COUNCIL FOR CRITICAL MINERALS DEVELOPMENT IN THE GLOBAL SOUTH

Africa–ASEAN Exchange on Minerals, Value Addition and Green Industrialization

3–4 December 2026 | Addis Ababa, Ethiopia

Context

Greater cooperation between Africa and ASEAN on minerals and clean technology value chain development is both strategically compelling and economically urgent. Together, the two regions sit atop a remarkable share of the world's critical mineral wealth essential for batteries, electric vehicles, and renewable energy infrastructure, including nickel, tin, cobalt, manganese and graphite. Both regions are increasingly positioning energy transition minerals and downstream industrialization as a strategic pillar to high-value participation in the emerging global clean energy technology value chains. There has been a sharp shift towards policies to attract investments upstream as well as for beneficiation, downstream industries and green industrialization.

ASEAN is currently advancing regional discussions on energy transition minerals, value chain integration, industrial decarbonization, and investment facilitation through ongoing workstreams under the ASEAN Minerals Cooperation Action Plan (AMCAP-IV) 2026–2030 framework, the ASEAN Minerals Development Vision 2045 and related regional initiatives. Parallel efforts are also underway to assess the implications of energy transition pathways on regional minerals demand and supply dynamics. In parallel, African institutions and member states are accelerating efforts to strengthen mineral governance, beneficiation, industrialization, and regional coordination through initiatives such as the Africa Mining Vision (AMV), African Green Minerals Strategy (AGMS), and the African Continental Free Trade Area (AfCFTA), with increasing emphasis on beneficiation, regional mineral value chains, industrialization, local content, technology development and intra-African trade.

While policy ambition is accelerating rapidly and similarly in both regions, what differs is the starting position. ASEAN enters this transition from a stronger manufacturing and investment

base. The region attracted approximately USD 226 billion in FDI in 2024 and already hosts globally significant solar manufacturing capacity alongside emerging battery and downstream mineral industries. However, ASEAN countries continue to face growing pressures around energy efficiency, decarbonization and competition for strategic mineral inputs.

Africa enters from a broader and deeper mineral endowment, albeit alongside persistent investment-risk perceptions, infrastructure gaps and severe energy deficits. The continent hosts an estimated USD 29.5 trillion in mine-site mineral value and attracted USD 97 billion in FDI in 2024. Yet, nearly 600 million people across the continent still lack access to electricity, while unreliable and high-cost power remains a major constraint for mining, mineral processing and downstream industrial development.

Given the growing global importance of critical minerals and increasing interest in resilient and sustainable supply chains, there is an opportunity to facilitate an Africa–ASEAN exchange platform to share experiences, identify common challenges, and explore areas for future dialogue and collaboration. Building on the respective regional strategic visions, this practical and evidence-based dialogue will anchor on what is actually working, what does not and what it will take to integrate value chains, industrial coordination and investment facilitation as the regions advance the implementation of key strategies, aligned with the ASEAN Minerals Development Vision and Africa Mining Vision, respectively.

The exchange will also be informed by the UN Secretary-General's Guiding Principles on Critical Energy Transition Minerals, particularly the imperative that mineral-producing countries and communities capture greater economic value from the energy transition through local value addition, diversification, decent jobs and sustainable and responsible mineral value chains.

Objectives

The proposed in-person exchange aims to:

- Facilitate evidence-based policy, practice and business exchange between African and ASEAN experiences on approaches to minerals development, midstream and downstream manufacturing along solar PV and e-mobility value chains.
- **Benchmark** successful models on policy design, investment mobilization, technology deployment, community benefit sharing and environmental safeguards along the minerals to green technology manufacturing value chain.
- **Facilitate** government and private sector dialogue while exploring commercial partnerships through B2B, G2B, G2G and other joint investment opportunities across the Africa–ASEAN critical mineral value chains.
- **Strengthen** institutional linkages between relevant regional bodies and stakeholders and explore potential areas for future Africa–ASEAN dialogue, technical, investment and trade cooperation.

Outcomes

- A post-exchange synthesis report developed, documenting key lessons and best practices on enabling prerequisites for minerals development and manufacturing.
- Practical priority areas outlined for sustained Africa–ASEAN technical cooperation.
- A concrete investment and trade matrix identifying investible projects and high-priority B2B, G2B, and G2G investment opportunities across Africa–ASEAN mineral value chains.

Programme

Day 1: Building Bridges Towards More Inclusive Minerals-to-Clean Technology Value Chains

Time	Session and Focus	Speakers
08:00–08:45	**Registration and morning networking** Delegate registration, networking coffee, and welcome materials distribution	**Host**: Edwin Wuadom Warden, Senior Officer, Minerals and Green Value Chains, Sustainable Energy for All
09:00–09:10	**Convenors' Welcome** The session sets the rationale for the Africa–ASEAN exchange, its objectives and the outcomes it aims to deliver.	Dr. Marit Kitaw, Economic Affairs Officer, UNECA, Advisory Board, Council for Critical Minerals Development in the Global South Divyam Nagpal, Ag. Head, Energy Planning and Green Industrialization, Sustainable Energy for All (SEforALL) and Co-convenor, Council for Critical Minerals Development in the Global South
09:10–09:40	**Keynote Remarks: Framing the Partnership**	Prof. Erastus Gatebe, Industrialization Secretary, State Department for Industry, Kenya Don Rodney Ong Junio, Head of the Energy and Minerals Division, ASEAN Secretariat Dr. Cosmas Milton Obote Ochieng, Director of the Climate Change, Food Security and Natural Resources Division, UNECA
09:40–10:00	**Family Photo**	

Time	Session and Focus	Speakers
10:00–10:30	**Building Bridges: Delegate Introductions and Icebreaker**	
10:30–11:00	**Regional Outlook: Critical Minerals Landscape in Africa and ASEAN** *Presentations on where Africa and ASEAN stand on critical energy transition minerals (CETM), the supply gaps each region faces, regional strategies and national policies each is pursuing to leverage minerals for green industrial growth.*	Presentations: Don Rodney Ong Junio, Head of the Energy and Minerals Division, ASEAN Secretariat Dr. Marit Kitaw, Economic Affairs Officer, UNECA Audience Q&A
11:00–11:30	**Networking Break**	
11:30–13:00	**Session 1:** **Minerals, Manufacturing, Mobility: What Does It Take for Africa and ASEAN to Build Competitive Battery and E-Mobility Value Chains?** *Rapid growth in global EV markets requires African and ASEAN economies to balance export-oriented battery supply chains with domestic e-mobility scaling across mining, refining, component manufacturing, and assembly. Discussion will explore what it takes for Africa and ASEAN to build competitive battery and e-mobility value chains. Where can both regions play competitive and complementary roles along entry points, required capabilities, and joint investment opportunities?*	Moderator: Edwin Wuadom Warden, Senior Officer, Minerals and Green Value Chains, SEforALL **Scene setting** **Regional deep dive: Africa's Green Minerals, EV Value Chains and Strategic Industrial Nodes** Dr. Marit Kitaw, Economic Affairs Officer, UNECA **Country example: Critical Minerals, E-mobility and Battery Value Chains: Thailand's Policy and Market Development** Kalyaporn Ungsamatkosa, Electric Vehicle Association of Thailand (EVAT) **Discussions** Dr. Pius Victor Chombo, Chairperson, Tanzania Electric Mobility Association Hiten Parmar, Executive Director Electric Mission, Co-founder of the South African Electric Mobility Association (SAEMA) Muchtazar (M.S.), Head of Sustainability, Nickel Industries Limited, Indonesia Francis Penafor, Acting Director, Resource-based Industry, Board of Investment Philippines Denis Gyeyir, Program Manager, Resources Futures in Africa, Open Society Foundations

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		Audience Q&A
13:00–14:00	**Lunch break**	
14:00–15:30	**Session 2:** **Raw Minerals, Clean Power: How Can Africa and ASEAN Collaborate to Deepen Solar PV Supply Chains?** *Record-low prices for imported panels and batteries are accelerating solar deployment today, but risk locking in import dependence rather than building competitive manufacturing for tomorrow. This session unpacks the trade-offs facing both regions and traces how the chain works, from key inputs through to system integration and deployment. Discussion will explore what it takes for Africa and ASEAN to build competitive solar value chains. Where can both regions play competitive and complementary roles along entry points, required capabilities, and joint investment opportunities?*	Moderator: Divyam Nagpal, Ag. Head, Energy Planning and Green Industrialization, SEforALL **Regional deep dive: From Price-Taker to Producer: A Regional Industrial Strategy for Solar PV in Africa** Dr. Vinayak Bhardwaj, Africa Green Industrial Project (AGIP). **Regional deep dive: Advancing Green Industrialization in the Global South: Lessons from Southeast Asia** Faris Abdurrachman, Executive Director and Lead Economist, Industrial Policy Lab Indonesia Discussions: Prof. Erastus Gatebe, Industrialization Secretary, State Department for Industry, Kenya Nguyen Thanh Thao, Head of the Science and International Cooperation Office, Department of Geology and Minerals, Viet Nam Wangari Muchiri, CEO, RE.Think Energy and Advisor, Global Solar Council Adv. Mtho Xulu, Deputy Chairperson, Solar PV Industry Association of South Africa (SAPVIA) Audience Q&A
15:30–15:45	**Coffee break**	

Time	Session and Focus	Speakers
15:45–17:00	**Session 3: Reshaping Global Value Chains: Advancing an Africa–ASEAN Partnership for Mineral-Driven Green Industrialization** Building competitive clean energy value chains puts Africa and ASEAN in direct competition for global industrial capital. Shifting from parallel green industrial ambitions to deliberate cross-regional partnership transforms overlapping goals into a combined industrial force capable of reshaping global supply chains. The panel will examine the strategic imperative for joint action across critical mineral value chains, clean technology, and green industrialization, identifying the complementarities that could connect one region's resources to the other's industrial needs, and the priorities for cross-regional partnership.	**Moderator:** Nqobile Xaba, Program Manager, Resources Futures in Africa, Open Society Foundations **Scene setting** **Critical Minerals and Green Industrialization: A Global South Minerals Framework** Andry Satrio, Head of Industrial and Transport Decarbonization, Institute for Development of Economics and Finance, Indonesia **Panelists:** Dr. Abdulrahman Shaban Mwanga, Commissioner for Minerals, Tanzania Sergey Tulinov, Section Chief, UN Economic and Social Commission for Asia and the Pacific, UNESCAP Engr. Geleni Shalaine P. Bello, Senior Metallurgist, Metallurgical Technology Division, Philippines Malcolm Mazemo, Acting Chief Director of Mining Development, Zimbabwe Audience Q&A
17:00–17:15	**Closing Reflections**	Babatunde Anwo-Ade, Digital Communications Professional (PDDM), UNECA Pavel Tereshchenko, Green Industrialization Officer, SEforALL
19:00–21:00	**Networking Reception**	

Day 2: Turning Binding Constraints into Enabling Conditions through Joint Investments and Project Partnerships

Time	Session and Focus	Speakers
08:00–08:45	**Arrival and networking coffee**	**Host**: Zeinab El-Sayed, Director of Government and Institutional Partnerships, Investing in African Mining Indaba
09:00–11:00	**Session 4: Enabling Conditions I Investment and Trade Roundtable: Unlocking Joint Investment and Trade Partnership for Africa–ASEAN Green Industrialization** A two-part roundtable bringing together development finance institutions, investors, trade bodies and business leaders to explore concrete co-investment opportunities, industry partnerships and South–South commercial partnerships across critical minerals and clean-technology value chains. **Part 1 – Investment (09:00–10:00):** Mobilizing catalytic capital for value addition and clean-technology manufacturing, and practical mechanisms to unlock investment and scale bankable projects in green industries. Key topics include de-risking instruments, blended and co-financing models, infrastructure finance and strategic capital deployment across both regions. **Part 2 – Trade Corridors and Regional Integration (10:00–11:00):** How trade facilitation, market access and regional integration can anchor investment decisions. Discussions will consider existing intra- and inter-regional trade relations, the AfCFTA and ASEAN trade frameworks, development and trade corridors, industrial hubs and special economic zones, trade financing, and the reduction of tariffs and non-tariff barriers on minerals and clean-technology products.	**Scene setting** **Trade and Investment Outlook across Africa and ASEAN Critical Minerals Value Chains,** Clovis Freire Junior, Chief, Extractive Commodities Section, Commodities Branch, UN Trade and Development **Moderator:** Dr. Kwasi Ampofo, Metals and Mining Investment Expert **Part 1 – Investment** **Country example: Philippines,** Francis Penafor, Acting Director, Resource-based Industry, Board of Investment Philippines **Panelists** Jerry Ahadjie, Chief Mining Officer, African Development Bank Francis Penafor, Acting Director, Resource-based Industry, Board of Investment Philippines Portia Appiah, Principal Economist, Mining and Industry, Ministry of Finance, Ghana **Part 2 – Trade and Integration** **Country case:** Mulumba M. Lwatula, Head of Investments (Mining and Energy), Industrial Development Corporation, Zambia **Panelists** Roslyn C. Ng'eno, Senior Investment Expert, Investment Division, AfCFTA Secretariat Nguyen Thanh Thao, Head of the Science and International Cooperation Office, Department of Geology and Minerals, Viet Nam

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		Mulumba M. Lwatula, Head of Investments (Mining and Energy), Industrial Development Corporation, Zambia
11:00–11:30	**Coffee break**	
11:30–12:45	**Session 5: Enabling Conditions II Sequencing Governance Beyond Bans: Industrial Policy, Regulatory Reforms, and Implementation Pathways for Mineral-Based Industrialization** Export bans, quotas, local-content requirements and national and regional value-addition strategies have multiplied across both regions, yet they do not always translate into processing and manufacturing at home. Where they have worked, success has rarely come from the measure alone; it has depended on how governance was sequenced. This session examines what it takes to get that sequencing right: combining smart industrial policy with a deliberate mix of regulatory push (export restrictions, beneficiation and local-content requirements) and pull (fiscal incentives, standards, demand and offtake signals), backed by financing and coordinated state and private-sector support, and integrated across the whole of government so that mining, industry, energy, trade, finance and infrastructure institutions implement in step.	**Scene setting** **Country example: Indonesia's Nickel and Bauxite Industrial Policy Experience,** Faris Abdurrachman, Executive Director and Lead Economist, Industrial Policy Lab Indonesia **Country example: Strategic Critical Minerals, Value Addition and Industrial Growth in Tanzania,** Dr. Abdulrahman Shaban Mwanga, Commissioner for Minerals, Tanzania **Moderator:** Mohamed Stevens, Legal Counsel, Minerals and Energy, African Legal Support Facility **Discussants:** Kalyaporn Ungsamatkosa, Electric Vehicle Association of Thailand (EVAT) Niko Kadjaia, Co-Founder & Chief Executive Officer, TRÍ E mobility, Tanzania Joanne Kiarie, Regional Policy Lead for ESA, Sun King Solar
12:45–13:30	**Lunch break**	
13:30–14:45	**Session 6: Enabling Conditions III: Powering Green Industrialization: Energy Infrastructure for Competitive Processing and Manufacturing** Unreliable and high-cost power remains one of the most binding constraints on mining, mineral processing and manufacturing. This session turns to the hard enablers and constraints, with a focus on energy: reliable, affordable and clean power for	**Moderator and scene setter:** Rushaiya Ibrahim-Tanko, Director, Energy for Growth Hub **Discussants** Engr. Geleni Shalaine P. Bello, Senior Metallurgist, Metallurgical Technology Division, Philippines Mhukululi Ncube, African Minerals Development and Governance expert

Time	Session and Focus	Speakers
	energy-intensive refining and processing; captive and embedded renewables for productive use; grid expansion, interconnection and regional power pools. This panel discussion will compare how ASEAN has powered its industrial zones with the approaches African countries are pursuing to close energy gaps and identify financing and delivery models that can bring competitive power to industrial sites in both regions.	Bimbiriko Barry, Director General of the Strategy and Development Office, Ministry of Mines, Guinea Dr. Mirza Sadaqat Huda, Associate Fellow, ODI / ISEAS-Yusof Ishak Institute, Singapore Vivek Shastry, Associate Director, Energy for Development, Center on Global Energy Policy, Columbia University
14:45–16:00	**Session 7: Enabling Conditions IV Safeguarding Green Industrialization: A Consultation Exchange on ESG** The rapid scale-up of critical-mineral extraction, clean-technology manufacturing and renewable energy deployment is raising the stakes for communities and ecosystems in both regions. Past mineral booms show that weak safeguards and poor benefit sharing can erode social licence, delay projects and undermine the legitimacy of green industrialization. This session will consider how Africa–ASEAN cooperation can avoid these pitfalls and ensure that critical-mineral development and clean-energy industrialization deliver tangible benefits for people and communities. Four group-led discussions will cover community engagement and benefit sharing; environmental safeguards; governance standards; and recycling and end-of-life management of batteries and solar panels as part of a circular value chain. Issue leaders will present syntheses of the key takeaways and priorities for Africa–ASEAN cooperation.	**Moderator:** Charles Wanguwu, Director, Enzi Ijayo Africa Initiative **Issue Framers** Dr. Agatha Siwale-Mulenga, Zambia Program Lead, NRGI (Social safeguards: Community benefit sharing) John Lindberg, International Council on Mining and Metals (ICMM) (Standards) Wen-Yu Weng, Critical Minerals Executive Lead, Ellen MacArthur Foundation (Circularity and recycling) Muchtazar (M.S.), Head of Sustainability, Nickel Industries Limited (Environmental safeguards)
16:00–16:15	**Networking coffee**	
16:15–16:50	**Session 8: Planning Sessions**	**Host:** Theo Adoko, Consultant, UNECA and Zeinab El-Sayed, Director of Government

Time	Session and Focus	Speakers
	Tour de Table: Concretizing Strategic Partnerships and Developing an Africa–ASEAN Partnership Pipeline Drawing on the enabling conditions discussed during the day, the session will identify priority projects, joint investment opportunities and policy and technology exchanges within and across the regions. These will feed into the Africa–ASEAN investment and trade matrix. A Tour de Table on priority opportunities will help agree targeted workstreams, leads, immediate follow-up actions and indicative timelines for a sustained Africa–ASEAN partnership pipeline.	and Institutional Partnerships, Investing in African Mining Indaba
16:50–17:00	**Closing Reflections** Road to COP32: Positioning Africa–ASEAN Cooperation on Minerals-Based Green Industrialization within Africa's Priorities	Don Rodney Ong Junio, Head of the Energy and Minerals Division, ASEAN Secretariat Nqobile Xaba, Program Manager, Resources Futures in Africa, Open Society Foundations Dr. Marit Kitaw, Economic Affairs Officer, UNECA, Advisory Board, Council for Critical Minerals Development in the Global South Divyam Nagpal, Ag. Head, Energy Planning and Green Industrialization, SEforALL and Co-convenor, Council for Critical Minerals Development in the Global South