ETTG | European Think Tanks Group

The European Think Tanks Group (ETTG) is a network of European independent think tanks working on EU international cooperation for global sustainable development
www.ettg.eu

Sailing in Lightning: An Interest-Driven Europe–Africa Partnership in Mobility, Peace and Industrial Transformation

ETTG Collective Report 1/2026
November 2026

Coordinators of the Report:
Iliana Olivié and Daniele Fattibene

Contributors:
Adrien de Bassompierre, Ayman Adel, Damien Barchiche, Darlington Tshuma, Despoina Damianidou, Dora Meredith, Elisabeth Hege, Ettore Greco, Hamza Saidi, Ibrahima Kane, Iliana Olivie, Inès Auriol, Inge Poelemans, Isabelle Ramdoo, Jeggan Grey Johnson, Jessica Hagen Zanger, Jide Okeke, Jolita Pons, Julian Bergmann, Karim Karaki, Linda Oucho, María Santillán O'Shea, Mariana Camelo, Mariem Dkhil, Marta Driessen, Nargis Kassenova, Niels Keijzer, Nouzha Chekrouni, Rim Berahab, Roslyn Ng'eno, Sabrine Emran, San Bilal, Sebastien Treyer and Veronica Bolton Smith.

KEY MESSAGES

Marking 26 years since the inaugural Cairo Summit, the Africa–EU partnership stands at a pivotal moment shaped by demographic realities, geopolitical shifts and evolving security challenges. To unlock the full potential of this bi-regional relationship, both Unions must navigate complex multi-alignment strategies and directly address diverging agendas.

Mobility and Skills Development

- Shift the bilateral narrative away from security-focused migration control toward streamlined, legal mobility pathways that address mutual demographic and labour needs while mitigating political polarisation, administrative friction and brain drain risks.
- Expand legal pathways through co-financed Global Skills Partnerships, standardised qualification frameworks and ethical recruitment practices that protect vital African sectors (e.g., healthcare) from talent depletion.

KEY MESSAGES (CONTINUED)

Peace and Security

- Reorient security frameworks away from purely military interventions toward tackling governance failures, economic exclusion and climate degradation as primary drivers of instability.
- Balance rapid bilateral defence agreements with broader multilateral frameworks – such as the African Peace and Security Architecture – while using pragmatic diplomacy to engage military regimes without legitimising unconstitutional rule.
- Revisit tools like the European Peace Facility to avoid bypassing regional frameworks, which weakens trust and coordination, and adopt a holistic approach that respects the imperatives of the AU Peace and Security Council.

Economic Development & Industrialisation

- Accelerate clean industrialisation by transitioning from raw, unprocessed critical raw material extraction to local value creation, while resolving regulatory friction and addressing competitive gaps with external actors like China.
- Scale sustainable industrial partnerships by closing Africa's energy and logistics deficits, expanding pilot projects into regional pipelines and improving overall investment governance.

Cite as: Olivié, I., Fattibene, D. (eds), Sailing in Lightning: An Interest-Driven Europe-Africa Partnership in Mobility, Peace and Industrial Transformation, ETTG Collective Report 1/2026, Brussels, 2026

TABLE OF CONTENTS

EXECUTIVE SUMMARY 4

1. RE-IMAGINING EU–AFRICA MOBILITY AND SKILLS PARTNERSHIPS 5

2. STRENGTHENING THE EUROPE-AFRICA SECURITY ARCHITECTURE 9

3. A 'NEW' ECONOMIC DEVELOPMENT: CLEAN INDUSTRIALISATION AND THE PIVOTAL ROLE OF CRITICAL RAW MATERIALS 12

CONCLUSIONS 17

REFERENCES 18

LIST OF PARTICIPANTS 20

EXECUTIVE SUMMARY

The partnership between the European Union (EU) and Africa stands at a transformative moment, shaped by demographic realities, shifting geopolitical alignments and evolving security pressures across both continents. Recent regional crises – ranging from the war in Ukraine to a fragile transition in South Sudan and the ongoing conflict in the eastern Democratic Republic of the Congo – have underlined the inadequacy of traditional donor-recipient paradigms, signalling an urgent need for pragmatic, interest-driven collaboration. As both continents are middle powers that navigate complex multi-alignment strategies in a changing global order, building a resilient alliance requires creating shared rules and matching national strategic priorities with common regional goals to effectively engage in international partnerships.

Drawing from the discussions of a joint event convened by the European Think Tanks Group (ETTG) and the Policy Center for the New South (PCNS) in Rabat in early July 2026, this collective report presents a concise blueprint for building an equitable, interest-driven collaboration across three main areas: i) mobility and skills development, ii) peace and security and iii) economic development and industrialisation, with a focus on Critical Raw Materials (CRMs). It builds on and significantly expands the findings of a previous publication (Olivié et al., 2025), that focused on how to strengthen the partnership between the Pan-African Parliament and the European Parliament.

On human mobility, both regions must create decent job opportunities in Africa, but also have a great chance to pragmatically bridge Europe's labour deficits with Africa's expanding youth workforce, which cannot be fully absorbed internally. This can be pursued via structured skills partnerships, ethical recruitment standards and systemic administrative modernisation. The polar opposites of the age structures of the two continents couldn't be more acute. Europe has a rapidly aging population – a median age of 44.9 years in 2025 with a working-age population projected to drop significantly by 2050. On the other hand, Africa's youth demographic is bulging with nearly 70% of the population under 30. These statistics present a demographic mismatch. But they also are an opportunity for strategic economic cooperation. While demographic dynamics point toward an organic complementarity between an aging European labour force and a young African workforce, politically charged rhetoric and fragmented administrative policies continue to obstruct such mutually assured leverage of turning the labour markets into assets for both sides' legal mobility channels.

> The polar opposites of the age structures of the two continents couldn't be more acute. Europe has a rapidly aging population – a median age of 44.9 years in 2025 with a working-age population projected to drop significantly by 2050. On the other hand, Africa's youth demographic is bulging with nearly 70% of the population under 30. These statistics present a demographic mismatch. But they also are an opportunity for strategic economic cooperation.

On peace and security, joint interventions must move past fragmented military responses to tackle structural drivers of conflict, including governance deficits, political power dynamics, climate insecurity and critical mineral exploitation, while restoring multilateral governance frameworks. Participants noted that this is key to avoiding repeating past mistakes in other global scenarios (e.g., Afghanistan), where pouring billions into reconstruction and development did not result in more peace and security. On the one hand, there is still mistrust towards the newly created European Peace Fund, which could bypass and undermine the centrality of the African Peace and Security Architecture (APSA). On the other hand, it is time for a reset and a more transparent process to reform the APSA. While security challenges in Europe and Africa remain closely linked, past security interventions have over-emphasised military responses at the expense of local governance, conflict prevention and structural economic resilience. Realigning the EU–Africa agenda requires addressing domestic political constraints while operationalising commitments into concrete policy outcomes for both regions.

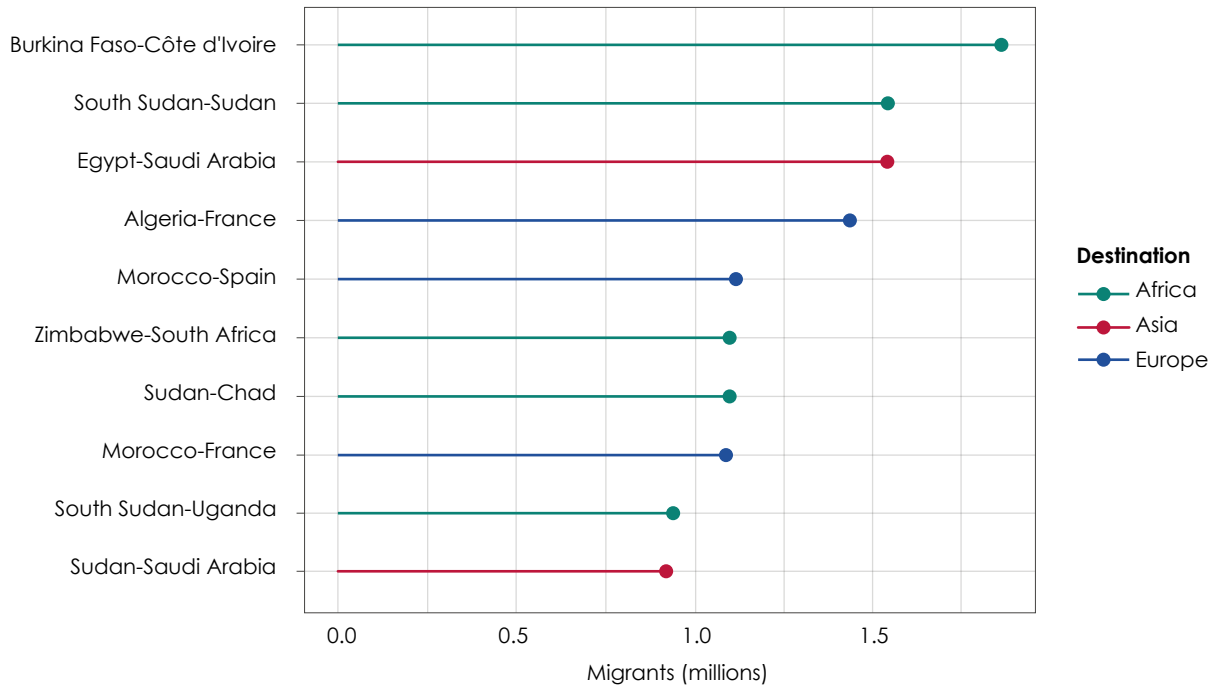
Finally, on clean industrialisation and CRMs, both Europe and Africa share ambitions and interest concerning green structural transformation through more local manufacturing, strategic infrastructure investments and regulatory frameworks that favour decarbonised development pathways and electrification. While demographic, resource and policy dynamics favour a mutually beneficial partnership – transitioning Africa beyond extractive dependencies and advancing Europe's economic security – structural power deficits, acute implementation delays and the competition of China pose obstacles to translating these shared ambitions and interest into bi-regional progress.

1. RE-IMAGINING EU–AFRICA MOBILITY AND SKILLS PARTNERSHIPS

1.1 THE JOINT VISION FOR 2030 FACING POLITICAL POLARISATION AND XENOPHOBIC RHETORIC

Public and policy debates regarding migration and mobility in Europe remain deeply impacted by political polarisation, growing xenophobic rhetoric and security-driven narratives that obscure as well as frequently contradict evidence-based policymaking. Disinformation and anti-immigrant political discourses are all too often present: African mobility is often presented as an unmanageable security threat, ignoring the economic necessity of foreign labour for both African and European economic sustainability. Extensive research demonstrates that intra-continental mobility accounts for over 80% of all African migration, with individuals moving mostly within regional economic communities for trade, education and employment (ILO, 2018). This reality is central to the African Union's Agenda 2063, particularly through the Protocol to the Treaty Establishing the African Economic Community Relating to Free Movement of Persons, Right of Residence and Right of Establishment (AU Free Movement Protocol) and the African Continental Free Trade Area (AfCFTA) Protocol on Trade in Services. However, slow ratification and domestic implementation of continental free movement frameworks continue to stifle regional labour market integration. Hence, grounding policies in empirical data collected by African research institutions allows governments to highlight the macroeconomic contributions of mobile workers, counter xenophobic rhetoric and reform restrictive visa policies that penalise African scholars, entrepreneurs and service providers.

Figure 1: Top 10 migration corridors involving African countries, 2024



Source: UN DESA (2025)

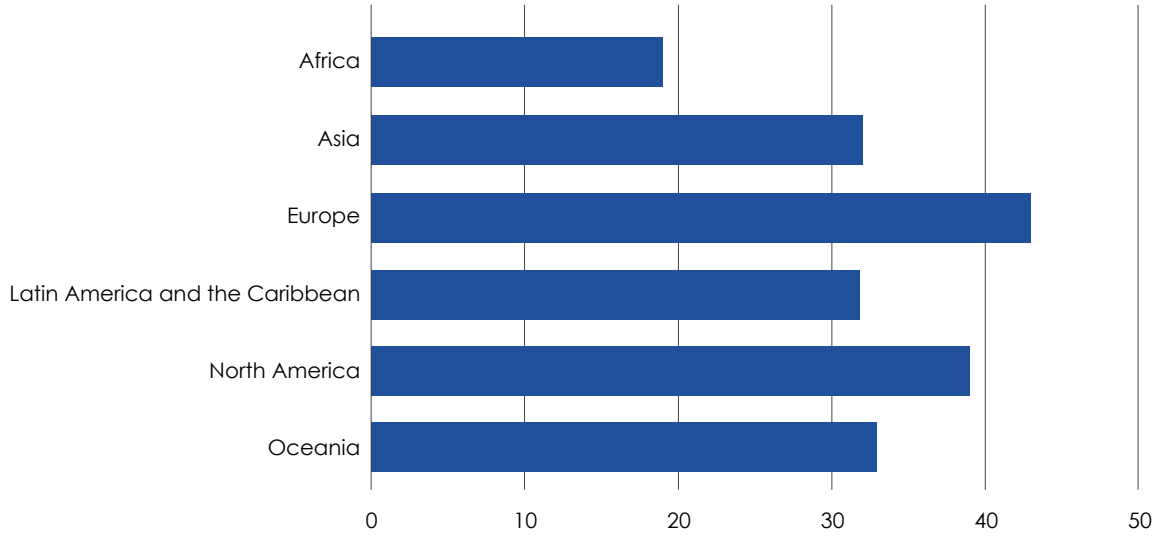
Against this backdrop, participants warned that some recent EU mobility measures appear in conflict with the spirit of the Joint Vision for 2030, adopted in February 2022 with the AU. In the Vision, the two Unions committed to managing 'all aspects of migration and mobility [...] in an integrated, comprehensive, and balanced way [...] in a spirit of joint responsibility and commitment, in full respect of international law and fundamental human rights'. Contrary to this spirit, some highlighted that the upcoming 'Regulation Establishing a New Common European System for Returns' focuses on making expulsions simpler, easier and faster, also via return centres outside the EU. In addition, participants highlighted that using visas as a re-admission tool does not reflect a balanced, mutually beneficial partnership aimed at promoting legal mobility and recognising benefits for both continents, especially with rising visa fees and new measures that restrict the duration of stay in Europe.

1.2 CONTRASTING DEMOGRAPHIC TRAJECTORIES AND THE NEED FOR MUTUALLY BENEFICIAL LABOUR MOBILITY FRAMEWORKS

Based on official statistics, by mid-2024, around 45.8 million international migrants originated from Africa. Most African-born migrants living outside the region were residing in Europe (around 11 million), Asia (nearly 7 million) and Northern America (around 2.7 million) (UN DESA, 2025). While this number has increased over the decades, from just under 20 million in 1990, it comprises only around 3% of the continent's overall population (UN DESA, 2025). The contrasting demographic trajectories of Europe and Africa highlight a structural asymmetry that presents both severe economic risks and opportunities for shared development. On the one hand, in the EU, over 22% of the population is currently older than 65 years, with the median age reaching 43 years, leading to a chronic workforce gap in several sectors particularly in ICT, healthcare and green construction (Kumar, 2025). By contrast, the African continent possesses the world's youngest demographic profile, where 62% of the population is under 35 years of age and the median age is just 19 years, as highlighted in research by the African Development Bank (Bhorat & Oosthuizen, 2020). Figure 2 illustrates the stark differences across the globe.

These demographic trends show that Africa's burgeoning youthful demographic is poised to become a significant portion of the global workforce. By 2030, half of all newcomers into the global labour force will come from sub-Saharan Africa, requiring the creation of up to 15 million new jobs annually (Laws et al., 2024). This challenge is particularly acute in fragile, conflict-affected and low-income economies that account for nearly 80% of the region's annual job creation needs. In these countries the lack of investments in skills building makes a portion of the unemployed youth practically unemployable.

Figure 2: Median age in 2025, by country and region



Source: Pew Research Center (2025)

> There is a strong need for a structural transition from transactional border enforcement to a new generation of mutually beneficial labour mobility agreements. Expanding legal migration channels between Africa and Europe does not require creating entirely new legal regimes, but rather eliminating administrative friction embedded in existing systems.

Although the first priority remains creating decent jobs and economic conditions within the African continent, participants acknowledged that current debate on labour mobility remains strongly unbalanced – focusing mostly on how to address Europe's labour shortfall. On the one side, looking at Europe, current labour mobility frameworks do not offer effective solutions to this widening labour gap, hence participants called for a structural transition from transactional border enforcement to a new generation of mutually beneficial labour mobility agreements. In this vein, experts stressed that expanding legal migration channels between Africa and Europe does not require creating entirely new legal regimes, but rather eliminating administrative friction embedded in existing systems. European labour recruitment is slowed down by complex bureaucracy, lengthy processing periods at consulates, high financial costs and opaque application procedures, which for some participants reflect a political preference problem, rather than a mere processing bottleneck. In addition, a major structural barrier is the lack of standardised qualification recognition frameworks across EU member states, which vary significantly by national jurisdiction and professional sector. Hence, only 11% of the work permits issued between 2014 and 2024 for foreign workers in Europe were granted to Africans (Kumar, 2025).

These administrative burdens deter qualified applicants and European employers, pushing prospective migrants toward informal channels or alternative labour destinations in Asia and the Gulf states, where recruitment systems are often more streamlined through 'package deals' (covering passports, contracts and documentation). Scaling up Global Skills Partnerships – where training programmes are co-financed by receiving countries – can transform mobility into a predictable, mutually beneficial process. Crucially, these partnerships should not focus solely on EU-bound migration corridors; they must align with the AU Free Movement Protocol and existing Regional Economic Communities (RECs) frameworks (e.g., ECOWAS, EAC) to advance intra-African skill portability and mutual recognition of qualifications. Anchoring EU-supported vocational training within continental integration frameworks ensures that skills development directly serves the AfCFTA's expanding trade in services while mitigating local skills deficits in origin countries.

On the other side, looking at Africa, it should not be underestimated that expanding legal labour pathways from Africa to Europe also bears a serious risk of brain drain in critical sectors, healthcare in particular. According to global data from the World Health Organization, the global health workforce shortfall includes an estimated gap of 6 million health workers in Africa by 2030 (WHO, 2026). One challenge is that being a health worker in most African states is not competitive compared to other regions, for reasons including low pay, poor infrastructure and heavy workload. This responsibility lies in the hands of African governments, which should invest much more on retention incentives, diaspora returns or African-set recruitment terms. The Africa staffing and recruitment market size is expected to reach US$ 32.18 billion by 2031 from US$ 16.50 billion in 2023 (The Insight Partners, 2024). Yet to prevent compounding these public health deficits, European labour initiatives, including the upcoming EU Talent Pool regulation (EU, 2026d), should ensure that European states recruiting African professionals co-invest with African governments in local educational infrastructure, funding training capacity for candidates who remain in domestic markets alongside those who migrate. In this regard, the WHO Global Code of Practice on International Recruitment of Health Personnel should serve as a non-negotiable basis for EU legal pathways to prevent brain drain in African countries facing severe labour shortages (e.g., Nigeria, Ethiopia, DRC). These safeguards should be extended to other critical sectors facing shortages in Africa, including teachers, engineers and vocational trainers.

To transition from high-level declarations to actionable outcomes, European and African policymakers, regional institutions and international stakeholders could implement four key strategic measures across mobility and skills development.

POLICY RECOMMENDATIONS

1 OPERATIONALISE MULTI-TIER GLOBAL SKILLS PARTNERSHIPS ALIGNED WITH CONTINENTAL INTEGRATION

WHAT? The European Commission, EU member states, the African Union (AU) and regional bodies (RECs) should co-fund vocational and technical training institutions across African hubs. These centres should operate a multi-tier model: equipping workers for (1) national and intra-African labour markets (supporting the AfCFTA and the AU Free Movement Protocol) and (2) targeted labour shortages in Europe. To operationalise this, the EU and AU should establish harmonised Skill Recognition Frameworks that allow qualifications acquired through Global Skill Partnerships to be legally recognised both across African sub-regions and within EU member states.

WHO? The European Commission, EU member states, the AU and AU Regional Economic Communities.

2 SYSTEMATICALLY ELIMINATE ADMINISTRATIVE FRICTION AND SIMPLIFY SKILL RECOGNITION

WHAT? European governments must undertake administrative reforms to reduce processing delays for legal visas and work permits. EU member states should establish standardised, cross-border frameworks for recognising African academic qualifications, technical certifications and prior professional experience, reducing evaluation costs and processing timelines. In parallel, African governments should invest more in academic or other institutions' collaboration for establishing equivalences. Finally, European states should expand embassy and consular capacities across African partner nations to eliminate operational backlogs that push prospective migrants toward informal channels.

WHO? The EU and its member states; the AU and its member states.

3 ESTABLISH FLEXIBLE MECHANISMS FOR CIRCULAR MOBILITYAND SERVICE PROVISION

WHAT? European migration policies should prioritise circular mobility, enabling African professionals, academics, entrepreneurs and service providers to move flexibly between Africa and Europe without forfeiting their legal residency status. Flexible multi-entry visa regimes should be expanded to facilitate short-term service delivery, cross-border commercial ventures and technology transfers.

WHO? The EU and its member states; AU member states.

4 INVEST IN CONTINENTAL MIGRATION DATA INFRASTRUCTURE

WHAT? The EU and the AU should co-fund and expand the technical capabilities of the African Migration Observatory and national statistical agencies. Standardising high-quality data collection on labour market trends, migration volumes and cross-border trade allows policymakers to counter xenophobic media narratives with empirical facts, design evidence-based labour policies and monitor the developmental impacts of mobility.

WHO? The EU and the AU.

2. STRENGTHENING THE EUROPE-AFRICA SECURITY ARCHITECTURE

2.1 INCREASED MILITARY EXPENDITURES VS. A PROGRESSIVELY DETERIORATING SECURITY ENVIRONMENT

The peace and security architecture across Africa faces severe strain caused by a combination of compounding crises. Violent extremism continues to expand in the Sahel, Lake Chad Basin, Great Lakes, Horn of Africa and Mozambique, while open warfare in Sudan has triggered horrific humanitarian consequences and regional destabilisation. Despite significant financial investments in hard security measures, military operations and counter-terrorism infrastructure, as well as the AU's mandate to 'Silence the Guns' by 2030 (UNDP, 2021). Military expenditure in Africa grew for the third consecutive year in 2025, reaching 58.2 billion US dollars, a 8.5% increase from 2024 and 45% higher than in 2016 (Liang et al., 2026). This growth was mostly due to growing geopolitical instability and cross-border security threats, widespread internal conflicts and insurgencies in sub-Saharan Africa and regional rivalry and tensions particularly in North Africa (Okafor et al., 2026). Despite this, political fragility and insecurity have increased. On the one hand, the continent's security landscape is further complicated by severe governance crises and the erosion of democratic institutions. Recent years have seen a resurgence of unconstitutional changes of government, with some scholars underlining how growing international security force assistance can inadvertently create favourable conditions for coups by reinforcing the central role of military actors and exacerbating civil-military imbalances in fragile states (Wilén, 2025). On the other hand, democratic norms are being steadily undermined from within through constitutional manipulation tactics by incumbents seeking to entrench regime continuity. Together, these governance deficits destabilise state-society relations and indirectly fuel broader regional insecurity.

The worsening of regional security shows that military force alone cannot resolve complex security crises, triggered by various forms of vulnerabilities, including governance failures, political exclusion, economic collapse, human rights abuses, climate degradation and competition over natural resources (e.g., with informal taxation systems on artisanal gold mining with no government approval, to directly fund armed groups in the Sahel and Eastern DRC; see Brugger & Zongo, 2023). Sustainable peace requires shifting away from an over-reliance on military hardware toward long-term investments in local governance, judicial integrity, climate adaptation and rural development. While participants recognised the EU's explicit commitment to these soft-security priorities, they also noted that EU interventions are frequently hamstrung by highly bureaucratised processes that adapt too slowly to shifting local dynamics.

“The worsening of regional security shows that military force alone cannot resolve complex security crises, triggered by various forms of vulnerabilities, including governance failures, political exclusion, economic collapse, human rights abuses, climate degradation and competition over natural resources. Sustainable peace requires shifting away from an over-reliance on military hardware toward long-term investments in local governance, judicial integrity, climate adaptation and rural development.”

2.2 REKINDLING THE EU-AU SECURITY PARTNERSHIP

The status of the AU–EU security partnership looks less solid than before. The EU remains the main external supporter of the APSA via the European Peace Facility – which replaced the former African Peace Facility – although African partners remain reluctant to fully utilise these new funding mechanisms. This friction stems primarily from stringent EU conditionalities (Bergmann, 2025), including mandatory compliance with Integrated Methodological Framework, human rights and international humanitarian law risk assessments (European External Action Service (EEAS), 2021; Hauck, 2020), restrictive financial and arms control procurement protocols, and the bypassing of AU multilateral frameworks in favour of bilateral or ad-hoc security interventions (Sousa & Duic, 2025). Conversely, while formal reciprocal conditionality remains limited, European assistance is structurally bound by member state political consensus, internal export controls and domestic accountability standards, requiring recipient forces to align with broader European strategic, human rights and governance priorities (EEAS, 2023).

Against this backdrop, the rise of military regimes across West Africa and the Sahel presents a diplomatic dilemma for the EU–Africa partnership. Following unconstitutional changes of government, traditional democracy-promotion mechanisms have struggled to prevent backsliding, with some participants attributing this also to funding cuts to democracy promotion initiatives. While the AU and regional bodies (e.g., ECOWAS) have formally suspended transition states, their increased diplomatic isolation – they still participate in AU meetings and processes despite having no voting rights – has proven counterproductive. While AU norms normally apply continentally, subregional dispositions continue to shape continental responses to political instability and insecurity in line with the AU's principle of subsidiarity, often exacerbating local instability and driving military authorities toward other external military actors (e.g., Russia). In these countries it is important to combine normative principles with diplomatic pragmatism, with sanctions designed in a way that does not prevent informal communication, humanitarian aid, access to justice and direct support for essential social services, and civil society organisations. Sustaining pragmatic channels of engagement protects local populations, prevents power shifts toward insurgent or violent non-state actors and advances long-term stability without providing political endorsement to military regimes.

Achieving a more effective EU–AU security architecture requires harmonising bilateral security cooperation with continental multilateral structures, including the AU Peace and Security Council (PSC), its RECs and specialised mechanisms like Afripol. In recent years, European countries have increasingly pursued direct bilateral strategies with individual African states, such as the Security and Defence Partnership signed between the EU and Ghana in 2026. However, although bilateral agreements allow security assistance to be tailored quickly to specific national operational needs, an over-reliance on uncoordinated bilateral initiatives risks fragmenting continental security frameworks and undermining regional organisations such as the AU and sub-regional economic communities. This is particularly the case for post-coup governance dynamics, where uncoordinated defence arrangements can trigger increased military spending without delivering proportional improvements in public safety (Bove & Nistico, 2014; David et al., 2026).

Therefore, participants highlighted that the AU–EU cooperation should move beyond discussing only African security crises to establishing permanent dialogue on global peace and security challenges that affect both continents, including how Africa and Europe can cooperate beyond the African continent at the UN level (e.g., UN Security Council) on broader global conflicts such as the war in Ukraine or tensions in the Middle East. In addition, they called for a deep reform of the APSA, which after two decades has not delivered a peaceful and stable continent. Making the APSA fit for tackling today's complex development-security challenges means elevating the primacy of domestic politics and institutional building to avoid reliance on external actors – whose support cannot be guaranteed. In addition, it means equipping the APSA with the right tools to develop a holistic approach that addresses hard security threats with development aspirations. As an example, maritime-security initiatives in the Horn are disconnected from counter-terrorism initiatives on land, making interventions ineffective despite a recognisable uptick in expenditures. To transition from high-level declarations to actionable outcomes, European and African policymakers, regional institutions and international stakeholders should consider implementing the following five measures on security governance.

POLICY RECOMMENDATIONS

1 REBALANCE SECURITY INVESTMENTS TOWARD GOVERNANCE AND CIVIL DEVELOPMENT

WHAT? European and African authorities need to redirect financial capital away from armed military operations and toward long-term governance reform, community peacebuilding and preventative diplomacy (Bergmann, 2025). Enhancing joint efforts like the EU–AU Standing Consultation Mechanism on Peace Mediation – by embedding liaison personnel directly within the mediation units of both the AU and the European External Action Service – serves as a practical path forward for this strategic pivot. Concurrently, funding instruments such as the European Peace Facility must reallocate a substantial share of their budgets to non-kinetic priorities, including anti-corruption frameworks, civilian policing, expanded legal access and grass-roots reconciliation initiatives. There should be a mutual approach towards costing the Silencing the Guns in Africa Flagship to determine mandate and duly resource the initiative.

WHO? The EU and its member states; the AU and its member states.

2 INTEGRATE BILATERAL SECURITY AGREEMENTS INTO CONTINENTAL FRAMEWORKS

WHAT? European nations entering into bilateral Security and Defence Partnerships with individual African states must formally align these initiatives with the African Peace and Security Architecture. Bilateral military assistance, technical training and equipment supply must support sub-regional security strategies and complement the AU's broader peacebuilding frameworks.

WHO? The EU and its member states; the AU and its member states.

3 FORMALISE RESOURCE EXTRACTION AND ELIMINATE CONFLICT FINANCING

WHAT? The AU Commission, the EU and national governments must establish binding regulatory frameworks to trace and formalise the extraction and trade of CRMs and precious metals, such as gold and copper. Implementing strict supply chain traceability standards eliminates conflict-driven resource extraction that finances armed groups across the Sahel and Great Lakes regions.

WHO? The AU Commission, the EU and national governments.

4 INSTITUTIONALISE PRAGMATIC ENGAGEMENT AND CIVILIAN-CENTRIC DIPLOMACY

WHAT? The EU and the AU should maintain functional, non-political channels of communication with de facto authorities in transition states to address human security, humanitarian aid and regional counter-terrorism efforts. Security assistance in transition contexts should focus on protecting civilian populations, supporting local civil society organisations and reinforcing institutional resilience. The Africa Facility to Support Inclusive Transitions, established by UNDP and the AU with EU support, offers a good model allowing formal/informal engagement in sanctioned/transition states (e.g., observing referendums in Guinea and Gabon). Joint diplomatic efforts must prioritise building realistic transition timelines to restore constitutional governance without imposing indiscriminate economic sanctions that harm local populations.

WHO? The EU and the AU.

5 STRENGTHEN JOINT PARLIAMENTARY OVERSIGHT AND DEMOCRATIC INFRASTRUCTURE

WHAT? The European Parliament and the Pan-African Parliament should formalise regular joint consultative meetings to provide democratic oversight of EU–Africa security agreements, Global Gateway investments and mobility programmes. Furthermore, international partners must re-engage with continental democracy-monitoring frameworks, such as the African Governance Architecture and the African Peer Review Mechanism, allocating long-term funding to support democratic governance, institutional integrity and transparent electoral processes across the continent.

WHO? The European Parliament and the Pan-African Parliament.

3. A 'NEW' ECONOMIC DEVELOPMENT: CLEAN INDUSTRIALISATION AND THE PIVOTAL ROLE OF CRITICAL RAW MATERIALS

The two regions share similar definitions of economic development. The mid-1950s development goals of industrialisation and structural transformation remain high on African agendas, while they have also moved to the core of the EU's strategic objectives. The contemporary reinterpretation of industrialisation includes a green (or clean) dimension, a feature that is far from exclusive to the EU, as more than 20 African countries have adopted some form of green industrialisation policy (Byiers, 2024). In this context, CRMs play a pivotal role and African governments have become more affirmative with regard to domestic value addition. Beyond the much-debated risk that CRMs may deepen, rather than reverse, the extractive nature of African economies, there seems to be a consensus, for instance at the G7 level, that CRMs should ensure local value addition (Tenezakis, 2026) where resources are extracted, and that material circularity could play a crucial role in advancing this agenda in both regions (G7, 2026).

3.1 THE EU AGENDA

There has been a tremendous shift in the EU's economic objectives over the past few years. For three decades, the EU's goals were centred on efficiency, promoting the relocation of production to the lowest cost locations and the elimination of the trade barriers that necessarily accompany this objective. This agenda is currently highly debated and partially replaced by one focused on economic security/sovereignty, aimed at rebuilding productive capacities at home, forging strategic trade and investment partnerships and agreements with partner countries, alongside decarbonisation and competitiveness. At the domestic level, the objective of combining decarbonisation with reindustrialisation has been translated into the goal of achieving climate neutrality by 2050, with intermediate targets for 2030 and 2040. These agendas have contributed to the decarbonisation of European economies. In 2024, total net greenhouse gas emissions in the EU were 39% below their 1990 levels, while the EU's GDP grew by 71% over the same period (EU, 2025). Yet, European actors remain heavily focused on internal debates over these sometimes contradicting goals, and this creates unhelpful uncertainty regarding Europe's future demand for partner countries.

Internationally, rather than treating external engagement as a separate foreign policy issue, these instruments integrate international partnerships directly into the EU's competitiveness agenda, elevating them alongside energy, finance and skills as fundamental components of industrial strength. This means, first, supporting the decarbonisation of partner countries – an objective underpinning the Carbon Border Adjustment Mechanism (CBAM), which participants recognised as a strong incentive to cooperate on climate policies and decarbonised value chains, even though persisting technical problems are still hampering its full implementation; second, ensuring that CRM partnerships move beyond resource extraction to support industrial development, skills development, innovation, environmental considerations and local value creation, including at the community level and with the participation of the local private sector; and third, ensuring that CRM mining projects are successfully implemented in a context of price volatility.

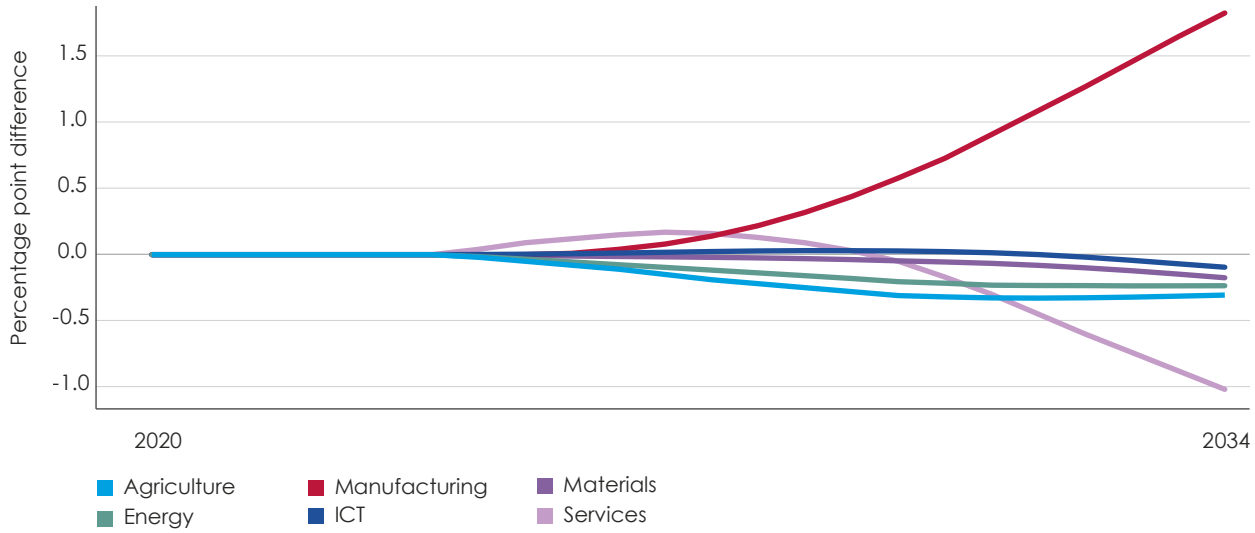
Concretely, several key initiatives operationalise this dual-track approach. The Clean Industrial Deal sets out actions to boost the supply and demand of clean tech products, unlock public and private investment and introduce 'Clean Trade and Investment Partnerships' to facilitate trade flows, building on the initial agreement signed with South Africa in November 2025. Similarly, the CRM Act explicitly calls for mutually beneficial partnerships with

emerging markets and developing economies in line with the Global Gateway strategy. It emphasises diversifying raw material supply chains, adding local processing value in partner countries and strengthening cooperation through capacity building and circular technology transfers. Furthering this agenda, the Net-Zero Industry Act carries direct external relevance by establishing 'Net-Zero Industrial Partnerships' – non-binding frameworks designed to advance concrete actions of mutual interest in net-zero technologies. Finally, the proposed Industrial Accelerator Act seeks to protect and expand Europe's manufacturing share in key sectors like steel, cement, aluminium, cars and net-zero technologies. While its proposed 'Made in Europe' framework could extend to partner countries, African nations are simultaneously implementing their own local manufacturing requirements. Aligning 'Made in Europe' and 'Made in Africa' strategies will be essential to ensure these policies create value-chain synergies rather than conflicting trade barriers.

In practice, EU relations with African partners within these frameworks are structured around three core pillars: investment, trade and regulatory cooperation. On investment, the Global Gateway drives the clean industrial transition by deploying renewable energy, improving electricity access, strengthening energy security and supporting local job creation. Key financial enablers like the European Investment Bank and the European Bank for Reconstruction and Development – which recently joined the Africa Green Industrialisation Initiative under the AfCFTA framework – mobilise risk-adjusted capital. They deploy blended finance, guarantees and risk-sharing instruments alongside technical assistance for local regulators and financial institutions. Second, formal trade agreements structure bilateral market access, establishing predictable rules for clean tech and industrial exchanges. Third, policy dialogue and regulatory cooperation draw on European experience to support partner countries in adopting shared decarbonisation standards and developing carbon pricing mechanisms.

These policies have translated into a number of concrete initiatives in the past two years. One example is the first Clean Trade and Investment Partnership with South Africa, which aims at securing EU access to strategic segments of the green value chain while creating local value and contributing to job creation (EU, 2026b). Another is the Trans-Mediterranean Renewable Energy and Clean-Tech Cooperation Initiative (T-MED), launched under the Pact for the Mediterranean, which aims to accelerate the development of renewable energy, hydrogen, clean technologies, manufacturing and modern electricity networks across the Mediterranean region (EU, 2026c). Similarly, the Haib Copper Project in Namibia has become one of the first copper projects in sub-Saharan Africa to produce green hydrogen for green iron production. After a successful pilot phase, it is now scaling up to commercial production, benefiting from secured industrial demand in the EU.

Figure 3: Forecast of percentage point difference in sectors' contribution to Africa's GDP (in %)



Source: Cilliers & Ngundu (2026)

3.2 THE AFRICAN AGENDAS

Despite the diversity of challenges and political goals across the 55 countries of the region, the continent's overarching economic development objective is industrial transformation towards a cleaner, higher value-added economic structure that is also capable of creating jobs while moving beyond the traditional extractive model (African Development Bank, 2025; Medinilla et al., 2025). More specifically, value addition must be approached as an ecosystem integrating renewable energy, critical mineral processing, green fertilisers, green fuels, African manufacturing and regional value chains. African stakeholders have also identified a number of sectoral priorities, including the agrifood sector and its related inputs, such as renewable energy, grids and transmission, the mobility sector, including vehicle assembly and two-wheelers, and battery value chains (Hege & Olorunfemi, 2026). This broad range of objectives also requires building the necessary skills and capacities and establishing a favourable investment and regulatory environment.

The region undoubtedly possesses many of the assets needed to achieve these objectives: abundant natural resources, a young population, the future global workforce, a single market in the making through the African Continental Free Trade Area (AfCFTA), which reduces barriers among 55 countries and 1.4 billion people, and the opportunity to establish a coherent rules-based system. As an example, Namibia's success may lie in the fact that its Low Carbon Special Economic Zones bring together all the elements required for value creation on the continent within a single ecosystem, including competition rules, investment policy and intellectual property rights (Republic of Namibia, 2022). Along the same lines, the Africa Green Industrialisation Initiative (Republic of Kenya, 2023), endorsed by the AU Heads of State in 2025, supports private sector development by identifying the policy changes required for specific contexts and projects, particularly cross-border initiatives that must operate across different national regulatory frameworks. The initiative also helps attract investment, from development finance institutions (DFIs) and the private sector, and supports building pipelines of projects, as well as support to project implementation throughout the entire project cycle. Moreover, environmental, social and governance (ESG) frameworks are increasingly being applied across the region with more and more countries like Morocco calling for developing a standardised African ESG framework. In addition, several countries are progressively embedding ESG frameworks in domestic legislation, with Guinea frequently cited as a success story in this regard.

> Despite the diversity of challenges and political goals across the 55 countries of the region, the continent's overarching economic development objective is industrial transformation towards a cleaner, higher value-added economic structure that is also capable of creating jobs while moving beyond the traditional extractive model.

3.3 THE CHALLENGES

Despite the overall convergence and complementarity of objectives, implementing clean industrialisation processes in both Europe and Africa while improving the competitiveness of the two regions, with respect to each other and to third parties, such as China, is fraught with challenges.

A first challenge relates to policy conceptualisation and design. Several participants underlined how important it is to get the definitions right: a precise understanding of what industrialisation, green, clean, criticality (when referring to CRMs), mutually beneficial partnerships, shared interests, national preferences and comparative advantage actually mean for European and African stakeholders, as well as within the framework of the bi-regional relationship. Just as an example, participants warned how difficult it is for mining operators to comply with the green taxonomy, thus to mobilise green finance. Moreover, they noted that cement or water are far more critical than other minerals or inputs for achieving local value addition in some African countries. Along the same lines, industrialisation in some African

> While demographic, resource and policy dynamics favour a mutually beneficial partnership – transitioning Africa beyond extractive dependencies and advancing Europe's economic security – structural power deficits, acute implementation delays and the competition of China pose obstacles to translating these shared ambitions and interest into bi-regional progress.

countries means, and requires, boosting productive capacities and infrastructure up to standard regulatory frameworks, securing energy supply and guaranteeing access to early-risk and long-term finance. Beyond the need to align definitions, this is a highly complex political endeavour. Economic history teaches us how difficult it is to design and implement successful industrial policies. Adding a green or clean dimension, approaching the issue from two different regional perspectives and seeking consistency in a bi-regional framework make this objective even more ambitious.

The second challenge lies in the fact that this complex agenda is not exempt from conflicts of interest, trade-offs and dilemmas. One conflict of interest may lie in the zero-sum game of adding value to extractive industries. In this sense, the question arose as to whether Europe can secure what it needs without repeating an extractive pattern. One example discussed was the potential for the CBAM to hinder the short-term prospects for green industrialisation in partner countries, given the shift in incentives from 'cheap' partners to 'cheap and green' partners, something that requires both a regulatory transition and the capacity to implement a carbon pricing system. Conflicts of interest will also stem from heterogeneity, both across productive sectors and at the regional level, reflecting internal inequalities within both Europe and Africa. This poses a particular challenge for regional initiatives.

A third set of challenges is specific to Africa's path towards structural transformation. Some participants framed these around four building blocks: (i) affordable and reliable power, at the core of the continent's needs; (ii) infrastructure, without which goods cannot move; (iii) water, which is vital for the mining industry and also particularly scarce in the region; and (iv) energy efficiency, given that electricity grids are old and inefficient. Regarding these inefficiencies, it was pointed out that mining in Africa is particularly expensive. Countries such as South Africa and Zambia experience 10–14 hours of daily load shedding, while transmission grids are 60–70 years old. Electricity prices vary between countries, with the average price among 33 countries with data being $0.121 per kWh (Kiprono, 2026), with transmission inefficiencies causing a 10-page ChatGPT report to consume about 59 litres of water (Shumba et al., 2025). These inefficiencies are particularly challenging in sectors, whether mining or green industrialisation, that are highly capital-intensive and require large-scale investment. In this sense, African pension funds and insurers hold around US$ 775 billion in assets, of which US$ 455 billion is in pensions and US$ 320 billion in insurance (Africa Finance Corporation, 2025). Part of these assets remains locked due to bureaucratic barriers. It is in this context that several participants underlined the need to provide an enabling environment, with both domestic and international investors seeking stability, good governance and return on investment. Against this backdrop, an implementation gap persists. Frameworks, policies and initiatives do not always translate into tangible results within an acceptable time frame. The EU appears to be well positioned and well intentioned when it comes to its CRM policy, but it is also perceived as being slow in implementation. Implementation is also a matter of scale. A number of existing projects could benefit from being scaled up into larger and more ambitious initiatives, from individual projects to broader pipelines, as is the case with T-MED.

Lastly, a shared challenge for both Europe and Africa is the race for competitiveness with China – a partner, a competitor and a geostrategic challenge at the same time – with which both regions face a significant gap in skills and technology. An additional layer of complexity stems from the uneven presence and role of Chinese actors across the two regions. In the specific field of industrialisation and CRMs, European actors must also compete with Chinese firms in building partnerships in Africa. For instance, around 80% of the mining assets along the Lobito Corridor, one of Global Gateway's flagship projects, are under Chinese ownership.

POLICY RECOMMENDATIONS

1 A SHARED CONCEPTUAL FRAMEWORK FOR CLEAN INDUSTRIALISATION…

WHAT? Develop a shared framework for clean industrialisation by agreeing on common definitions of key concepts, including industrialisation, criticality, mutually beneficial partnerships, comparative advantage and local value addition, to improve policy coherence and the design of bi-regional initiatives.

WHO? European Commission, AU, EU member states.

2 … THAT ALSO ESTABLISHES MECHANISMS FOR DEALING WITH CONFLICTS OF INTEREST, TRADE-OFFS AND INCONSISTENCIES…

WHAT? Within such shared framework, ensure that the implementation of instruments such as the CBAM continues to be accompanied by regulatory cooperation and capacity-building support, enabling partner countries to develop carbon pricing systems and avoid undermining their green industrialisation prospects; and that impact on third countries is included in impact assessments of forthcoming legislation (e.g., the Industrial Accelerator Act).

WHO? European Commission, AU, EU member states.

3 … AND TAKES INTO ACCOUNT THE ROLE OF CHINA IN BOTH REGIONS.

WHAT? A joint strategy should enhance competitiveness in strategic value chains by addressing the technological and skills gap with China and coordinating responses to both potentially cooperate with Chinese companies in third countries and to counterbalance growing Chinese influence in Africa's critical raw materials sector.

WHO? European Commission, AU, EU member states.

4 AFRICA'S AGENCY

WHAT? Better use of leveraging power of resource-rich countries. When feasible politically, building sub-regional alliances of countries with different and complementary resource endowments.

WHO? African governments, AU.

5 SUPPORTING THE BASICS OF INDUSTRIAL TRANSFORMATION

WHAT? Prioritise the enabling conditions for industrial transformation by investing in reliable and affordable energy, transport infrastructure, water management and energy efficiency, while strengthening governance frameworks to unlock domestic capital and attract long-term private investment.

WHO? African governments, private sector, with EU, DFIs, other development partners.

6 FROM PROJECTS TO PIPELINES

WHAT? Accelerate the implementation and scale-up of successful CRM and clean industrialisation initiatives by transforming individual projects into regional investment pipelines, for instance with T-MED.

WHO? European Commission, African governments, DFIs, private sector.

7 AN ENABLING ENVIRONMENT

WHAT? Strengthen stable, transparent and predictable investment environments by reducing bureaucratic barriers, improving governance and mobilising domestic financial resources, including sovereign wealth and pension funds, for industrial development.

WHO? African governments and regional organisations, private sector.

CONCLUSIONS

The ETTG-OSF project that now comes to an end has focused on very concrete issues related to building deeper and more horizontal bi-regional relations between Europe and Africa. However, beyond these specific issues, the discussions held over the three years of the project have also brought to the fore a number of structural, long-term challenges that have consistently emerged across different topics and multistakeholder dialogues held in Brussels, as well as in several African capitals.

1

WE NEED RULES.

Are we inevitably heading towards a rules-less international order? The world is, and will continue to be, de facto ruled. There will therefore be implicit or explicit rules that we may or may not like, but rules nonetheless. As several African and European countries are middle-powers, rules are needed for both continents to speak the same language and have a stronger leverage when engaging in international partnerships.

2

AND A DICTIONARY.

Over the past three years, we have co-organised a series of multistakeholder dialogues with several think tanks and CSOs from Northern, Western, Eastern and Southern Africa, dissecting vocabulary and the different interpretations of concepts such as green, clean, industrialisation, criticality, regular migration, security, effective governance and human security. Since the whole project and reflection is about building more equal, horizontal and mutually beneficial bi-regional relations, this also means, if not co-defining those concepts, and hence the rules, at least developing a dictionary that captures their different meanings. Hence, supporting structural think-tank dialogue between the two continents can offer a great opportunity to provide decision-makers with shared and innovative solutions to address current areas of divergence.

3

HOWEVER, THERE IS AN IMPLEMENTATION GAP,

since not all goals, strategies and tools actually deliver. This happens at different levels. First, not every aspect of the EU–African partnership is win-win. Participants discussed a broad range of objectives, some of which are contradictory or involve trade-offs. Second, there are numerous bureaucratic and administrative constraints at the national, regional and bi-regional levels. In some cases, complexity can even be deliberately built into the system, as may happen in areas such as trade or migration. Third, some of the tools available are simply not fit for purpose, as may be the case with sanctions.

4

SHORT, MEDIUM AND LONG TERM.

It takes time to shift towards a new international order and narrative, and from a technical to a more political approach to bi-regional EU–Africa relations. When considering the time frame, it is also important to bear in mind that gains and losses will change over time. Policies that generate costs or losses in the short term may produce different outcomes over a longer period, and vice versa. While this can be politically challenging to support, it is essential to build an honest, effective and trustworthy relationship.

REFERENCES

1. Africa Center for Strategic Studies. (2025, 17 December). Ten African security trends from 2025 in graphics. https://africacenter.org/spotlight/2025-security-trends-graphics-sudan-sahel-nigeria-somalia-drones-china/

2. African Development Bank. (2025). Africa industrialisation index 2025. Report, African Development Bank, African Union, Unido. https://www.afdb.org/en/documents/africa-industrialisation-index-2025

3. Africa Finance Corporation. (2025). State of Africa's infrastructure report 2025. https://www.africafc.org/our-impact/our-publications/state-of-africa-infrastructure-report-2025

4. Bergmann, J. (2025, November 7). AU-EU cooperation on peace and security. Presentation at 'From Cairo to Luanda: A 25-Year Parliamentary Stocktake of AU-EU Relations', Pan-African Parliament.

5. Bhorat, H., & Oosthuizen, M. (2020). Jobs, economic growth, and capacity development for youth in Africa. Working Paper Series No. 336, African Development Bank, Abidjan, Côte d'Ivoire.

6. Bove, V., & Nisticò, R. (2014). Coups d'état and defense spending: A counterfactual analysis. Centre for Studies in Economics and Finance, Working Paper No. 366. https://www.csef.it/WP/wp366.pdf

7. Brugger, F., & Zongo, T. (2023). Salafist violence and artisanal mining: Evidence from Burkina Faso. Journal of Rural Studies, No. 100. https://www.sciencedirect.com/science/article/pii/S0743016723000955

8. Byiers, Bruce. (2024, August). Towards a continental industrial policy? ECDPM. https://ecdpm.org/work/towards-continental-industrial-policy

9. Cilliers, J., & Ngundu, M. (2026, March). Africa manufacturing forecast. African Futures, ISS. https://futures.issafrica.org/thematic/07-manufacturing/

10. David, A., et al. (2026). Military spending and crowding-out effects: Evidence from Sub-Saharan Africa. IMF Working Papers. https://www.elibrary.imf.org/view/journals/001/2026/069/article-A001-en.xml

11. EEAS. (2021, 24 August). Questions and answers on the European Peace Facility's Integrated Methodological Framework. https://www.eeas.europa.eu/eeas/questions-and-answers-european-peace-facility's-integrated-methodological-framework_en

12. European Commission. (2026), Report on the EU Guidelines on Promoting Compliance with International Humanitarian Law January 2025 – December 2025, Joint Staff Working Document, Brussels, 14 September 2026, https://ec.europa.eu/echo/files/policies/ihl/annex_-_report_on_the_eu_guidelines_on_promoting_compliance_with_ihl_en_-_september_2026.pdf

13. European Union, African Union. (2022). 6th European Union–African Union summit: A joint vision for 2030. https://www.consilium.europa.eu/media/54412/final_declaration-en.pdf

14. EU. (2025). EU climate action progress report. Strengthening competitiveness on the road to climate neutrality. https://climate.ec.europa.eu/eu-action/climate-strategies-targets/progress-climate-action/eu-climate-action-progress-report-2025_en E

15. EU. (2026a). EU trade relationships by country/region. Negotiations and agreements. https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/negotiations-and-agreements_en

16. EU. (2026b). Factsheet: EU-South Africa: Clean Trade and Investment Partnership (CTIP). https://policy.trade.ec.europa.eu/factsheet-eu-south-africa-clean-trade-and-investment-partnership-ctip_en

17. EU. (2026c). Trans-Mediterranean Renewable Energy and Clean-Tech Cooperation Initiative (T-MED). https://north-africa-middle-east-gulf.ec.europa.eu/what-we-do/trans-mediterranean-renewable-energy-and-clean-tech-cooperation-initiative-t-med_en

18. EU. (2026d). Regulation (EU) 2026/1047 of the European Parliament and of the Council of 29 April 2026 establishing an EU Talent Pool. https://eur-lex.europa.eu/eli/reg/2026/1047/oj/eng

19. G7. (2026, July). G7 leaders' declaration on securing supply chains for critical minerals. G7 Communiqué. https://www.consilium.europa.eu/media/nfqf1rca/g7-leaders-declaration-on-securing-supply-chains-for-critical-minerals.pdf

20. Hauck, V. (2020). The latest on the European Peace Facility and what's in it for the African Union. ECDPM Briefing Note No.120. https://ecdpm.org/application/files/4816/5546/8617/Latest-European-Peace-Facility-What-African-Union-Briefing-Note-120-ECDPM-September-2020.pdf

21. Hege, Elisabeth, & Olorunfemi, Gboyega. (2026). Green industrialisation priorities in Africa and partnership opportunities with Europe. Ukámá. https://www.iddri.org/sites/default/files/PDF/Publications/Catalogue%20Iddri/Rapport/202604-Ukama%20green%20industrialization.pdf

22. International Labour Organization (2018), Global and Continental Policy Frameworks guiding migration and labour mobility in Africa

23. Kiprono, Felix. (2026, February). Lighting Africa: How much does electricity cost across Africa? Africa Data Hub. https://www.africadatahub.org/blog/lighting-africa-how-much-does-electricity-cost-across-africa

24. Kumar, C. (2025, November 7). Mobility, skills and migration. Presentation at "From Cairo to Luanda: A 25-Year Parliamentary Stocktake of AU-EU Relations", Pan-African Parliament.

25. Laws, A., Saliba F., Sever C., & Tucker L. (2024, November 12). The clock is ticking on sub-Saharan Africa's urgent job creation challenge. IMF. https://www.imf.org/en/blogs/articles/2024/11/12/the-clock-is-ticking-on-sub-saharan-africas-urgent-job-creation-challenge

26. Liang, X., et al. (2026, April). Trends in world military expenditure, 2025. SIPRI Fact Sheet. https://www.sipri.org/sites/default/files/2026-04/2604_milex_2025.pdf

27. Medinilla, Alfonso, Dekeyser, Koen, & Karkare, Poorva. (2025, April). Green industrialisation in an age of disruption: Africa, Europe and the global economy. ECDPM. https://ecdpm.org/work/green-industrialisation-age-disruption-africa-europe-and-global-economy

28. Okafor, C., J., Ononogbu, O., A., Ojimba, A., C., and Ani, C., C.. (2023). Trans-border Mobility and Security in the Sahel: Exploring the Dynamics of Forced Migration and Population Displacements in Burkina Faso and Mali,Society. 2023 Jun 8:1-14. doi: 10.1007/s12115-023-00859-4.

29. Olivié, I., Fattibene, D., Johnson, J. G., Kane, I., Acheampong, T., Bergmann, J., Erforth, B., Hege, E., Kabemba, C., Muchena, D., & Phiri, S. (2025). From Cairo to Luanda: Parliamentary reflections on 25 Years of AU-EU relations. ETTG Policy Brief 9/2025. European Think Tanks Group.

30. Pew Research Center. (2025, 9 July). Today, Europe has the oldest population of any region; Africa has the youngest. https://www.pewresearch.org/short-reads/2025/07/09/5-facts-about-how-the-worlds-population-is-expected-to-change-by-2100/sr_25-07-09_world-pop_5/

31. Republic of Kenya. (2023, December). Green growth is the answer to climate change. https://www.president.go.ke/green-growth-is-the-answer-to-climate-change/

32. Republic of Namibia. (2022). *National policy on sustainable special economic zones 2022-2027*. Ministry of Industrialisation and Trade. https://mit.gov.na/policies/-/document_library/arcd/view_file/1872719

33. Shumba, Noah, Tshekiso, Opelo, Li, Pengfei, Fanti, Giulia, & Ren, Shaolei. (2025, July). A water efficiency dataset for African data centers. ACM SIG-CAS/SIGCHI Conference on Computing and Sustainable Societies (COMPASS '25), Toronto. https://arxiv.org/pdf/2412.03716

34. Sousa, R. R. P., & Duic, D. (2025). Implications of the European Peace Facility (EPF) to the African Peace and Security Architecture (APSA). In *The Palgrave handbook on China-Europe-Africa relations* (pp. 591–606). https://www.researchgate.net/publication/387859052_Implications_of_the_European_Peace_Facility_EPF_to_the_African_Peace_and_Security_Architecture_APSA

35. Tenezakis, E. (2026, 11 September) Le Kenya multiplie les annonces spectaculaires sur la souveraineté minière du pays. Le Monde Afrique. https://www.lemonde.fr/afrique/article/2026/09/11/le-kenya-multiplie-les-annonces-spectaculaires-sur-la-souveranete-miniere-du-pays_6770568_3212.

36. The Insight Partners. (2024, 17 September). Africa staffing and recruitment market key companies and SWOT analysis by 2031. https://www.theinsightpartners.com/reports/africa-staffing-and-recruitment-market

37. UNDP. (2021). Silencing the guns in Africa: A development approach to silencing the guns. https://files.acquia.undp.org/public/migration/africa/UNDP-Silencing-the-Guns-A-Development-Approach.pdf

38. UN DESA. (2025). International migrant stock 2024. https://www.un.org/development/desa/pd/content/international-migrant-stock

39. WHO. (2026, 7 July). Africa health workforce agenda, 2026–2035: A strategy for sustainable planning, training and retention of health workers. https://www.afro.who.int/sites/default/files/2026-07/AFR-RC76-4%20Africa%20Health%20Workforce%20Agenda%202026–2035.pdf

40. Wilén, Nina. (2025). An epidemic of coups: Civil-military (im)balance in the Sahel. In Nina Wilén, *Securitizing the Sahel: Analysing external interventions and their consequences*. https://academic.oup.com/book/61385/chapter-abstract/533185252?redirectedFrom=fulltext

LIST OF PARTICIPANTS (IN ALPHABETICAL ORDER)

(1) **Adrien de Bassompierre**, European Investment Bank

(2) **Ayman Adel**, African Migration Observatory

(3) **Damien Barchiche**, Institute for Sustainable Development and International Relations (IDDRI)

(4) **Daniele Fattibene**, European Think Tanks Group (ETTG)

(5) **Darlington Tshuma**, Istituto Affari Internazionali (IAI)

(6) **Despoina Damianidou**, EU Delegation Morocco

(7) **Dora Meredith**, ODI Europe

(8) **Elisabeth Hege**, Institute for Sustainable Development and International Relations (IDDRI)

(9) **Ettore Greco**, Istituto Affari Internazionali (IAI)

(10) **Hamza Saidi**, Policy Center for the New South (PCNS)

(11) **Ibrahima Kane**, Open Society Foundations (OSF)

(12) **Iliana Olivie**, European Think Tanks Group (ETTG)

(13) **Inès Auriol**, European Think Tanks Group (ETTG)

(14) **Inge Poelemans**, EU Commission, Directorate-General for Climate Action (DG CLIMA)

(15) **Isabelle Ramdoo**, Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development Secretariat

(16) **Jeggan Grey Johnson**, Open Society Foundations (OSF)

(17) **Jessica Hagen Zanger**, ODI Global

(18) **Jide Okeke**, United Nations Development Programme (UNDP)

(19) **Jolita Pons**, European External Action Service (EEAS)

(20) **Julian Bergmann**, German Institute of Development and Sustainability (IDOS)

(21) **Karim Karaki**, ECDPM

(22) **Linda Oucho**, African Migration and Development Policy Centre

(23) **María Santillán O'Shea**, Real Instituto Elcano

(24) **Mariana Camelo** European Think Tanks Group (ETTG)

(25) **Mariem Dkhil**, INSUCO

(26) **Marta Driessen**, Elcano Royal Institute

(27) **Nargis Kassenova**, Davis Centre, Harvard University

(28) **Niels Keijzer**, German Institute of Development and Sustainability (IDOS)

(29) **Nouzha Chekrouni**, Policy Center for the New South (PCNS)

(30) **Rim Berahab**, Policy Center for the New South (PCNS)

(31) **Roslyn Ng'eno**, African Continental Free Trade Area (AFCTA) Secretariat

(32) **Sabrine Emran**, Policy Center for the New South (PCNS)

(33) **San Bilal**, ECDPM

(34) **Sebastien Treyer**, Institute for Sustainable Development and International Relations (IDDRI)

(35) **Veronica Bolton Smith**, Critical Minerals Africa

This Policy Brief was realised
with the support of the
Open Society Foundations.

ETTG | European Think Tanks Group

© European Centre for Development Policy Management (ECDPM), the Elcano Royal Institute, the International Affairs Institute / Istituto Affari Internazionali (IAI), the Institute for Sustainable Development and International Relations / Institut du Développement Durable et des Relations Internationales (IDDRI), the German Institute of Development and Sustainability (IDOS) and ODI Global, 2026.

Readers are encouraged to quote or reproduce material from this report for their own publications. ECDPM, Elcano, IAI, IDDRI, IDOS and ODI Global request due acknowledgement and a copy of the publication.

ISSN 2984-0449