

Cover Story

LEVERAGE WITHOUT SOVEREIGNTY: AFRICAN BARGAINING STRATEGIES IN THE US-CHINA CRITICAL MINERALS AND AI RIVALRY

Africa occupies a strategically distinct and almost contradictory position in technology rivalry between the United States and China. The continent holds nearly 30 percent of the world's critical mineral reserves and the world's largest reserves of mined cobalt, making it a chokepoint of power over the hardware layer of the artificial intelligence (AI) economy. However, African states remain almost entirely dependent on foreign-owned computing infrastructure, designed chips and cloud platforms, leaving them as rule takers within export-control regimes managed extraterritorially by Washington and Beijing. This paper contests that African states are not pursuing "non-alignment" in its traditional sense but a combination of transactional hedging strategies like beneficiation mandates, supply management, contract-terms bargaining and continental rule-making, whose objective is 'leverage' rather than 'autonomy'. By analysing the Democratic Republic of Congo (DRC) cobalt quota regime, and Zimbabwe's lithium export ban, along with the contested build-out of African AI data centres, the paper assesses where this approach has been able to give favourable gains, and where it has produced new dependencies. It concludes that the binding constraint is not African bargaining skill but the absence of collective action: leverage exercised nationally is often priced by markets as risk, while leverage exercised continentally could be pitched as power.

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Introduction: The Two Asymmetries

The United States and China have decoupled their technology stacks, which has transformed supply chains into security architectures. Price alone does not determine the flow of semiconductors, high bandwidth memory, model weights, GPUs, and the minerals that are used in their development. They are now governed by licensing regimes, tariffs, strategic partnership agreements, and entity lists. For African states, this change has created two different and contradictory asymmetries.

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The first dimension of this asymmetry is that Africa supplies the physical substrate of the AI build out such as lithium, copper, cobalt, manganese, platinum-group metals, tantalum and rare earths.¹ For instance, The Democratic Republic of the Congo (DRC) dominates mined supply with a 73% market share.² Anxiety among the great powers regarding supply security has made this endowment strategically and not just commercially valuable.³ This makes Africa's mineral endowment strategically valuable.

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However, the other side is deeply unfavourable. Africa does not manufacture these advanced systems, has a negligible share of global data centre capacity, and cannot access frontier computing except through the channels of the United States or Chinese vendors, or state linked firms.⁴

When the US Bureau of Industry and Security (BIS) or China's Ministry of Commerce (MOFCOM) makes rules determining which chip will land in what continent and on what conditions, Africa does not get to be on the table. It does not get to decide its fate despite supplying the foundational minerals. This raises a central question: can Africa's upstream mineral leverage be converted into downstream technological standing, or will it merely reprice African exports without changing the continent's position in the value chain?

Conceptual Framework: Non-Alignment 2.0 as Transactional Hedging

The doctrine of non-alignment emerged during the Cold War and was premised on abstention from formal alignment with the major power blocs, as articulated through the Non-Aligned Movement (NAM) by third world countries. What African states are pursuing today, or moving towards, is not non-alignment in its traditional sense. It is different in three main aspects and is best understood as "transactional hedging".

First, it is not systemic but sectoral. Any African state may accept American cloud services, Chinese telecommunications infrastructure, Emirati data centre capital or European mineral partnership finance all at the same time, treating each of these as individual negotiations and deals rather than an act of alignment. Nigeria hosting both Nvidia⁵ powered facilities, and Huawei⁶ financed AI data centre capacity is not a case of incoherence, but of diversification.

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Second, it is instrumental rather than ideological. Neutrality or moral position is not the objective. It is the preservation of exit options, which is the only bargaining option available to a state which is structurally on the weaker side in an asymmetric relationship.

Third, and most importantly, it operates under the conditions of “weaponised interdependence”. The assertion by Farrell and Newman that any state that sits at the topological centre of a network can convert that position into coercive power, now applies in both directions.⁷

The United States displays this through its Foreign Direct Product Rule, which has effective global reach in advanced chips.⁸ China has also started to follow suit. The MOFCOM notices of 9 October 2025 asserted extraterritorial jurisdiction for the first time, mandating licenses for transfers of controlled rare-earth materials “between third countries”, and introducing a de minimis content threshold for foreign made goods. The strategic implications of this for African states are unfavourable. They might generate chokepoint power at the mine, but at the same time they are also subject to the chokepoint power at the chip, the model, the refinery and the tool. Hedging therefore is no longer a preference but a necessity.

The Instruments of Great Power Pressure

The American toolkit: conditionality and controls

The United States has increasingly shifted from a grants and aid-oriented approach towards transactional commercial diplomacy. Three key instruments matter.

Export Controls: The Framework for Artificial Intelligence Diffusion, released in January 2025, instituted a global licensing scheme for advanced computing chips and certain AI model weights that puts the U.S. and eighteen of its partners in the unrestricted top tier.¹⁰ Critics of the Framework noted that it creates a scarcity of advanced chips for around 150 middle-tier countries.¹¹

In May 2025, Department of Commerce rescinded the rule just days before it was to go into effect.¹² While department has not issued the frame work, a draft of the revised Framework was scheduled for review in February 2026 and withdrawn in March.

The non-enforcement announcement continues to cite the original Framework, which has been officially published in the Code of Federal Regulations.¹³ The GAO ruled on 12 May 2026 that the non-enforcement announcement was a rule and was not submitted to Congress, therefore, remaining in effect. Draft Frameworks reportedly license the volume of computing power and would implement a significantly lighter review below 1000 of the most advanced GPUs, while upper tier licenses may include site visits.¹⁴ For most African countries, the main effect of the Framework is regulatory uncertainty; several of these countries are on the most restrictive D:5 arms embargo list.

Trade preference volatility: The African Growth and Opportunity Act lapsed on 30 September 2025 and was retroactively reauthorised through December 2026 under the Consolidated Appropriations Act, 2026.¹⁵ Despite this, the benefits were largely overridden by reciprocal tariffs of 10 to 30 per cent imposed under emergency economic powers, and by Section 232 sectoral duties.¹⁶ The exports of AGOA covered goods marked a sharp decline, while South African vehicle exports to the United States fell to three quarters of their 2025 level.¹⁷ For

many African governments, this reinforced the perception that access to the US market is discretionary and potentially short-lived.

Minerals conditionality: The US-DRC Strategic Partnership Agreement signed alongside the Washington Accords with Rwanda creates a Strategic Asset Reserve for certain minerals and gold with provisions for preferred access for US companies¹⁸, links investment to the Sakania-Lobito corridor¹⁹, and sets targets for Congo to route the majority of its copper, zinc, and cobalt to Angola via the Atlantic instead of the east. Washington hosted Critical Minerals Ministerial in February 2026²⁰ and invited about 50 states to attend and paired it with an EXIM backed strategic reserve initiative.²¹ This is industrial policy expressed as foreign policy: access to capital and offtake to change the supply chain away from China.

The Chinese Toolkit: incumbency and materials

China's principal advantage is its incumbent position within Africa's infrastructure and technology system. More than fifty African states, as well as the African Union, have signed Belt and Road Agreements²²; in which Huawei alone has built nearly 70 per cent of Africa's 4G infrastructure, with financial backing from policy banks at prices that were impossible to match by Western vendors.²³ This incumbent position is increasingly extending into emerging AI infrastructure: a \$400 million data centre agreement with Huawei in Lagos expanding cloud and AI partnerships with national telecom operators²⁴, and Chinese built lithium processing plants in Zimbabwe.²⁵

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Beijing has clubbed this with commercial inducement like zero tariffs extended in 2026 to all 53 African states, and covering approximately 9,000 tariff lines with material leverage.²⁶ China now has effective control over the processing of a number of critical materials. It can and will use this control to try to achieve some diplomatic objectives. China's significant control over the global supply of rare-earth metals (with a processed output estimated at 85-90% of the world's supply) gives it the ability to pursue specific foreign policy goals. It is using these diplomatic measures during a pause in the negotiations scheduled to end in November 2026.²⁷

The trade and commercial imbalance are increasing. During the first quarter of 2026, China-Africa trade was \$92.3 billion, a 27.1% increase from the previous year. Chinese trade deficits with Africa reached an all-time high of \$29.1 billion.²⁸ Zero tariff access has not been implemented to balance trade; instead, it is being used to restructure the market.

Case Studies in Leverage

The DRC: From Price Taker to Supply Manager

The DRC's 2025 cobalt intervention marked a significant shift from being primarily a price taker to actively managing global supply. After cobalt hydroxide prices fell to around

US\$5.60/lb in February 2025, Kinshasa imposed an export ban and later replaced it with an ARECOMS-administered quota regime extending to 2027. The effect was substantial: cobalt hydroxide prices rose by 328 per cent during 2025, while cobalt metal and sulphate prices increased by 130 per cent and 266 per cent, respectively. Importantly, this price recovery was driven less by stronger demand than by restricted access to Congolese material. Although the global market remained in nominal surplus, the effective ex-DRC market moved into deficit as cobalt accumulated inside the country and overseas inventories tightened. In this sense, the DRC demonstrated that a dominant producer could influence global prices by controlling export availability rather than reducing production itself.²⁹

There are, however, clear limits to this leverage. Administrative delays in implementing quotas and export procedures created uncertainty, while persistently high prices could accelerate substitution towards lower-cobalt battery chemistries. More fundamentally, the DRC's influence remains concentrated at the upstream stage: around 72 per cent of Congolese mined cobalt in 2025 came from Chinese-majority-owned assets, while China accounted for about 79 per cent of global refined cobalt output. The DRC is therefore becoming a higher-leverage supplier of raw and intermediate cobalt, but it still lacks comparable control over refining and downstream battery manufacturing. Its growing market power is real, but incomplete.³⁰

Zimbabwe: beneficiation as industrial strategy

Zimbabwe has opted for a complementary strategy of requiring value addition. Following its 2022 ban on exports of raw lithium ore, the government announced that exports of lithium concentrates would also be prohibited from January 2027³¹, and issued a ban on unprocessed mineral exports on 25 February 2026.³² The rationale for the ban is defensible. In 2025, Zimbabwe exported 1.128 million tonnes of spodumene concentrate (a volume increase of 11 percent) and recorded no increase in earnings from the exported volumes which were in the range of \$514 million, indicative of a raw material commodity trap.³³

The end result is paradoxical. The lithium sulphate plants built to comply with the beneficiation requirement are largely built and owned by the same Chinese companies - Sinomine, Huayou, Yahua, Chengxin - whose vertically integrated conversion plants that the policy aims to displace.³⁴

Value addition therefore occurs in Zimbabwe but remains largely within Chinese corporate structures. Beneficiation mandates relocate processing without changing ownership, and the control remains critically important for transfer of technology. An additional concern comes from the Natural Resource Governance Institute's research. It suggests that Ghana could be losing a lot of money by pursuing domestic lithium processing, as small, high-cost refineries could be value-destroying.³⁵

Compute: The Kenyan refusal and the sovereignty vocabulary problem

The downstream scenario, however, is one of dependence being negotiated rather than being escaped. The Cassava Technologies partnership with Nvidia, often regarded as one of the

flagship AI projects on the continent³⁶, involves roughly a \$700 million investment, with 3,000 GPUs to be established in South Africa in 2025, with further plans to scale it towards 12,000 GPUs across Egypt, Nigeria, Kenya, and Morocco. Though the hardware, software, and reference architecture remain American³⁷, the sovereignty here means only jurisdictional control over data and workloads, not independence from the supply chain.

Moreover, a more revealing fact comes from Kenya, where the \$1 billion Microsoft-G42 project did not proceed beyond the proposal stage due to Nairobi's refusal to guarantee the annual purchase commitments that the sponsors initially sought. An African state with almost no AI infrastructure chose no deal over a bad deal. It shows that African countries now consistently see these compute agreements not as gifts but as contracts to be negotiated. Along with national policies, a parallel evolution in the continental policy landscape is also visible. The African Union's Continental AI Strategy, rolled out in 2024 and extending to 2030, initially focused on developing governance institutions, supporting national AI strategies, and building technical capacity.³⁸ Its main purpose was to outline a common framework for African nations engaging with external partners. The AI strategy also complements the Africa Green Minerals Strategy, adopted in February 2025, which presents local value addition as a continental goal.³⁹

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Analysis: Four Strategies, One Missing Condition

The responses from African countries can be grouped into four different categories that differ in both ambition and impact.

First is supply chain management. By controlling the supply chain, African nations seek to influence the global market. This is reflected most clearly in the Democratic Republic of Congo's restrictions on cobalt exports. However, this approach has a downside, as these policies may encourage customers to diversify away from affected producers. Beneficiation requirements are another response coming from African countries. They require minerals to undergo domestic processing before export. While this may encourage investment in domestic capacity building and industrial development, its implementation heavily relies on the availability of energy, infrastructure, and skilled labour in the particular country.

Regional approaches to computing infrastructure are likely to prove more viable than purely national initiatives. Shared AI facilities supported by regional institutions such as the African Development Bank could achieve economies of scale that individual countries would struggle to finance on their own. On the other hand, electricity infrastructure remains a fundamental requirement for both beneficiation and AI development. Accordingly, investments in projects such as Grand Inga, geothermal generation within the Rift Valley, and electricity sector reforms in South Africa should therefore be viewed as components of digital and industrial strategy rather than solely as energy policy.

The interaction between the United States' Foreign Direct Product Rule and China's rare earth export regulations has become an increasingly important consideration for investment planning. African governments should therefore assess prospective supply chains against both United States and Chinese export-control frameworks. Policy harmonisation regarding AI investment is therefore strategically important and should be treated as an economic asset in its own right. A Pan-African framework governing AI, digital data, and mineral investment would reduce compliance costs for investors while strengthening Africa's collective negotiating position.

Conclusion

The recent developments show that African countries have acquired greater leverage in negotiating over strategic minerals. These include export restrictions in the Democratic Republic of Congo, which influenced international cobalt markets, Zimbabwe altering global lithium supply chains through export controls, and Kenya demonstrating a willingness to reject investment proposals that did not meet domestic policy objectives. However, greater assertiveness in bargaining should not be equated with autonomy. Much of Africa's cobalt continues to be refined outside the continent, processing infrastructure remains largely in foreign hands, and access to AI hardware is still controlled by licensing decisions that are usually made outside the continent. Although African nations have negotiated more favourable terms in recent AI deals, the structural organisation of strategic minerals has changed relatively little. The long-term significance of these policies therefore depends on whether fragmented and disparate national initiatives will transform into coordinated continental action.

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