#10/26 OPEN CONSULTATION MONDAYS

CRITICAL MINERALS

AND THE G20

Industrial Development and Policy Independence in the Global South

BEYOND EXTRACTION
Building industries that retain value

AFRICA'S OPPORTUNITY
Cooperation, capacity and regional growth

WHO BENEFITS?
Communities, accountability and the environment

IN ASSOCIATION WITH

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An informal engagement of global think tanks

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1. INTRODUCTION AND BACKGROUND

Growing international competition for critical minerals has created an opportunity for resource-producing countries to secure a greater share of the economic activity associated with their mineral wealth. Whether this opportunity translates into industrial development will depend on the terms of investment, the capacity to process resources competitively and the ability of governments to ensure that the benefits reach their societies. Increased demand alone will not deliver these outcomes.

Against this background, the Global South Perspectives Network, in association with T20 U.S. 2026, convened an Open Consultation Mondays dialogue on 12 October 2026 under the theme Critical Minerals and the G20: From Strategic Resources to Developmental Assets. The consultation examined how producing countries could use growing interest in their resources to advance industrialisation, economic diversification and sustainable development while retaining control over their development choices.

The discussion took place within an international environment in which minerals are increasingly treated as strategic assets. Their importance to the energy transition, advanced manufacturing, digital technologies and national security has intensified efforts by major economies to secure reliable supplies. Attention has consequently extended beyond access to mineral deposits to control over processing, refining and the technologies that connect raw materials to manufactured products.

For countries of the Global South, this raises a familiar development concern. The possession and export of natural resources have not consistently produced diversified economies, technological progress or sufficient employment. A central question is therefore whether the present period of international competition can support a more productive relationship between mineral extraction and wider economic development.

The consultation explored the conditions required to achieve this. These included investment in energy and transport infrastructure, technical skills, access to finance and the development of processing capacity. It also considered the limits of beneficiation policies where restrictions on raw material exports are introduced without the investment needed to establish viable industries.

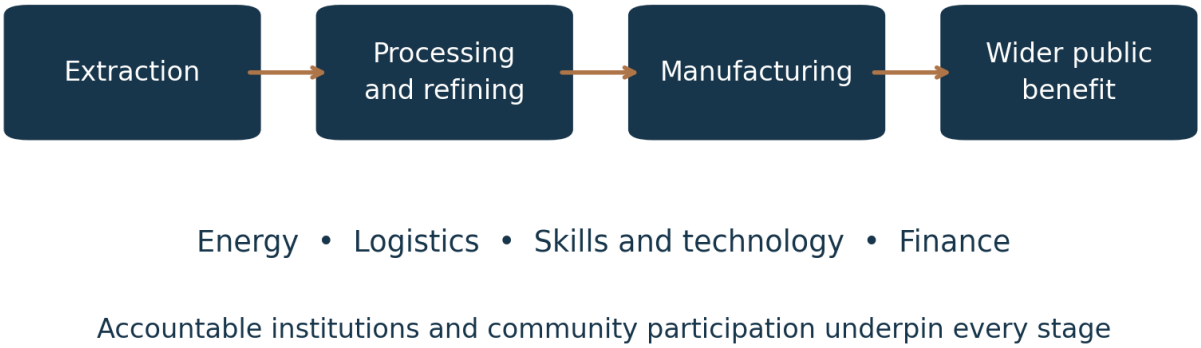
African cooperation featured prominently. Countries pursuing development objectives independently may compete for investment in ways that weaken their collective negotiating position. Regional partnerships could offer opportunities to combine mineral resources with existing industrial capabilities, share infrastructure and develop markets within Africa. South Africa's potential contribution was considered alongside the domestic constraints affecting its ability to participate effectively.

The discussion also addressed the governance of mineral partnerships. Particular attention was given to negotiating capacity, the implications of exclusive supply arrangements, environmental

responsibility and the participation of affected communities. These considerations bear directly on whether mineral development produces lasting public benefit and whether producing countries retain sufficient freedom to adapt their policies as markets and technologies change.

This report brings these themes together and identifies the policy considerations arising from the dialogue. It reflects the range of arguments advanced during the consultation, without treating every proposal as a collectively agreed position. Its underlying concern is how mineral-producing countries can convert their resources into lasting productive capacity and improved living conditions for their people.

Figure 1: From mineral resources to wider development



Conceptual graph based on the report. Arrows show intended linkages, not guaranteed outcomes or measured increases in value.

2. CRITICAL MINERALS AND THE CHANGING GEOPOLITICAL CONTEXT

The growing strategic importance of critical minerals is changing the relationship between producing countries and the economies that depend on their supply. Access to these resources is increasingly viewed through the requirements of national security, technological competition and industrial development. This gives mineral-producing countries greater international attention, but it also exposes them to pressures that may complicate their development choices.

The dialogue identified a shift in how minerals are understood within the global economy. Their value extends beyond the revenue earned from extraction and export.
Control over particular stages of production can influence the ability of other countries to manufacture advanced technologies, expand renewable energy systems and sustain industries considered essential to their security. Processing and refining capacity have therefore become important sources of strategic influence.

China's established position in these activities featured prominently in the discussion. Efforts by other major economies to diversify supply chains reflect concerns about dependence on concentrated sources of production and expertise. However, reducing such dependence requires more than identifying alternative mineral deposits. It involves developing infrastructure, acquiring technical knowledge and establishing industries capable of operating at the required scale.

The discussion cautioned that this will take time. Supply chains have developed over decades, and new projects may continue to depend on Chinese equipment, firms or finance even where diversification is an explicit objective. The practical interdependence of these activities complicates attempts to divide the minerals economy into competing blocs. Producing countries need to understand these relationships when assessing what prospective partners can deliver.

Competition nevertheless creates opportunities. Where several economies are seeking access to the same resources, producing countries may be better placed to negotiate investment in processing, infrastructure and technical capacity. The developmental value of this competition will depend on whether governments can translate expressions of strategic interest into commitments that support their own economic objectives.

This requires an understanding of the interests driving each prospective partner. The dialogue drew attention to the strong national security considerations informing the United States' approach. It also noted that the United States, China and the European Union may use similar language about economic security while pursuing different objectives. Their domestic industries, political priorities and perceived vulnerabilities shape the partnerships they seek. Producing countries cannot assume that a common vocabulary implies a common offer.

An important concern is whether the arrangements concluded preserve sufficient policy independence. Exclusive supply agreements may provide investment or access to a dependable buyer, but they may also limit opportunities to trade with other partners or pursue different industrial relationships. Their implications extend beyond the immediate commercial transaction where they bind a country's resources to the strategic priorities of an external power.

The dialogue raised this as a question of sovereignty. Countries seeking investment need to consider how agreements affect their future choices, including the ability to develop local industries and respond to changing markets. No detailed contractual framework was examined, but the concern was clear: the value of a partnership must be assessed over its duration and against the development options it may open or restrict.

The changing international environment also has implications for industrial policy. The discussion suggested that the greater willingness of major economies to intervene in strategic industries has altered the political context in which producing countries pursue their own development measures. However, this does not remove the constraints associated with international trade and investment rules. Governments still need to distinguish between greater political room for intervention and measures that have a secure legal basis.

Technological change introduces a further complication. Strategic interest in a mineral today does not guarantee the same level of demand throughout the life of a mining or processing investment. Changes in battery technologies and efforts to reduce dependence on particular inputs illustrate how manufacturers may respond to supply vulnerabilities. These adjustments can gradually weaken the bargaining position of countries whose development strategies depend heavily on a narrow range of minerals.

The geopolitical opportunity is therefore substantial, but conditional. Producing countries need the capacity to assess competing offers, negotiate workable commitments and anticipate changes in demand. Their position will be strengthened where mineral diplomacy forms part of a clear industrial strategy. Without that connection, increased competition for resources may secure new supplies for consuming economies while leaving the productive structure of the countries supplying them largely unchanged.

Table 1: Strategic opportunities and risks

ISSUE	POTENTIAL OPPORTUNITY	RISK OR CONDITION
Competition for supply	Negotiate processing, infrastructure and skills investment	Strategic interest must become enforceable commitments
Exclusive supply agreements	Access to investment and a dependable buyer	May restrict alternative partners and future policy choices
Supply chain diversification	Develop new production and processing capacity	Existing interdependence and long project lead times persist
Technology and demand	Link mineral production to emerging industries	Substitution and changing demand can weaken bargaining power

Source: *Editorial synthesis of the dialogue as presented in this report. Proposals are not collectively adopted commitments.*

3. BENEFICIATION AND INDUSTRIAL DEVELOPMENT

The desire to retain more value from mineral resources is increasingly shaping policy across Africa, and other Global South regions. Governments are questioning arrangements under which minerals leave their countries with limited processing, while more advanced production and much of the associated employment develop elsewhere. The dialogue recognised this concern as a legitimate development priority. It also examined what is required to turn that priority into industries that can operate competitively and contribute to wider economic growth.

Beneficiation involves increasing the value of minerals through further processing. Its developmental significance depends on the activities established around it and the connections these create with the rest of the economy. A processing facility may generate employment and export revenue, but the broader opportunity includes technical learning, demand for local suppliers and the development of capabilities that can support other industries. These connections require deliberate attention if mineral development is to contribute to economic diversification.

The discussion drew an important distinction between requiring beneficiation and establishing the conditions under which it becomes viable. Restrictions on raw mineral exports can change the incentives facing mining companies and prospective investors. They cannot supply electricity, build transport infrastructure or provide the technical expertise needed to operate a processing plant. A beneficiation policy becomes part of a credible industrial strategy when it is supported by investment that addresses these requirements.

Several policy instruments were considered in this context. These included export bans, quotas, permit controls, export tariffs and requirements for local value addition. Their common purpose is to encourage greater domestic participation in mineral production beyond extraction. However, their effects depend on the mineral concerned, the availability of alternative supplies and the capacity of the producing country to accommodate the investment it seeks.

An export restriction may encourage a company to establish local processing where the commercial conditions support that decision. Where those conditions are absent, it may reduce production or redirect investment towards another jurisdiction. The policy choice therefore requires an assessment of how investors are likely to respond and what complementary measures would make the desired activity feasible. The dialogue did not support the assumption that restrictions would automatically produce industrial development.

Electricity emerged as a central constraint. Processing and refining require a dependable supply at a cost that allows facilities to compete. Where generation is insufficient or interruptions are frequent, the resulting costs can undermine investment even where mineral deposits are attractive. High electricity prices can create a similar problem. Decisions about beneficiation

consequently need to be connected to energy planning, including the investment required to supply new industrial activity.

Transport and logistics are equally relevant. Moving minerals between mines, processing facilities and markets depends on functioning infrastructure and reliable services. Weaknesses in these systems affect operating costs and the ability to meet delivery commitments. The development of a processing industry therefore requires consideration of the full production chain, including the infrastructure connecting its different stages. Announcing a value addition requirement without addressing these constraints leaves a substantial gap between the policy objective and its implementation.

Technical skills and access to technology present further challenges. Countries differ considerably in their existing industrial capabilities. Some have established engineering expertise and institutions capable of supporting more advanced mineral activities. Others face shortages that will require sustained investment in training and research. Partnership agreements can help address these gaps, but the content of those agreements matters. The relevant question is whether they build capabilities that can be retained and developed within the producing economy.

The dialogue also emphasised policy consistency and institutional credibility. Investors committing substantial capital over long periods need to understand the conditions under which projects will operate. Producing countries, in turn, need the capacity to enforce agreed obligations and ensure that investment serves public objectives. Uncertainty, weak administration and inconsistent enforcement can undermine both sides of this relationship.

Table 2: Conditions for viable beneficiation

REQUIREMENT	CONTRIBUTION	CONSTRAINT IDENTIFIED
Electricity	Reliable and competitively priced processing	Supply interruptions, insufficient generation and high costs
Transport and logistics	Connect mines, plants and markets	Unreliable services and weak infrastructure
Skills and technology	Operate facilities and retain capabilities	Technical shortages and dependence on outside expertise
Finance	Support long-term industrial investment	Capital requirements and uncertain commercial viability
Institutions	Provide consistency and enforce obligations	Weak administration and inconsistent implementation

Source: *Editorial synthesis of the dialogue as presented in this report. Proposals are not collectively adopted commitments.*

Governance failures can further weaken the developmental return. Where mineral revenues support patronage networks or private interests connected to political power, additional investment may increase the resources available for capture without improving public welfare. The discussion therefore linked industrial development to the quality of domestic institutions. Greater control over mineral activities has limited value if that control does not translate into accountable decisions and benefits for the wider population.

Examples raised during the consultation suggested that some countries are beginning to secure investment in more advanced processing. Zimbabwe's movement towards more processed lithium products was discussed as an indication of change, alongside arrangements involving co-investment by foreign firms. These examples demonstrated possible directions, rather than a single model for other countries to adopt. Their relevance depends on the circumstances that made the investment possible and the benefits it ultimately delivers.

Differences between minerals also require careful consideration. Copper, nickel and rare earth elements involve different production processes, volumes and technical demands. Their environmental consequences and opportunities for further manufacturing also differ. Even deposits of the same mineral may require different approaches, because of their geological characteristics. A broad commitment to beneficiation must therefore be translated into strategies suited to particular resources and locations.

The industrial objective emerging from the dialogue was to use mineral activity to build a stronger productive economy. This requires choices about which activities can be sustained, how they connect to other sectors and what investment is needed to establish them. Progress should be assessed through the capabilities developed and the public benefits achieved. Processing more material locally is relevant, but its lasting value depends on whether it supports competitive industries, better employment and economic opportunities that extend beyond the mine itself.

4. AFRICAN COOPERATION AND SOUTH AFRICA'S ROLE

African countries seeking to secure greater value from their minerals face a coordination challenge. They share an interest in attracting investment that supports industrial development, but they also compete for investors and access to markets. Where their policies differ substantially, companies may favour jurisdictions offering fewer obligations. The dialogue consequently considered how cooperation could strengthen the position of producing countries while making better use of their different resources and capabilities.

This concern is particularly relevant to beneficiation. A country requiring local processing may struggle to achieve its objectives if comparable resources remain available elsewhere without that requirement. Its ability to negotiate will depend partly on the alternatives available to investors. Cooperation between producing countries could help address this problem by reducing the scope for competing national approaches to weaken their development ambitions.

Coordination does not require every country to adopt identical policies. Mineral resources, infrastructure and institutional capabilities differ, as do national development priorities. The practical task is to identify where cooperation can improve outcomes for participating countries. This could involve coordinating aspects of mineral negotiations, sharing expertise or developing projects that combine resources and production capabilities across borders.

The dialogue placed particular emphasis on the potential for regional production arrangements. It may be neither feasible nor commercially sensible for every mineral-producing country to establish the same processing facilities. Some countries may have the deposits, while others possess more developed industrial infrastructure or technical expertise. Cooperation could allow these strengths to support a shared production chain, with different activities undertaken where the conditions are most suitable.

Such arrangements would require agreement on how the value is distributed. A country supplying raw materials would need a clear developmental return, even where processing takes place across its border. Otherwise, regional cooperation could reproduce the unequal relationships that producing countries are seeking to change. The credibility of a partnership would depend on whether its terms advance the interests of each participant and can be sustained over time.

Bilateral cooperation was identified as a practical starting point. Although continental and regional strategies provide a broader framework, implementation has often been uneven. Projects involving a smaller number of countries may offer opportunities to develop workable arrangements around particular resources. These experiences could then inform wider cooperation. Examples discussed included initiatives involving the Democratic Republic of the Congo and Zambia, and opportunities for cooperation between Malawi and Mozambique.

The discussion also explored partnerships in which African countries work together with an external participant. An arrangement could combine mineral resources in one country with processing capabilities in another, supported by finance, technology or market access from a third partner. The developmental purpose would need to guide its design. Securing an external investor would be one part of the arrangement; establishing productive activity and distributing its benefits would remain central.

South Africa was considered a potential contributor to these forms of cooperation, because of its existing industrial, technical and corporate capabilities. These could support partnerships with countries seeking to move into more advanced mineral activities. The opportunity extends to cooperation with other developing economies, including India, Indonesia and Brazil, where exchanges of expertise and investment could help broaden the options available to African producers.

However, the dialogue also questioned South Africa's capacity to act effectively on these possibilities. Electricity costs, weaknesses in logistics and uncertainty in the policy environment were identified as constraints on mining and associated industries. A country cannot offer itself as a dependable regional processing partner without addressing the domestic conditions affecting production. South Africa's contribution to regional industrial development therefore depends partly on progress within its own economy.

A proposed response was greater cooperation between government, business and social partners. The discussion called for a practical agreement focused on overcoming obstacles to investment and production. It also raised the role of development finance institutions in supporting projects with the private sector. These proposals reflected concern that extensive policy debate had not been matched by sufficient implementation.

Business and civil society were seen as having a continuing role where political or diplomatic difficulties constrained government engagement. South African companies could sustain commercial relationships and explore projects with partners elsewhere. Such activity would still depend on an effective public framework, particularly where infrastructure, regulation and agreements between countries are involved. Private initiative and public capability would need to reinforce one another.

Trust between African countries was another consideration. The dialogue raised concern that hostility towards foreign nationals in South Africa could damage relationships and make cooperation more difficult. Regional partnerships depend on confidence that participating countries respect one another's interests. Domestic conduct can therefore affect the environment in which economic diplomacy takes place.

The discussion further challenged the assumption that mineral development should remain primarily directed towards markets outside Africa. Processing resources for export may increase the value retained on the continent, but opportunities also warrant examination within African economies. Developing regional demand could connect mineral production to manufacturing that serves African consumers and industries.

The opportunity emerging from the dialogue was for cooperation based on practical complementarities. South Africa could contribute to that effort, provided it addresses its domestic constraints and approaches partnerships in ways that recognise the development priorities of other countries. The objective would be stronger regional production and a fair distribution of its benefits.

5. INTERNATIONAL GOVERNANCE AND NEGOTIATING CAPACITY

The international arrangements governing critical minerals are developing through a combination of national strategies, investment agreements and partnerships between selected countries. These arrangements will influence who obtains access to resources, where processing takes place and how the resulting value is distributed. The dialogue questioned whether producing countries have sufficient influence over this process, particularly where their technical and financial resources are limited.

A central concern was that consuming economies are moving quickly to secure their interests while producing countries face uneven capacity to negotiate their participation. The resulting arrangements may address security of supply without giving comparable attention to industrial development in the countries supplying the minerals. This makes the design of international cooperation relevant to the development options available to producers.

The discussion approached this challenge by examining particular gaps in governance. These included access to information, negotiating expertise, space for industrial policy and the management of market risks. Different problems may require different mechanisms. A comprehensive new institution could take considerable time to negotiate, while more focused cooperation might deliver useful improvements sooner.

Access to geological information and market intelligence was identified as a basic requirement. Governments need a sound understanding of their mineral resources and the markets in which they are negotiating. Where companies or external partners possess substantially better information, producing countries may struggle to assess the value of an offer or its longer-term implications. Better information would also assist decisions about processing, infrastructure and the selection of investment partners.

The institutional basis for sharing this information matters. A mechanism shaped primarily by consuming countries may reflect their priorities more strongly than those of producers. The dialogue therefore considered the value of broader membership and international legitimacy. Existing international bodies were discussed as sources of institutional lessons, particularly regarding how cooperation could begin with limited functions and develop over time. No single model was endorsed.

Negotiating capacity presents a related challenge. Mineral agreements can combine commercial, infrastructure and financing provisions with implications extending over decades. Governments may negotiate with multinational companies or other states possessing far greater specialist resources. The imbalance can affect their ability to compare options, anticipate risks and secure commitments that can be enforced.

Practical cooperation could help reduce this disadvantage. Producing countries could share legal and technical expertise, compare contractual terms and develop model provisions for recurring issues. Existing experience in legal support and sovereign debt negotiations was raised as a possible source of lessons. The purpose would be to build on accumulated knowledge so that each government does not have to begin afresh when entering a complex negotiation.

Such cooperation need not depend on universal agreement. Groups of interested countries could establish arrangements for sharing expertise and strengthening their negotiating position. This offers a potentially useful route where agreement on a comprehensive global framework remains difficult. Its effectiveness would depend on whether participating governments can access and use the support when decisions are being made.

The dialogue also examined the international space available for value addition. Producing countries may seek to support processing industries through measures that encounter opposition under trade or investment arrangements. The resulting uncertainty can complicate industrial planning. Greater clarity about the scope for development measures could assist governments and investors alike.

Several approaches were considered. Arrangements led by consuming countries may move quickly but give producers limited influence. A comprehensive treaty could provide a broader framework, although negotiating it would be difficult and time-consuming. A further proposal was cooperation among interested countries through a WTO plurilateral arrangement. Areas suggested for consideration included technical assistance, geological cooperation and specified industrial measures of limited duration.

This remained a proposal for exploration. The discussion did not establish that such an arrangement would resolve existing legal constraints or prevent future challenges. Its potential value lay in creating a more predictable basis for cooperation while giving producing countries a stronger role in defining the terms.

Market risk was another area requiring attention. Countries may commit resources to mining and processing in response to strong demand, only to face falling prices or technological changes that reduce the value of their investment. The expansion of production in consuming economies could also alter the opportunities available to existing suppliers. These risks are particularly significant where public finances and employment depend heavily on a small number of commodities.

Historical commodity arrangements were discussed as sources of lessons for possible responses. The question was how mechanisms might help manage instability and support value addition, taking account of earlier experience and its limitations. The dialogue did not propose a fully developed stabilisation scheme. It called for closer consideration of who bears market risk and whether international cooperation could distribute that risk more fairly.

The G20 and T20 could help give these questions political attention and connect them to wider policy discussions. The United Nations was considered well placed to convene countries, support standards and connect institutions, particularly where countries with less market power might otherwise have limited influence.

The approach emerging from the dialogue favoured practical mechanisms addressing identifiable needs. Better information, stronger negotiating support and more predictable conditions for industrial development could improve the position of producing countries. Their participation in shaping these arrangements would be essential to ensuring that international cooperation serves development alongside security of supply.

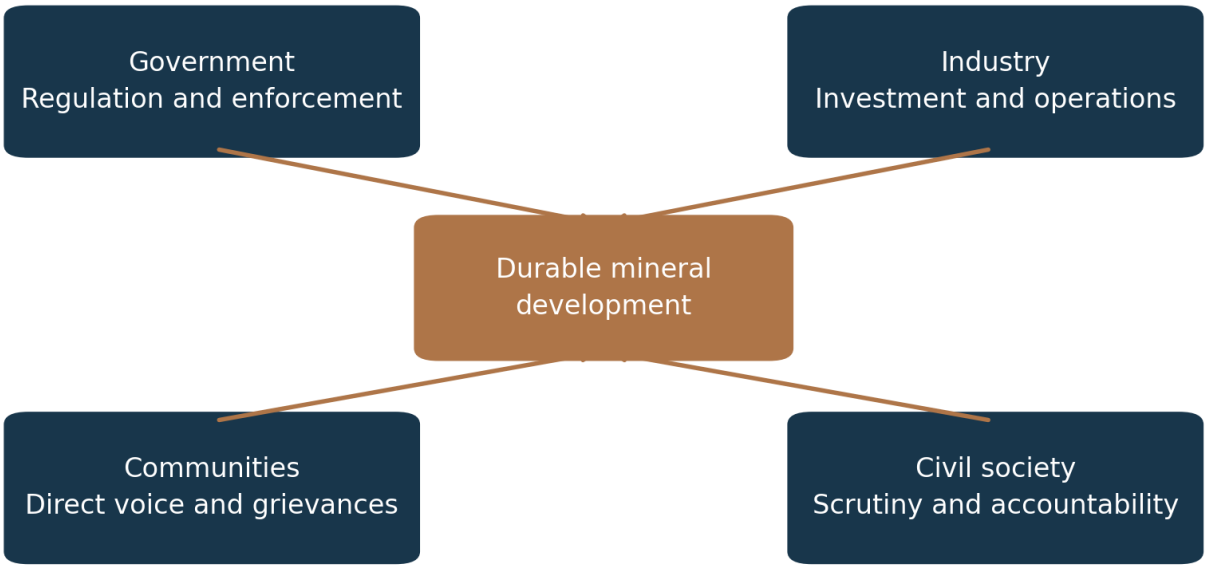
6. COMMUNITY PARTICIPATION AND ENVIRONMENTAL RESPONSIBILITY

The developmental value of critical minerals must also be assessed through their effect on the people and environments surrounding mining and processing activities. Increased investment and export earnings do not, on their own, establish that a project benefits affected communities. The dialogue placed community participation and environmental responsibility among the conditions required for mineral development to command public confidence and deliver lasting value.

A significant concern was whether existing governance arrangements adequately represent communities. Governments, companies and civil society organisations each have a role, but their participation does not necessarily provide a direct voice for those whose lives are most closely affected. Communities have interests and experiences that cannot automatically be represented by institutions speaking on their behalf.

The discussion therefore proposed giving communities a formal place alongside government, industry and civil society. This would recognise community participation as a distinct component of governance. Drawing lessons from existing arrangements in the minerals sector, the proposal sought to address a gap between consultation through representative organisations and the direct involvement of affected people.

Figure 2: Participation in mineral development governance



Conceptual relationship graph summarising the report's proposed direct role for communities alongside government, industry and civil society.

The effectiveness of such participation would depend on how it operates. A formal place in a governance structure needs to be supported by monitoring and credible mechanisms for raising grievances. Otherwise, participation may provide limited influence over decisions or little recourse when commitments are not fulfilled. The dialogue linked the legitimacy of mineral projects to the quality of these relationships and the ability to address concerns as they arise.

This has implications for the durability of investment. Mining requires substantial capital and long commitments, while communities continue to live with its consequences throughout a project's life and beyond. A social agreement that depends on particular political officeholders or temporary understandings may prove fragile. The discussion called for relationships capable of surviving political cycles and supporting a more dependable basis for development.

The experiences considered during the dialogue varied. Some community partnerships had delivered substantial benefits, while others had become channels for rent-seeking. This variation cautions against assuming either that companies are unwilling to develop constructive relationships or that their involvement will necessarily produce good outcomes. Regulatory conditions and the quality of engagement affect what communities ultimately receive.

Environmental responsibility becomes especially relevant as producing countries seek to expand processing and refining. Retaining more of these activities can create economic opportunities, but it also brings additional environmental risks. These consequences need to form part of the assessment of beneficiation. Moving further along the value chain does not remove the need to examine the nature of production and its effects on surrounding areas.

The discussion consequently emphasised domestic regulation and enforcement. Producing countries need the capacity and political commitment to apply their own rules consistently. Civil society, the media and legal institutions can contribute to scrutiny, particularly where public enforcement is weak. Environmental costs left unaddressed may reduce the public benefit from an investment and create liabilities that persist after production ends.

Possible mechanisms for financing environmental liabilities were also raised. Experience from international oil pollution compensation arrangements was discussed as an example of how pooled industry contributions might supplement the resources available when responsible parties cannot meet the full cost of damage. The proposal was exploratory. Its application to mining would require consideration of the relationship between compensation, company responsibility and the limits of liability.

Deep-sea mining arose as a related governance question, although the consultation did not examine it in detail or reach a common position. Its inclusion reinforced the need to assess environmental consequences as mineral strategies expand into new areas.

The broader conclusion was that community confidence and environmental responsibility affect both the public value and the viability of mineral development. Policies intended to increase production and local processing need to address these concerns from the outset. The quality of development will depend partly on whether communities can influence decisions and whether the costs associated with extraction and processing are properly addressed.

7. RECOMMENDATIONS AND CONCLUSION

The dialogue identified several priorities for converting mineral wealth into productive capacity and wider public benefit. These arise from the contributions and exchanges during the consultation and should be understood as proposals for further consideration, rather than a programme formally adopted by participants.

The first priority is to connect beneficiation policies to credible investment strategies. Governments seeking greater local processing need to establish what particular activities require and whether those requirements can be met competitively. Energy, transport infrastructure, technical capacity and finance must form part of this assessment. Export restrictions may influence investment decisions, but their effectiveness depends on the conditions supporting the production they are intended to encourage.

A second priority is stronger cooperation between African producing countries. Bilateral and regional arrangements could combine mineral resources with existing processing capabilities and infrastructure. Cooperation could also help prevent competition for investment from weakening national development objectives. Such partnerships would require clear agreements on the distribution of benefits, recognising the interests of countries supplying resources as well as those undertaking further processing. The same could apply to other regions as well.

Third, producing countries would benefit from better access to information and negotiating expertise. Shared geological knowledge, market intelligence and legal support could improve their ability to assess offers and negotiate complex agreements. Cooperation around model contractual provisions could help governments draw on previous experience. Particular attention should be given to commitments affecting future policy choices, including restrictions on access to alternative buyers and investment partners.

Fourth, mineral strategies should account for uncertainty in technology and demand. Mining and processing investments extend over periods during which markets can change substantially. Decisions should therefore reflect the risks associated with substitution, new production elsewhere and changing manufacturing requirements. International cooperation could give greater attention to how these risks are distributed and whether mechanisms are needed to assist vulnerable producing economies.

Fifth, domestic governance and implementation require sustained attention. Stronger negotiating positions have limited value where governments cannot deliver reliable infrastructure or enforce agreed obligations. Measures to improve institutional capability and address state capture are integral to mineral development. In South Africa, practical cooperation between government, business and social partners could help address the operational constraints identified during the dialogue.

Sixth, affected communities should have a formal role in governance, supported by monitoring and grievance mechanisms. Their participation should be recognised separately from that of

wider civil society. Environmental regulation and arrangements for meeting liabilities also need to develop alongside plans for expanded extraction and processing. Proposed industry-funded mechanisms warrant further examination, including their implications for company responsibility.

Finally, the G20, T20 and United Nations could support cooperation on these priorities. Their contribution could include convening producers and consumers, strengthening access to expertise and advancing discussion on the policy space required for industrial development. Specific mechanisms should be assessed against the problems they are intended to address and the influence they afford producing countries.

Table 3: Proposed mechanisms for international cooperation

NEED	MECHANISM DISCUSSED	QUALIFICATION
Better information	Shared geological knowledge and market intelligence	Institutional design should give producers meaningful influence
Negotiating capacity	Pooled legal expertise and model contractual provisions	Support must be available when agreements are negotiated
Industrial policy space	Explore a WTO plurilateral arrangement	Exploratory proposal; legal constraints remain unresolved
Market risk	Examine lessons from commodity arrangements	No fully developed stabilisation scheme was proposed
Convening and coordination	Engagement through the G20, T20 and United Nations	Assess each mechanism against specific producer needs

Source: *Editorial synthesis of the dialogue as presented in this report. Proposals are not collectively adopted commitments.*

The consultation demonstrated that increased international interest in critical minerals creates an opportunity whose outcome remains open. Producing countries may be able to secure better terms, attract industrial investment and develop new capabilities. Achieving this will require coherent domestic strategies and partnerships that translate commitments into workable projects.

For Africa, cooperation offers a means of connecting resources and capabilities across borders while strengthening the position of participating countries. South Africa could contribute to this effort through its existing expertise and corporate capacity, provided it addresses the domestic constraints affecting its own production.

The central measure of progress will be the productive capacity and public benefit that mineral development leaves behind. Its contribution should be evident in sustainable industries, improved employment opportunities and better living conditions in affected communities. These outcomes will determine whether the present competition for resources supports the broader development ambitions of the countries supplying them.

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NOTES



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The Global South Perspectives Network (GSPN) is an international coalition founded in 2022 by HumanizaCom, the Foundation for Global Governance and Sustainability (FOGGS), and the Inclusive Society Institute (ISI). It connects think tanks and experts from Latin America, the Caribbean, Africa and the Middle East to bring a wider range of Global South perspectives into debates on international affairs and global governance.

GSPN was established in response to the need for stronger Southern representation in the institutions and discussions that shape global policy. Its work focuses particularly on United Nations reform and the future of multilateralism. The network provides a space for experts from different regions to exchange ideas, identify shared priorities and contribute proposals grounded in their own experiences.

Through research, dialogue and advocacy, GSPN seeks to broaden participation in global decision-making. It also promotes more equitable partnerships between the Global South and North, recognising that effective responses to international challenges require the knowledge and participation of countries across both.

Among GSPN's initiatives is the 2023 report *Global South Perspectives on Global Governance Reform*, which was presented at a United Nations workshop in New York. The network has also contributed to international dialogue through events including a United Nations civil society workshop held in Nairobi in 2024.

GSPN's mission is to help ensure that Global South countries participate as equal partners in shaping global policy. By connecting perspectives across regions and bringing them into international discussions, the network works towards a fairer, more inclusive and more sustainable international order.

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