



# Council for Critical Minerals in the Global South

Strengthening South-South and International Cooperation for a Just Energy Transition

May 2025

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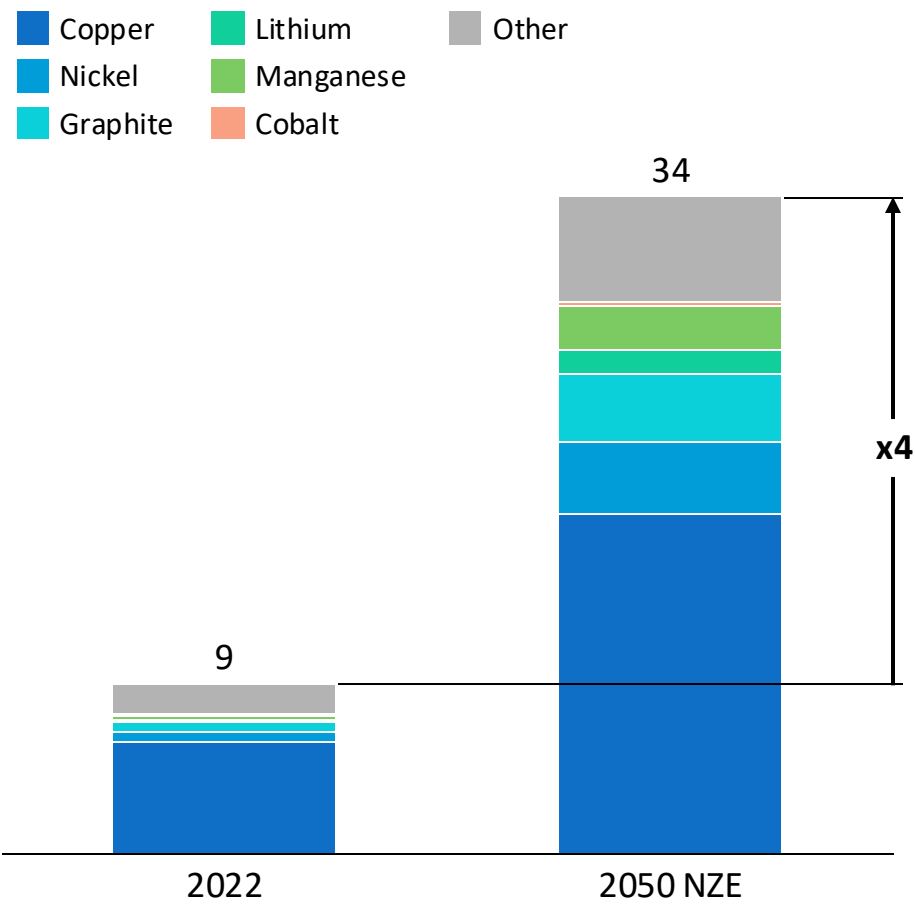
**5 Our approach**

**9 Progress to date on critical minerals programme**

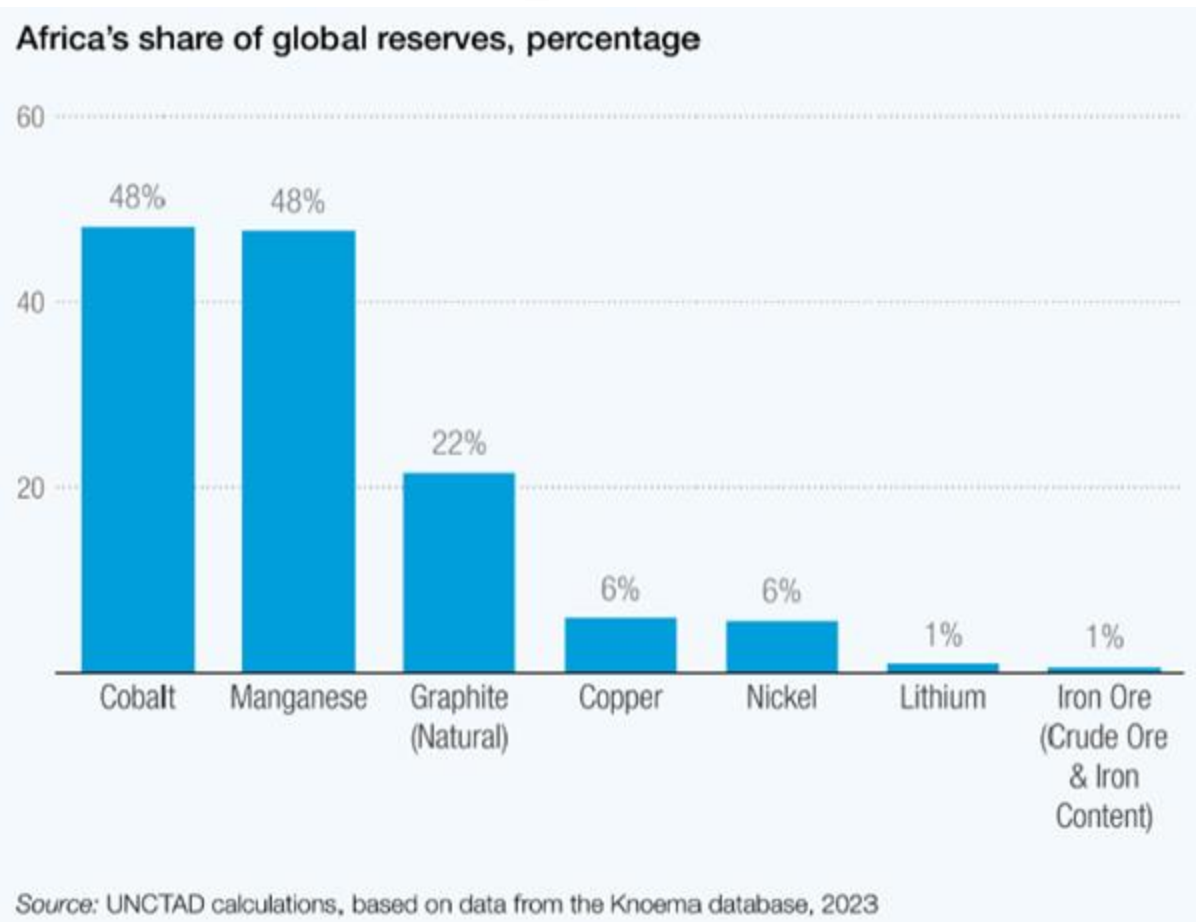
# Demand for critical minerals estimated to increase by 4-fold by 2050; the Global South is well-resourced with several key minerals



Critical minerals demand for clean energy technologies in NZE scenario, Mtons

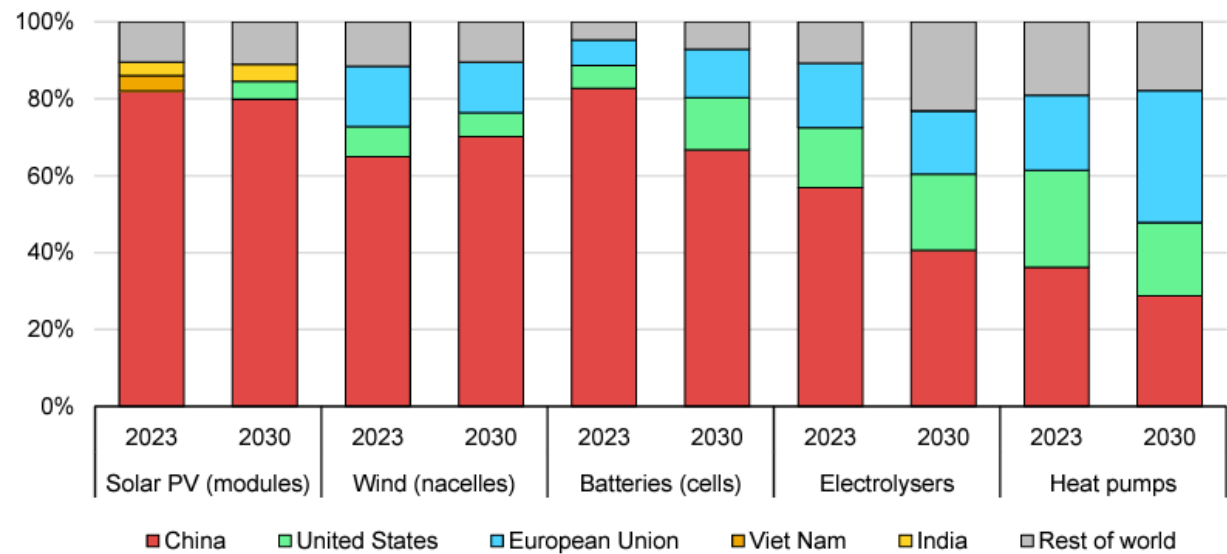


Selected critical energy transition minerals reserves on the African continent



# Industrial policy measures are reinforcing existing manufacturing hubs...

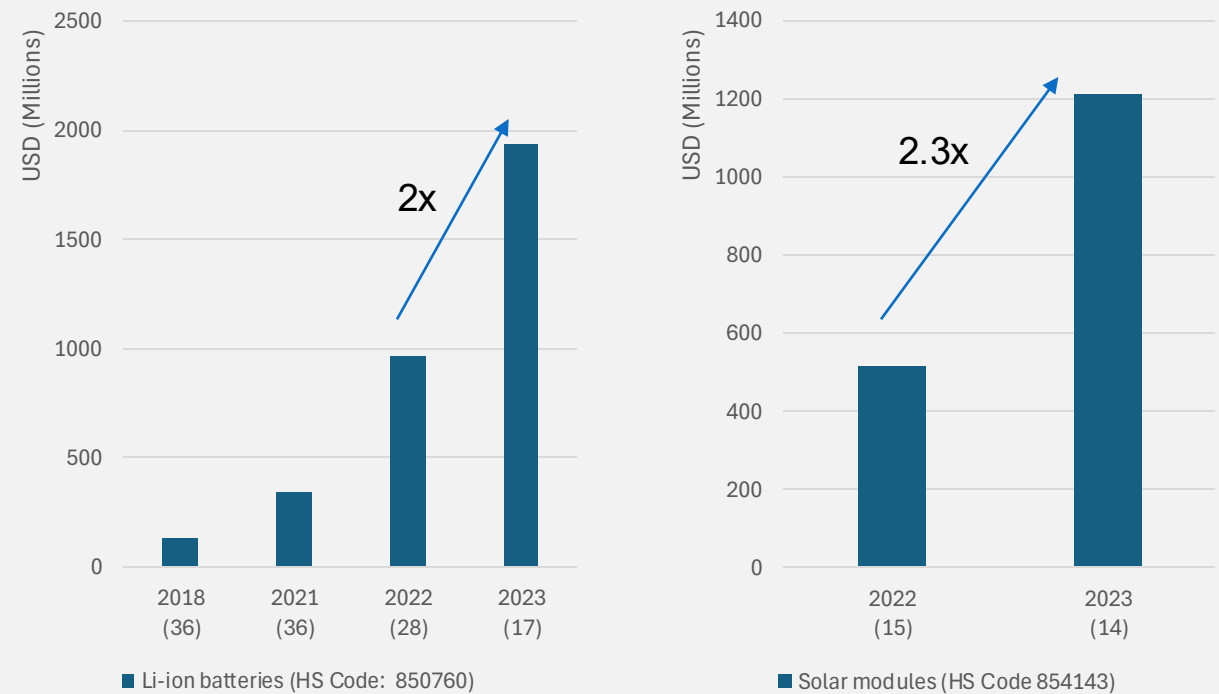
Current and announced manufacturing capacity, 2023-2030



Source: IEA

# ... As the energy transition picks pace, import dependency would grow.

Solar module and lithium-ion battery imports in Sub-Saharan Africa



Source: Analysis based on data from UN Comtrade, Ghana Energy Transition and Investment Plan





# Advancing Green Industrialization for Climate & Just Transition Goals



SEforALL Green Industrialization Hub strengthens regional and country-level efforts to develop local value chains for energy transition technologies, from minerals to manufacturing, in the Global South addressing systemic inequalities



## To unlock value creation opportunities, countries face many challenges...



**Technological gaps** for refining, processing, downstream, recycling and alternate technologies



**Governance and regulatory conditions** for the extractive sector and supply chain expansion



**Data and analytics availability** to enable holistic industrial policy development, strengthen negotiation position, and unlock demand & investments in mining & value chains

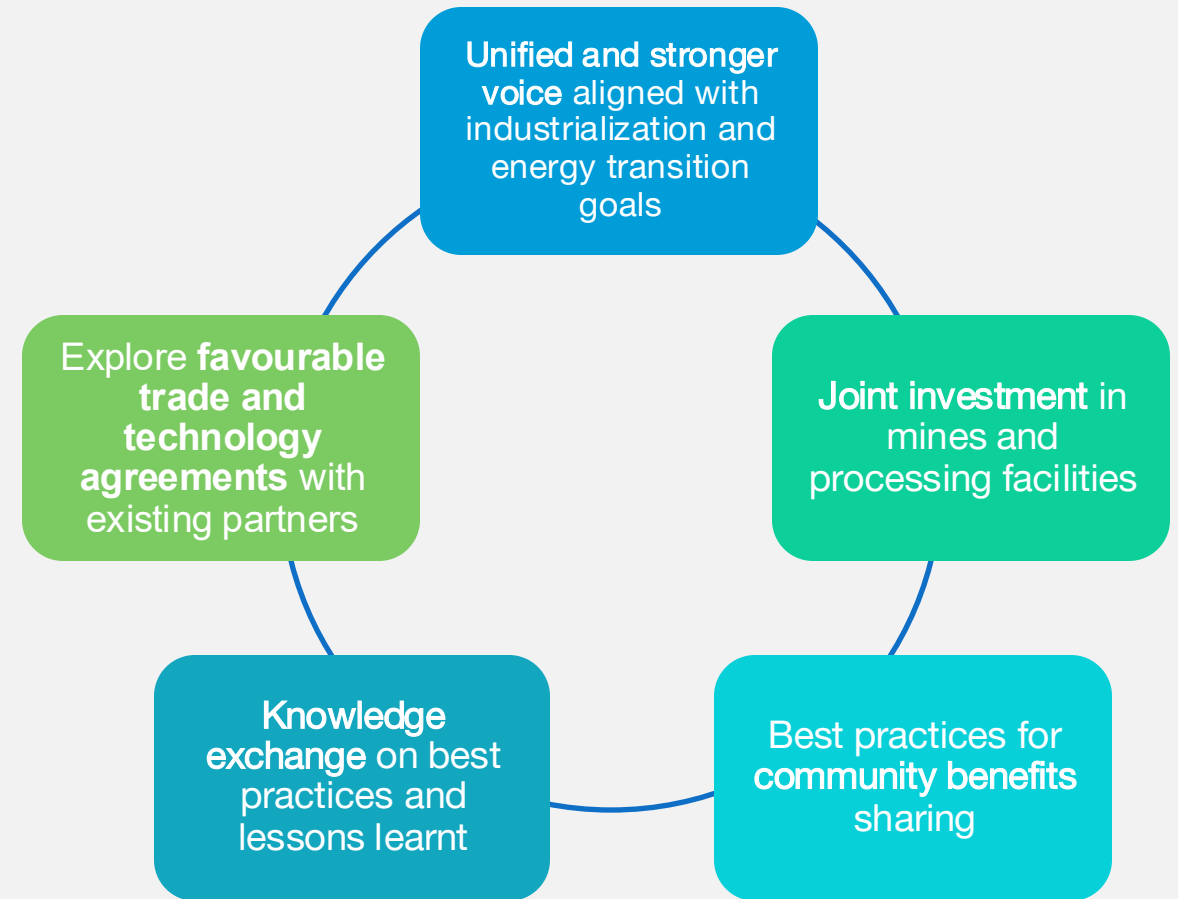


**ESG risks** (e.g., labor standards, adaptation of standards to local conditions)



**Policy and financing gaps** (e.g., complementary policies in trade, R&D, manufacturing, training, and access to concessional capital)

... which South-South collaboration can help alleviate.



A partnership to catalyze south-south and international cooperation and exchange



COUNCIL FOR  
CRITICAL MINERALS  
DEVELOPMENT  
IN THE GLOBAL SOUTH

[www.transitionmineralscouncil.org](http://www.transitionmineralscouncil.org)

PARTNERS



**UC DAVIS**  
Global South Center  
for Clean Transportation  
Institute of Transportation Studies

“

The green energy transition is underway, and Ghana being a country with enormous amounts of critical minerals. Ghana is committed to the highest levels of ESG principles as we look towards carrying out more value addition of these minerals, for the benefit of the country and its people.

**HON. SAMUEL A. JINAPOR**  
Minister of Lands and Natural Resources, Ghana



“

India is working on greater partnerships to carry out greater processing of critical minerals in-country. We have a critical minerals policy that helps India to adhere to ESG principles whether companies are in India or are undertaking activities outside the country.

**VEENA KUMARI DERMAL**  
Joint Secretary, Ministry of Mines, India



“

The Africa Mining Vision that was created 15 years ago is still relevant today. It looks at the entire value chain of minerals, including critical minerals. Four key pillars are being pursued across Africa: Linkages and partnerships; skills and technology; value addition; and mitigating social and environmental impacts. Knowledge sharing is crucial and South-South cooperation is welcome to make the vision a success.

**MARIT KITAW**  
Interim Director, African Minerals Development Centre



“

A balanced approach is needed in critical minerals development. The markets need to be open and transparent and at the same time we need to ensure that green industrialization policies are inclusive. Therefore, South-South cooperation is key if we are to achieve this balanced approach.

**MIHO SHIOTORI**  
Director, Division on International Trade and Commodities, UN Trade and Development



# The Council: Objectives and Pillars of Work



## KEY OBJECTIVES

A Global South-led platform to catalyze efforts on local critical energy transition minerals value chain development by:

- Delivering **state-of-the-art data and analytics** to guide national and regional decision-making;
- Facilitating **south-south collaboration and partnerships** on technology, investments, policy and skills development;
- Building **institutional and technical capacity** on beneficiation technologies and downstreaming opportunities;
- Advancing environmental, social and governance **standards for equitable and inclusive outcomes**; and
- Amplifying a **unified vision and policy approach** for critical minerals in the Global South;

## PILLARS OF WORK

### Data & Analytics



### Collaboration & Partnerships



### Capacity Building



### Global/Regional Advocacy



## THE SECRETARIAT



- Global/regional engagement (e.g. UN, G20)
- Energy transition plans and downstream manufacturing
- Capacity building



- Policy research
- Peer-to-peer and policymaking networks
- ESG aspects of mining



- Mineral supply-demand modeling
- Industrial policy
- Technical and policymaking networks

## CURRENT ADVISORY BOARD\*



**MARIT KITAW**  
UNECA, Former Interim Director,  
Africa Minerals Development Centre



**SUNEETA KAIMAL**  
President & CEO,  
Natural Resources  
Governance Institute



**CLOVIS FREIRE**  
Chief,  
Commodity Research and  
Analysis Section,  
UN Trade & Development

\*onboarding of additional Advisory Board members underway



# The Council: Progress to date



## Country engagement

Ongoing outreach to ↗

Brazil Ghana India Indonesia Nigeria South Africa



- Nigeria
- Uganda
- South Sudan
- Democratic Republic of Congo
- Malawi
- Sierra Leone
- Botswana
- Burundi
- Chad
- Guinea-Bissau
- Liberia
- Somalia
- South Africa
- Tanzania
- Zambia
- Zimbabwe



**Africa Minerals Strategy Group joins the Council for Critical Minerals Development in the Global South**



## Collaboration & Partnerships

### INSTITUTIONAL ENGAGEMENT



**SEforALL and the Africa-Europe Foundation launch partnership on Critical Transition Minerals**

# The Council: Ongoing Activities and Engagements



## Collaboration & Partnerships



Sep'24: UN General Assembly



Sep'24: Roundtable in Indonesia



Nov'24: Roundtable at COP29, Baku



Feb'25: Mining Indaba 2025



May'25: Ministry of Mines, India south-south roundtable



May'25: ASEAN Minerals Development Vision Workshop



## Capacity building



## Data & Analytics

Virtual RoundTable - July & October 2024

### Redefining Community Benefit Agreements for Equitable Critical Mineral Development

South-south exchange on policy design, including auctions and linkages to downstream manufacturing

- Minerals demand-supply assessments – India, ASEAN
- Best practice analysis on community benefits sharing agreements – Global South
- Africa Renewable Energy Manufacturing Initiative (SEforALL) – Botswana, Ghana, Kenya, Nigeria, Senegal, South Africa and Tanzania



# Country and Regional deep-dive: Selected ongoing engagements



## NIGERIA



Data & Analytics



Nigeria Energy Transition Plan



**Ask:** Tailored data and analytics on opportunities for building local value chains for energy transition technologies, especially batteries, leveraging lithium resources.

**Intervention:** Developing a minerals demand-supply model offering insights on projected minerals demand based on existing national plans; resource gaps/surpluses to meet localization targets for batteries; impact of circularity; regional and international cooperation needs on minerals, technology and trade; and skills and benefits mapping.

**Counterparts:** Ministry of Solid Minerals Development, Solid Minerals Development Fund, Africa Minerals Strategy Group

## ASEAN-UK Green Transition Fund



Data & Analytics



Collaboration & Partnerships

**Ask:** Identify opportunities for regional cooperation in green value chain development to advance the ASEAN Carbon Neutrality Strategy and Mining Development Vision.

**Intervention:** Developing a regional minerals demand-supply model to: a) assess the minerals demand associated with the energy transition and impact of circularity; b) identify which AMS can bring what resources, existing industrial base and capacities for a vertically integrated supply chain (e.g. for batteries for EVs); and c) ascertain gaps to be filled through regional and international cooperation around minerals, technology and investment.

**Counterpart:** ASEAN Secretariat



