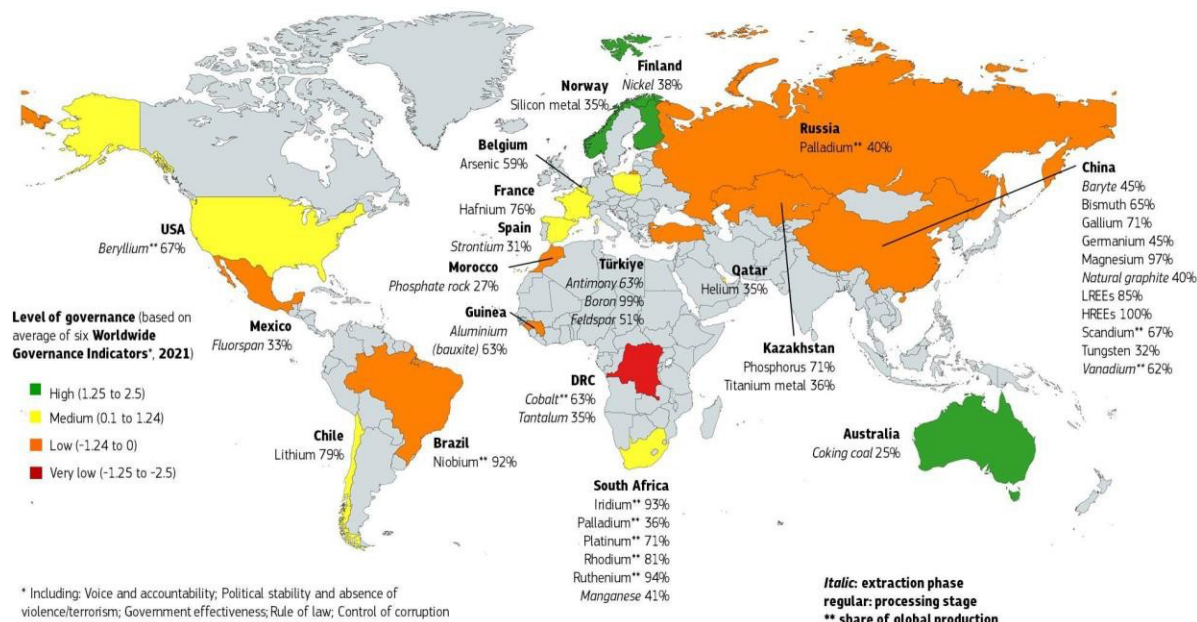
²¹ European Commission, "COP27: European Union Concludes a Strategic Partnership with Namibia on Sustainable Raw Materials and Renewable Hydrogen," 2022, https://ec.europa.eu/commission/presscorner/detail/en/ip_22_6683.

²² European Council, "EU-South Africa Summit, 13 March 2025 - Main Results," 2025, <https://www.consilium.europa.eu/en/meetings/international-summit/2025/03/13/>.

²³ European Council, "EU-South Africa Summit, 13 March 2025 - Main Results," 2025, <https://www.consilium.europa.eu/en/meetings/international-summit/2025/03/13/>.

²⁴ European Commission, "EU-South Africa Global Gateway Investment Package," 2025, https://international-partnerships.ec.europa.eu/document/download/18662c9d-6666-4089-952f-f012eb535d0a_en?filename=GG-South-Africa-Investment-Package.pdf.

Figure 2. The EU's dependency on critical minerals



Source: European Commission, "RMIS - Raw Materials Information Systems" (n.d.), https://rmis.jrc.ec.europa.eu/images/CRMs_2023.jpg

Despite their ambition, the EU's Global Gateway MoUs and agreements signed until 2024 have yet to evolve into more structured partnerships, and doubts have arisen about their potential to stimulate economic and social development in African partner countries. The reason behind the weakness of these agreements might be the EU approach, still quite top-down, which failed to discern the geopolitical context and the local specificities of its partners, and a lack of transparency about financing instruments.²⁶ An example of this detachment between ambitions and reality is the EU–Namibia MoU of 2022, which has so far failed to evolve into a structured plan to develop a Namibian CETM supply chain with European partners.²⁷

²⁶ European Think Tanks Group (ETTG), *The Global Gateway Three Years Later – An African Reality Check for the Next Commission* (2024), <https://ettg.eu/global-gateway-three-years-later/>.

²⁷ *South China Morning Post*, "Why the EU Is Failing to Capitalise on African Critical Minerals as China Marches On," 2024, <https://www.scmp.com/news/china/diplomacy/article/3287709/why-eu-failing-capitalise-african-critical-minerals-china-marches>.

Conversely, China, has developed effective “resource-for-infrastructure” initiatives in the framework of wider economic agreements²⁸ that have made it the *de facto* monopolist of many African-extracted CETM supply chains,²⁹ while failing or ignoring to fully adopt sustainability criteria.³⁰

Recommendations

African and most G20 countries are developing sufficient policy frameworks to support equitable development. The AMV, supported by the Africa Green Minerals Strategy and the African Continental Free Trade Area (AfCFTA),³¹ requires more intra-Africa cooperation among countries with large shares of critical minerals. Realistically, this can only be done if the G20 supports the AU with diplomatic and material support for ratifying the statutes of the Africa Minerals Development Centre, which is tasked with implementing the AMV. At least 11 more African countries³² need to ratify for the AMV to come into full force.

²⁸ See also: Policy Center for the New South, “The Impact of Chinese Investments in Africa: Neocolonialism or Cooperation?”, August 2023, <https://www.policycenter.ma/publications/impact-chinese-investments-africa-neocolonialism-or-cooperation>

²⁹ China's prominence in Africa's mining sector can be attributed to a combination of strategic state support, an integrated policy framework that aligns infrastructure development with resource extraction, pragmatic engagement with a range of political regimes, and the deployment of innovative financing models such as resource-for-infrastructure agreements. See also: APRI, “China's Role in Africa's Critical Minerals Landscape: Challenges and Key Opportunities”, September 2024, <https://afripoli.org/chinas-role-in-africas-critical-minerals-landscape-challenges-and-key-opportunities>

³⁰ A major example of the shortcomings of China's projects with an African partner could be the SICOMINES joint-venture in DRC. Launched in 2008 as a part of a 3 billion US\$ “resource-for-infrastructure” partnership, its positive impact on local businesses and communities has been limited, compared to the scope and the size of the investment. See also: Business & Human Rights Resource Centre, “Dem. Rep. of Congo: Chinese minerals-for-infrastructure Sicominex deal has failed to benefit the Congolese population according to analysts”, April 2019, <https://www.business-humanrights.org/en/latest-news/dem-rep-of-congo-chinese-minerals-for-infrastructure-sicominex-deal-has-failed-to-benefit-the-congolese-population-according-to-analysts/>

³¹ This includes African countries developing a coordinated trade and industrial policy response to carbon-based trade measures such as the EU's CBAM and emerging instruments like the CTIP, which introduce embedded carbon pricing into international trade flows. This includes establishing a harmonised framework under the AfCFTA to quantify and certify embedded carbon in exports, investing in emissions accounting infrastructure, and engaging in plurilateral negotiations at the WTO to shape carbon standards that reflect Africa's differentiated responsibilities and development priorities. Additionally, countries should strengthen their participation in international climate finance and technology transfer mechanisms to reduce adjustment costs and ensure the long-term competitiveness of African exports in low-carbon markets.

³² Only four countries have ratified the AMV. These countries are Guinea, Mali, Zambia and Nigeria.

This will support regional industrial policy cooperation in Africa based not on geographical economic communities,³³ as is the traditional case, but on percentage control over the known deposits and production of CETMs globally.³⁴ Cooperation between these countries can include similar investment frameworks requiring local content rules,³⁵ royalties, technology transfer, and other policies supporting green industrialisation. This will help mitigate the potential for a “green race to the bottom”.³⁶

A strong emphasis on governance is crucial to ensure Africa's transition to equitable green industrialisation. There are notable calls for a deeper set of criteria to be discussed in industrialisation policy that includes “green” provisions, which provide key metrics. Clear rules of engagement must be established in the mineral supply chain to prioritise local value addition and community involvement. This can be achieved by implementing policies requiring mineral beneficiation near the extraction site, creating jobs and fostering economic diversification.

By applying free, prior, and informed consent,³⁷ community benefit agreements – which include gender equity and youth employment – can ensure that local communities are integral to the decision-making process

³³ African Union, “Regional Economic Communities (RECs),” <https://au.int/en/recs>. Africa has eight regional economic communities recognized by the African Union.

³⁴ This will include countries like the Democratic Republic of Congo, Zambia, South Africa, Guinea, Tanzania, Zimbabwe, Mozambique.

³⁵ Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development, “Local Content Policies,” <https://www.igfmining.org/local-content-policies/>.

³⁶ Alioune Lebdioui, *Survival of the Greenest* (Cambridge University, 2024).

³⁷ Karabo Mokgonyana, “Protect Local People’s Rights in Renewable Energy Projects,” *Mail & Guardian*, August 27, 2024, <https://mq.co.za/thought-leader/2024-08-27-protect-local-peoples-rights-in-renewable-energy-projects/>. FPIC is a principle rooted in international human rights law, notably enshrined in the [United Nations Declaration on the Rights of Indigenous Peoples \(UNDRIP\)](#). It mandates that any development project must obtain their consent before proceeding. The consent must be: (1) Free – given voluntarily, without coercion, intimidation, or manipulation; (2) Prior – sought sufficiently in advance of any authorization or commencement of activities; (3) Informed – based on an understanding of the full range of information about the project, including potential harms and benefits; and (4) Consent – people must have the right to approve or reject the project.

and benefit directly from extracting critical minerals. Additionally, strengthening labour protections and rights for both formal and informal workers, such as ASMs, is essential. This broader criterion can be captured in a green industrialisation index.³⁸ The potency of this index is its ability to become a measuring tool for green industrialisation and value addition of critical minerals, including other social and economic factors. The G20 can adopt and improve the index to achieve its stated aims and agreements.

³⁸ A green industrialisation index is a tool designed to measure and benchmark the performance of an economic actor (company, country) or policy in green manufacturing and sustainable industrial development, focusing on manufacturing green goods, producing inputs for green industries, green employment, and de-carbonization of existing industries. In a green industrialisation index, the tools and instruments that policymakers could use are like those typically used in traditional industrial policies, but which add green filters/criteria. Africa through the AfDB has a traditional industrialisation index and green filters/criteria can be added to it to assist in measuring Africa's progress on re-aligning its economy.

Table 1. Green Industrialisation Index

Green Industrialization Index	
DIMENSION	INDICATORS
Capacity to produce and export green products	Green MVA per capita
	Green-manufactured exports per capita
	Local content percentage (local content value/ total production value)
The Role of Green Manufacturing	Share of Green MVA in total MVA
	Share of green manufactured exports in total manufactured exports
Social and environmental aspects of green manufacturing	Share of green manufacturing employment in total manufacturing employment
	Co2 manufacturing from employment per unit of manufacturing value added
Green Financial Policy and Regulations	Tax credits/ Grants/Exemptions for low-carbon technology consumption
	Tax credits/ Grants/Exemptions for low-carbon technology production
	Green Public Procurement rate- % of green goods and services as a percentage of total procurement spend
	Subsidised green credit to firms: Difference between market rate and subsidised green market rate.
Government Policy and Regulations (Infrastructure)	% of public electricity from renewable energy
	Public investment in related green industrial infrastructure
	Resource Circularity Ratio
Education	Research and Development- Green industry patent registration and waivers
	Number of Green incubators, accelerators and Green skills development programmes
Environmental and Social Legislation Protection	Free, Prior, Informed Consent Legislation
	% of Youth employment in Green Industries
	% of Gender Parity in Employment in Green Industries
	Environmental and Mining Standards

Source: Kudakwashe Manjonjo (2025) *Green Industrialization of Transition Minerals, Technology Transfer and Africa-China Cooperation (to be published)*

On the technology transfer front, Western countries must shift investment strategies to facilitate the transfer of both capital and skills to African nations. For example, the EU Raw Materials Act⁴⁰ requires cooperation that includes

⁴⁰ EU Raw Materials Act: Article 37 states that (ii) improving cooperation along the critical raw materials value chain between the Union and partner countries, including capacity building and technology transfer programs to promote circularity and responsible recycling of critical raw materials in producing countries; (iii) the economic and social development of partner countries, including by promoting sustainable and circular economy practices, decent working conditions and respect for human rights along their raw material value chains.

technology transfer and capacity building, which the EU can provide to Africa by supporting the strengthening of mining transparency and accountability structures at source, as well as programmes that support legalisation and formalisation of ASMs.

Effective investment deals should include technical training, capacity building, and access to advanced technologies, enabling African industries to process minerals domestically. These agreements should emphasise value beneficiation, environmental sustainability, and robust community engagement. For these efforts to succeed, they must be aligned with regional frameworks like the AfCFTA⁴¹ to prevent intra-continental competition and foster a unified approach to sustainable industrialisation.

When engaging with African countries, G20 countries should ensure that their commitments and methods are tailored to the specific development priorities and institutional contexts of their African partners. For example, to differentiate its proposals from other development models, in its approach towards Africa and in its new clean trade and investment partnerships with African partners, Europe should prioritise an integrated approach that contributes to building ideal ecosystems for sustainable industrial development in the African continent.⁴² This would make collaboration with Europe more advantageous for its counterparts in the medium to long term. This means:

- mapping the specific context, within a framework of dialogue and exchange with African partners, based on a shared conception of "local added value". This approach ensures that the initiatives are tailored to the

⁴¹ African Union, *Agreement Establishing the African Continental Free Trade Area* (2018), <https://au.int/en/treaties/agreement-establishing-african-continental-free-trade-area>.

⁴² Joseph Bofo et al., "The Race for Critical Minerals in Africa: A Blessing or Another Resource Curse?" *Resources Policy* 93 (2024), <https://doi.org/10.1016/j.resourpol.2024.105046>.

unique needs and strengths of each region, fostering more effective and sustainable outcomes;⁴³

- providing greater transparency regarding Global Gateway funding and how it contributes to alleviating the debt distress of African countries. Clear communication about the allocation and impact of these funds is crucial for building trust and ensuring that the financial support is genuinely beneficial for the recipient nations;⁴⁴ and
- striving, in both multilateral initiatives and bilateral perspectives,⁴⁵ to build a shared global vision in the field of CETMs. This involves creating collaborative frameworks that address the global demand for these materials while promoting responsible and sustainable extraction practices. By aligning efforts and resources, G20 countries can develop resilient supply chains that support mutual growth and stability.

G20 countries should engage more attentively with their African partners' perspectives and aspirations. This means:

- fulfilling their commitments included in the resource-for-infrastructure agreements, in particular critical transport or energy infrastructure whose achievement has been lacklustre in some cases; and
- switching from an increasingly inadequate resource-for-infrastructure model to more comprehensive agreements that:
 - support the development of local businesses within and beyond CETM value chains;

⁴³ ECCO, *Developing Common Standards for Secure and Resilient Critical Minerals Supply Chains* (2023), https://eccoclimate.org/wp-content/uploads/2023/05/Critical-Minerals_Report_website_EN-2.pdf.

⁴⁴ Center for Global Development, "What the Global Gateway Flagship Projects Tell Us About the EU's Priorities," 2024, <https://www.cgdev.org/blog/what-global-gateway-flagship-projects-tell-us-about-eus-priorities>.

⁴⁵ Climate Action Network, *UN Critical Energy Transition Minerals Report* (2024), <https://climatenetwork.org/2024/09/11/un-critical-energy-transition-minerals-report/>. This includes actioning the United Nations Panel on Critical Minerals five actionable recommendations.

- improve environmental and social practices by adopting mining methods that minimise environmental impact and improve the wellbeing of workers and local communities;
- address accountability and governance issues, to maximise the positive impact of mining projects and create a more favourable investment climate; and
- include conflict-mineral due diligence measures as essential safeguards to promote socially responsible and ecologically sustainable industrialisation.

The G20 can play a crucial role in fostering a multilateral framework that promotes fair and transparent resource governance, ensuring that mineral-rich countries retain greater economic benefits from extraction. This requires moving beyond extractive agreements toward structured partnerships that support industrialisation, local value addition, and fair labour practices.

Additionally, the G20 should advocate for the CRMA to integrate investment in infrastructure and processing capacity in resource-rich nations, rather than reinforcing existing supply chain dependencies. By leveraging G20 leadership, particularly through South Africa's presidency, stakeholders can push for strategic alignment between regional policies to create equitable, resilient, and sustainable global supply and value chains.

T20 South Africa convenors



The Institute for Global Dialogue (IGD)



The South African Institute of International Affairs (SAIIA)



The Institute for Pan-African Thought and Conversation (IPATC)

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