

CRITICAL MINERALS ROUNDTABLE

CANADIAN & AFRICAN RELATIONS AMID A SHIFTING WORLD ORDER

November 4, 2026

8:00 - 12:00pm EST | 1:00 - 5:00pm GMT | 2:00 - 6:00pm WAT | 4:00 - 8:00pm EAT

The **Balsillie School of International Affairs** (BSIA) in Waterloo, Ontario, is hosting a series of virtual roundtables to rethink and reconstitute Canadian and African relations in light of the shifting global order. The three roundtables will be on Critical Minerals, Digital Sovereignty, and Food Value Chains and Food Security. The virtual roundtables will bring together leading African and Canadian scholars, policymakers, and thought leaders to discuss several key issues we believe are at the heart of a new agenda.

The first roundtable will focus on the development of **Critical Minerals Supply Chains** and will be held on **November 4th, 2026**, from 8:00 - 12:00 pm EST.

We hope you will join us for this important and timely discussion, the outputs of which we will share with individuals in the federal government considering new pathways for international engagement with Africa.



BALSILLIE SCHOOL
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Executive Summary

Amid rising protectionism and fragmentation in the global economy, interest in Africa is growing, driven by its hold on an estimated 30% of the world's critical minerals reserves and its position at the epicentre of the fourth industrial revolution. With this revolution and the global economy's decarbonization in response to the triple planetary crisis of climate change, biodiversity loss, and pollution, the race for critical minerals is at an all-time high. At the same time, these minerals are also needed for producing modern armaments. Nearly 80% of US military hardware relies on critical minerals for its composition, integrity, and operation. With the global energy transition underway, such critical minerals are indispensable to the next global economic transformation, rapidly replacing fossil fuels as the most sought-after natural resources.

Canada's major focus beyond its borders has been through its membership in the G7 Critical Minerals Production Alliance, established in June 2025, aimed in part at countering Chinese domination. In October 2026, Canada and Australia signed a Joint Declaration to collaborate on promoting secure, diversified, and resilient critical minerals supply chains. At the G7 Leaders' Summit, Canada expanded the critical minerals agreement and renamed it the Minerals Resilience and Production Alliance. The absence of any systematic Canadian linkages to African critical minerals, either as an extension of the critical minerals alliance or through bilateral agreements, is striking. It is also problematic to include the United States, which is reported to be low on critical minerals reserves for military purposes, leveraging punishing tariffs to improve access to Canadian critical minerals and is busy striking bilateral agreements with individual countries on the continent.

For decades, African countries have found themselves still relying on colonial-style extraction where they are on the lowest ring of the international value chain as exporters of unprocessed raw materials, generating few jobs and subject to volatile prices. The global competition to access critical minerals provides an opportunity for the continent to demand greater processing and to build value chains that enable green manufacturing. There has been some movement in this direction. Between 2023 and August 2026, 15 African countries put in place quotas or restrictions on the export of raw minerals like cobalt, manganese and lithium, which at least generates first-stage processing. Still, 96% of exports are either in the form of raw or semi-processed ores or concentrates. As a result, the continent captures a tiny percentage of the value added created through value chain production. Take the area of clean energy. The continent provides 75% of the manganese and cobalt and nearly 20% of the world's copper that are essential inputs to the production of clean energy technologies and related components but receives only 1% of the value generated from their manufacturing.



Executive Summary

Analysts from Queen's University's Centre for International and Defence Policy argue that supply chain "security" is incomplete without addressing issues like local governance, community consent, and value addition. However, Canadian security should not be the only goal. Interventions that build value chains aimed at structurally transforming the continent away from extraction are, in themselves, a vital goal for deepening trade and other economic relations with the continent. This is particularly important as African countries need goods to help the continent adapt to climate change through green manufacturing while participating in global clean energy value chains in line with Africa's Green Minerals Strategy. This should also be seen through the lens of working with the continent on alternatives to resist hegemonic efforts by some countries, like the United States, to pressure African countries for unfettered access to their critical minerals.



Session Themes

Session 1: International Relations and Opportunities: Understanding the Constraints on Supply Chains and Strategic (Re)Alignment: Identifying shared mineral priorities, complementary assets, and points of competition. What would a durable partnership need beyond securing access to raw materials?

- What are the strategies and goals of the international players securing access to African critical minerals, and what are the connections to Canadian activities and interests on the continent?
- How do these international players and agreements with African governments limit the opportunities to transform critical mineral strategies on the continent, and which minerals and supply-chain segments offer the strongest opportunities for Canada-Africa cooperation?
- What are the constraints and opportunities for cooperation created by ongoing Canadian critical mineral alliances?

Session 2: From Extraction to Value Addition: Moving beyond raw export toward local beneficiation and processing; technology transfer and skills development; what it would take for Canadian investment to support African value-addition ambitions rather than replicate extractive patterns. Industrial policy and the economics of moving up the value chain.

- What specific policy or investment conditions would make it commercially viable to process minerals in Africa rather than export them raw, ensuring the value-add for African countries?
- Where are the gaps in the African value chain where Canada could play a role, and how could that be structured or incentivized?
- What are the infrastructure constraints that exist in terms of processing capacity, digital systems, energy, and transport that could limit any value addition in critical minerals, and how can they be overcome?

Session 3: Governance, Communities and the Just Transition: Security governance and community consent around mining operations; transparency and accountability for public/private security providers; treating African governments and communities as governance partners rather than suppliers; environmental and social safeguards. The extent to which critical-mineral security can be reframed as a governance and legitimacy challenge and a supply-chain challenge; Land rights, Indigenous and customary authority, resettlement, and benefit sharing. Risk assessment of displacement, biodiversity loss, and unequal exchange.

1. What does "supply chain security" mean if a project is efficient but socially and environmentally contested by the communities hosting it? How / should this contestation be mitigated?
2. How can we ensure that the benefits of mining accrue to local communities and miners, including artisanal and small-scale operations?
3. What concrete mechanisms would ensure African governments and communities participate in critical minerals governance as well as accountability of security operations as equal partners rather than as suppliers of last resort?

Agenda

Time	Activity
8:00 - 8:30 am EST	Welcome & Introductions by Dr. Ann Fitz-Gerald & Chair Dr. Howard Stein
8:30 - 9:30am EST	Session 1: International Relations and Opportunities: Understanding the Constraints on Supply Chains and Strategic (Re)Alignment
9:30 - 9:45am EST	Break
9:45 - 10:45am EST	Session 2: From Extraction to Value Addition
10:45 - 11:00am EST	Break
11:00 - 12:00pm EST	Session 3: Governance, Communities and the Just Transition:
12:00 - 12:15pm EST	Closing Remarks